Partial List

2024

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	CPE
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7 Habbits of Effective CFOs	1
Accounting Changes, Error Corrections	1
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Employee Retention Credit & PTE Tax	2
How to Run a Meeting	2
Accounts Receivable: Best Practices	2.5
Accounting for Investments	3
Business Valuation	3
Tools & Tips for CPAs Using Excel	3
Fraud Overview for Accountants	4
Financial Forcasting and Modeling	5
Effective Negotiation	5
Investing Guidebook (5.5 CFP)	7
Wealth Management (6 CFP)	8
Real Estate Accounting	9
New Audit Reporting Standards	10
Accounting Procedures Guidebook	11
Interpretation of Financial Statements	11
Health Care Accounting	12
Accounting Controls Guidebook	12
Accounting for Inventory	13
Closing the Books	13
Public Company Acctg & Finance	13
Creating a Lean Acctg Department	14
Budgeting: Comprehensive Guide	14
Cost Accounting Fundamentals	14
Payroll Management	14
Credit and Collection Guidebook	14
Retail Management	14
Corporate Cash Management	15
Inventory Management	15
Invester Relations Guidebook	15
Bookkeeping Guidebook	15
Treasurer's Guidebook	16
Auditing Developments	16
Business Ratios Guidebook	16
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FASB Review	16
Current Devel. Acctg, Fin Report.	16
Non-Profit Accounting	16
Cost Management Guidebook	17
Accounting for Managers	18
New Controller Guidebook	18
Financial Analysis, Bus Decision	19
Mergers and Acquisitions	19
Human Resources Guidebook	20
Compliation & Review Update	20
Compilation and Review Update	20
CFO Guidebook	22
MBA Guidebook	23
International Accounting	25
GAAP Guidebook	29
Accountants' Guidebook	30

BEACON HILL Course-in-a-Book Titles

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	CFP® CE
Having the "Money Talk" with Clients (Client Communication)	5
Goals-Based Investing	5.5
Women and Divorce: Financial Aspects (+ CDFA)	Vol I: 3.5; Vol II:5.5
What Advisors Should Know/Psych. of Invest.	7
Advising Clients Divorcing After 50 (+ CDFA)	9
Child Custody and Support Course (+ CDFA)	9
What Advisors Should Know About Divorce (+ CDFA)	11.5
Executor's Guide	11
Social Security, Medicare, & Government Pensions	13.5
Asset Allocation -Gibson	14
Essential Guide to Divorce for Advisors (+ CDFA)	14
Natalie Choate: Planning for Retirement Benefits	23.5
Private Wealth Management - Hallman/Rosenbloom	28

CE Continuing Education Approved IRS Provider

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idfa Institute for Divorce Financial Analysts

Short Financial Planning Courses

	CFP®	CPA
Health Savings Accounts	1	1.5
Business Valuation	2	3
Personal Life Insurance Planning	2.5	4
Individual Retirement Accounts	4	5.5
Long-Term Care Planning	4.5	5.5
Annuities	5	7
Completre Divorce Guide (+ CDFA)	7	-
Principles of Wealth Management	7	9
Interpretation of Financial Statements	7.5	11

Long Financial Planning Courses

	CFP®	CPA
Facilitating Financial Health	11	-
Advisor's Guide to Estate Planning	21	29
Advisor's Guide to Investment Planning	28	36
Private Wealth Mgt - Hallman/Rosenbloom	28	

Short Tax Courses (Updated Annually)

	CFP®	CPA	IRS
199A Pass-Through Deduction	-	3	3
Auto Rules	-	2	2
Business Travel & Entertainment	-	2	2
Business Expenses (Tax Guide)	-	2	2
Compensation & Benefits (Tax Guide)	2	3.5	3
Coronavirus and CARES Tax Summary	1.5	3	3
Divorce Transfers & Settlemts (+ CDFA)	2	2	2
Earned Income Credit	-	4	4
Education Tax Benefits	3.5	5	5
Estate, Gift, Generation-Skipping Transf		8	8
Estate Planning (Tax Guide)	-	2	2
Estate Tax Planning	3	4	4
Family Tax Planning	2	2	2
Federal Income Tax Changes	4	6.5	6
Federal Income Tax Update	8.5	9	9
Gift Taxes	-	3	3
Home Office Deduction	2	3	3
Inflation Reduction Act		2	2
Information Security: Basic Safeguards	4.5	6	6
Individual Retirement Plans-Tax	-	3	3
Keeping Taxpayer Data Secure	2	2.5	2
Navigating Form 1040 Sched. C	2	3	3
Passthrough Business Deduction	1	2	2
Retirement Planning (Tax Guide)		3	3
Retirement Plans, Pensions,Annuities	2	3.5	3
Tax Guide S-Corporations	-	3	3
Tax Treatment Individual Retirement Plans	-	3	3
Tax Treatment of Virtual Currency	1.5	1.5	1

Long Tax Courses (Updated Annually)

	CFP®	CPA	IRS
Annual Tax Season Update	-	8	8
Asset Protection Tax Strategies	12	17.5	17
Comprehensive Family Tax Planning	-	24	24
Comprehensive Tax Course: Ret.Plan.	22	31.5	31
Corporate Tax Planning	-	21	21
Divorce Tax Planning (+ CDFA)	10	16	16
Estate Planning: Tax Strategies	14.5	20	20
Financial Planning:Tax Strategies	10	14.5	14
Guide to Federal Indiv & Corp. Tax.	26	35.5	35
Partnership Taxation	7.5	13.5	13
Passive Losses	-	10.5	10
Real Estate Tax Planning	7.5	11	11
Retirement Planning: Tax Strategies	12	17.5	17
Small Business Tax Planning	19	24.5	24
1040 Workshop	20	28	28

We report CFP® , CDFA®, and IRS credits.

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