



McGowanPRO and the CPAOnePro Accountants Professional Liability Program are pleased to offer the following 2024 Live Risk Management Webinar Series for all McGowanPRO clients and friends. These exclusive webinars offer CPA firms valuable risk management tools that experts in the accounting profession are presenting. Each live webinar gives the attendee 1 hour of free CPE credit. The series can also provide a premium credit towards the firm's professional liability insurance. Please ask your broker for more details and register today.

**May 1 @
1 PM EST**

**Master the
Merger Process
(1 CPE)**

Presenter:
Joe Tarasco

Delivery Method:
Group Internet Based

Field of Study:
Business Management
& Organization

Course Description:

CPA firm owners should maintain a realistic perspective about the changing marketplace and how it relates to their internal vs. external succession options. It's important to evaluate the powerful impact private equity has and will have in the future. Also, continuously evaluating the market and considering viable succession options for their future, such as traditional M&A transactions, hybrid PE-Traditional deals, PE-Tuck-in, or platform firm-type transactions.

Learning Objectives:

- Learn the five stages of a deal transaction: preliminary discussions; transactional detail meetings and negotiations; an initial agreement outlined in a memo of understanding or letter of intent; due diligence; and the transaction agreement and signing of the partner/shareholder agreement.
- Learn about determining the best criteria to achieve a successful merger or private equity transaction, which is imperative to making the right decision at the right time to have a successful deal.
- Learn about developing a plan to guide the transaction and related checklists.

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**May 28 @
1 PM EST**

**Cultivating Culture for
Optimum Firm Growth
(1 CPE)**

Presenter:
Randy Crabtree

Delivery Method:
Group Internet Based

Field of Study:
Business Management
& Organization

Course Description:

Achieving an optimum level of growth in your firm requires more than vision. It requires a strong, synergistic team aligned with processes and practices that will keep your firm on track to meet short- and long-term goals. In this session, Randy Crabtree, The Unique CPA and co-founder of Tri-Merit Specialty Tax Firm (named one of the Inc., 5000 Fastest Growing Businesses), will share the specific strategies and practical steps that he and his team have taken to cultivate a culture that optimizes growth and has enabled them to grow revenue exponentially over the past six years.

Learning Objectives:

- Create your firm culture and learn how it can support your firm's growth.
- Determine the cultural aspects that will help to set the foundation for optimum firm growth.
- Learn seven key areas that support firm growth.
- Develop a plan to put the right people, processes, pricing, and products in place to achieve your goals.

Attendees will explore the importance of fostering a strong, firm culture that promotes teamwork, innovation, and employee satisfaction and supports practice growth strategies to position their firms for long-term success in a rapidly evolving industry.

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**June 5 @
1 PM EST**

**The Anatomy of
Defending a Claim
Involving the IRS and
Department of Justice
(1 CPE)**

Presenter:

Nancy Reimer Esq., Patrick
Cosgrove Esq., Dana Maine, Esq.
all of Freeman Mathis & Gary, LLP

Delivery Method:

Group Internet Based

Field of Study:

Business Management
& Organization

Course Description:

In this presentation, attorneys Dana Maine, Nancy Reimer, and Patrick Cosgrove will discuss defending a claim involving the IRS and Department of Justice commencing with the Taxpayer's receipt of the dreaded Notice of Deficiency. The webinar will focus on steps the Taxpayer and Accounting Professional can take upon receipt of the Notice from the IRS, including mitigation and contesting penalties, audits, and tax court cases. The webinar will also address some common claims related to the IRS and how to handle each type of claim.

Learning Objectives:

- Learn steps the Taxpayer and Accounting Professional can take upon receipt of the Notice from the IRS.
- Learn how to mitigate and contest penalties, audits, and tax court cases.
- Learn how to handle and respond to claims related to the IRS and Department of Justice.

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**June 25 @
1 PM EST**

**Sales Tax Refunds -
Free Money
(1 CPE)**

Presenter:

Mark Stone

Delivery Method:

Group Internet Based

Field of Study:

Business Management
& Organization

Course Description:

No myths here: sales tax refunds are indeed real! Join Mark L. Stone, CPA, MST, Managing Partner of Sales Tax Defense LLC, renowned as the "Babe Ruth of Sales Tax," in Sales Tax Refunds – Free Money, as he navigates through the essentials every business needs to understand concerning sales tax. He'll share insights, including his record-breaking client refund of nearly \$2 million, shedding light on opportunities often missed by businesses. Explore overlooked refund potentials, understand the refund application process, and recognize the pivotal importance of exemption certificates. Get ready to uncover the wealth of opportunities hidden within sales tax refunds!

Learning Objectives:

- Discovering sales tax refunds for your clients.
- Understanding the refund application process.
- Gain an understanding of exemption certificates.

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**July 16 @
1 PM EST**

**Engagement Letters
A to Z
(1 CPE)**

Presenter:

John Raspante

Delivery Method:

Group Internet Based

Field of Study:

Business Management
& Organization

Course Description:

Engagement Letters are a very important tool in any CPA's risk management toolbox! Many times, well-written engagement letters have stopped a claim from happening. In this updated 50-minute presentation, presenter John Raspante will discuss the engagement letter in response to the changes in tax law and the challenges in the accounting profession. John will point out the different caveats and clauses that all CPA firms should consider in their engagement letter language. Caveats will be discussed to address the rapid changes in both tax and A&A. Included will be clauses to manage the impact of the Way Fair decision, Pass-through entity taxes, and Cannabis.

Learning Objectives:

- Understanding the importance of the engagement letter as a risk management tool
- Develop a better understanding of the importance of certain protective language in an engagement letter.
- Understand the deductible incentives from your professional liability insurance when an engagement letter is used.

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**July 25 @
1 PM EST**

**Data Breach/Cyber
Tips, Tricks, and Best
Practices (1 CPE)**

Presenter:

Rob Ferrini

Delivery Method:

Group Internet Based

Field of Study:

Information Technology

Course Description:

In this updated presentation, Rob Ferrini will bring his experience counseling clients to discuss how to best protect your organization's brand, value, and assets in the face of a challenging insurance market, ever-growing attacks of accounting firms, and increasing cyber security requirements. He will also provide practical steps your firm can take to reduce risk and qualify for coverage at a reasonable price.

Learning Objectives:

- Gain knowledge on steps to protect your client's personal information.
- A better understanding of using the resources available in a Cyber Liability insurance policy
- How a cyber liability insurance policy helps you in compliance with State Information Security Laws.

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**August 6 @
1 PM EST**

**Risk Management
for Accountants -
Part 1 (1 CPE)**

Presenter:
Ralph G. Picardi, Esq.

Delivery Method:
Group Internet Based

Field of Study:
Business Management
& Organization

Course Description:

This is an updated webinar led by Ralph G. Picardi, Esq., a former CPA whose law practice is dedicated to defending and advising accounting firms and their insurers on professional liability matters. Topics include, among others, the risk environment, client acceptance and continuance, engagement letters, disengagement, billing and collection, file retention, and confidentiality issues (e.g., subpoenas; IRC §7216).

Learning Objectives:

- Gain an overview of the landscape of risk and legal exposures that accountants operate in.
- Obtain knowledge in steps to mitigate risk and exposure.

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**August 20 @
1 PM EST**

**Are You Fully Insured
for That Exposure?
(1 CPE)**

Presenter:
Rob Ferrini

Delivery Method:
Group Internet Based

Field of Study:
Business Management
& Organization

Course Description:

In this updated 50-minute presentation, Rob Ferrini walks the listener through the coverage of each insurance policy that a service provider should have and how they fill in coverage gaps. Policies to be discussed are Professional Liability Insurance (aka E&O), Cyber Liability Insurance, Commercial Crime (aka Employee Dishonesty), Employment Practices Liability Insurance (aka EPLI), Directors & Officers Liability Insurance (aka D&O), and Fiduciary Liability Insurance.

Learning Objectives:

- Understanding the different risks and exposures that need to be mitigated by the accounting profession.
- How using the different insurance policies transfers your risk and mitigates loss when you have a claim.

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**September 18 @
1 PM EST**

**I did not think of that!
Emerging Claims
Trends (1 CPE)**

Presenter:
John F. Raspante, CPA, CDFA,
MST, McGowanPRO's Director
of Risk Management

Delivery Method:
Group Internet Based

Field of Study:
Business Management
& Organization

Course Description:

In this updated presentation, we will discuss new and emerging exposures with risk management tools and procedures to help minimize the risk of doing business in today's business climate. Topics will include ongoing issues around the current pandemic, pass-through entity tax, Cannabis, The impact of the Wayfair Decision, state tax residency audits, and Digital currency.

Learning Objectives:

- Gain a better understanding of the different areas of risk that accountants operate in.
- Learn steps to mitigate legal exposure.

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**September 25 @
1 PM EST**

**Commercial Crime -
Protecting Your Firm
from Fraud and Theft
(1 CPE)**

Presenter:
Rob Ferrini of McGowanPRO &
Sean Kennedy of Hanover Insurance

Delivery Method:
Group Internet Based

Field of Study:
Business Management
& Organization

Course Description:

No business is completely safe from the threat of theft or fraud. Although large corporations can be lucrative targets, small and mid-sized businesses, including accounting firms, often suffer greater losses because their limited resources leave them more vulnerable to attack. Claims related to employee theft, fraudulent instruction emails, and fraudulent transfer fraud are on the rise. IS YOUR FIRM PREPARED? Joining Rob Ferrini for this informative webinar will be Sean Kennedy, Executive Underwriter - Fidelity & Crime with Hanover Insurance. Rob and Sean will be discussing some best practices that can help your firm reduce and transfer these risks, including what to look for, staff training tips, how to best cover the risk, and recent claims examples.

Learning Objectives:

- Gain an understanding of the fraud exposure from electronic hacking all professional service providers are facing.
- Obtain knowledge on steps to take to mitigate loss exposures.

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**October 16 @
1 PM EST**

**Client Information
and Cyber Security
(1 CPE)**

Presenter:
Konrad Martin

Delivery Method:
Group Internet Based

Field of Study:
Information Technology

Course Description:

Cybercriminals are thriving amidst the current cloud and cyber environment. For CPAs, cybersecurity is becoming a constant battle to protect their client's data. This updated webinar is an engaging source of critical information that will help your firm take control of its security in the face of an ever-changing landscape. Participants will come away with a clear picture of remote work security risks and their impact on their clients, as well as the most effective steps to mitigate them. They will receive actionable advice on creating a resilient security that not only complies with State Security laws but builds layered protection against the most common attack varieties.

Learning Objectives:

- Gain knowledge on the current information security risk landscape that professional service providers operate in.
- Learn steps to mitigate information security risk.
- Understand the compliance that must be followed.

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**October 22 @
1 PM EST**

**Risk Management for
Accountants - Part 2
(1 CPE)**

Presenter:
Ralph Picardi

Delivery Method:
Group Internet Based

Field of Study:
Business Management
& Organization

Course Description:

This webinar, led by Ralph G. Picardi, Esq., a former CPA whose law practice is dedicated to defending and advising accounting firms and their insurers on matters of professional liability, picks up where Part One webinar left off. Topics include, among others, general principles of defending claims, exposure to clients, exposure to third parties, and reporting claims/incidents to insurers.

Learning Objectives:

- Gain an overview of the landscape of risk and legal exposures that accountants operate in.
- Obtain knowledge in steps to mitigate risk and exposure

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**November 6 @
1 PM EST**

**Laws and Trends
Affecting the
Workplace (1 CPE)**

Presenter:
Chris Lavelle

Delivery Method:
Group Internet Based

Field of Study:
Business Management
& Organization

Course Description:

Employment laws can be confusing, and not being in compliance can create legal exposure for employers. Employment laws from minimum wage to cannabis use have led to a surge in employment litigation. Join us as presenter Chris Lavelle of USLI Insurance discusses these laws, claim trends, and risk transfer through the use of employment practices liability insurance, as well as risk management support that helps lower your legal exposures.

Learning Objectives:

- Gain a greater understanding of how employment laws affect the workplace and possibly the culture of your firm.
- Learn risk mitigation tools to lower your legal exposure.
- Understand the resources available to employment practices liability insurance policy holders.

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**November 19 @
1 PM EST**

**Tax Prep
Gone Wrong!
(1 CPE)**

Presenter:
Joe Jones & Neil Bermingham

Delivery Method:
Group Internet Based

Field of Study:
Business Management
& Organization

Course Description:

Tax claims against accountants represent the majority of claims against accounting firms. Joe and Neil, two guys in the know when it comes to claims against accountants, share stories about tax-related claims. Stories of the claim, allegations against the accountant, and what mitigation tools could have been applied to avoid the claim will be discussed.

Learning Objectives:

- Gain an understanding of the landscape of tax claims against accountants.
- Learn risk management tools to help mitigate the exposure to claims.

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