

June 18, 2024

An Ethical Framework for CPA's

Josephine Sarnelli, CPA

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In many cases, a person facing an ethical dilemma may not use a reasoning process but rather do what they simply feel is best at the time. Others may use principles they learned from their family, peers, religious teachings or own experiences. This program will address adherence to an ethical framework for professional conduct. (4 Hours fulfills Ethics Requirement)

General Information

Each session qualifies for 3 hours of Continuing Professional Education credits, except for the June 18th session which qualifies for 4 credits. The sessions meet on Tuesdays from 3:00 until 6:00, except for June 18th which begins at 2:00 to offer 4 hours of CPE. The cost of attending all or any part of the seven-week series is \$100.00.

Write check payable: CPE Forum

Mail check: Josephine Sarnelli, CPA
14 Mill Street
Westfield, MA 01085

About the CPE Forum

The CPE Forum was established in the Fall of 1980 by Josephine (Jo) Sarnelli, CPA (www.SarnelliCPA.com). The Forum's mission is to provide high quality educational programs at a low cost to business professionals, including Certified Public Accountants and others seeking continuing professional educational (CPE) credits for licensing purposes. It is also open to the general community.

Online Learning

All sessions are conducted online with live streaming and interactive participation using the Zoom webinar application. You can join a session using a smart cellphone, tablet, computer, or laptop. If your computer does not have a microphone or speaker, you can use either your landline or cellphone in conjunction with your computer. A video camera is not required.

Register in advance for these webinars:

https://us02web.zoom.us/webinar/register/WN_RGqHgZI6SsW4gIrTulTXAg

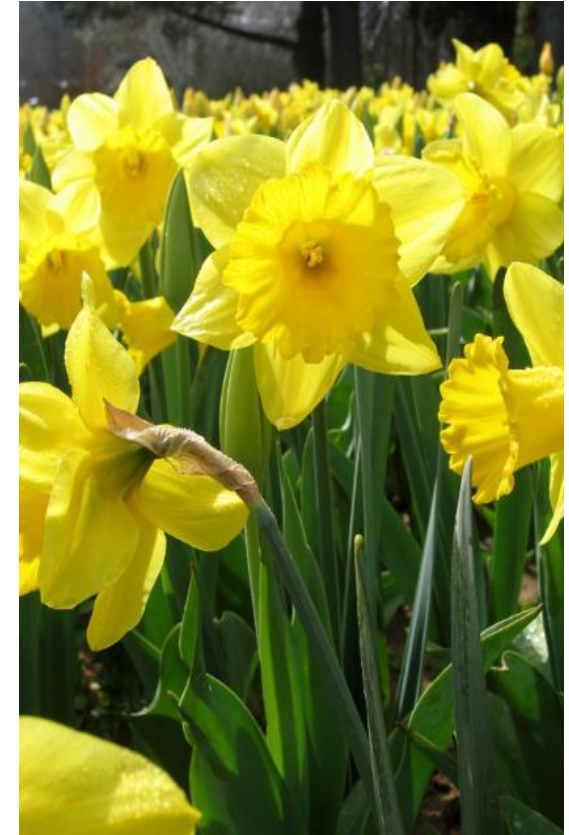
After registering, you will receive a confirmation email with information about joining the webinars.

RETAIN THAT CONFIRMATION EMAIL. IT WILL HAVE THE SECURITY LINK TO ATTEND THE ENTIRE SERIES.

For more information and assistance on registering, visit www.cpeForum.org.

CPE Forum

Spring 2024
Online Educational
Programs



Contact:
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(413) 746-9067
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May 7, 2024

Asset Protection

Kevin D. Quinn, J.D., President
Legacy Counsellors, P.C.

kquinn@legacycounsellors.com

Attendees will learn why off-shore planning is generally not effective tax planning, but can be effective creditor protection planning. There will be an explanation of how your assets can stay in the country, under your personal management and control, but not be subject to U.S. creditor claims. The purpose of this course is to demonstrate how these strategies work and to dispel the common misunderstanding about creditor protection planning.

May 14, 2024

Executive Benefits: Key Employee Retention and Risk Management

Pete Miller, CEBS, ChFC
Peaked Ridge Insurance, LLC

pmiller@peakedridge.com

This presentation will explain how employers can enhance their benefits plans, add tangible financial incentives for continued employment, and manage risk associated with key employees.

May 21, 2024

Hot Topics in Employment Law: PFML & Medical Leave Updates & How to (Lawfully) Curb Abuse &

Keeping your Employee Handbooks Legally Compliant

Amelia J. Holstrom, Esq.
Meaghan E. Murphy, Esq

www.Skoler-Abbott.com

Employment laws are constantly changing and employers who do not keep up with those changes can create legal liability for their businesses. Attorney Holstrom will provide important information about the changes to the PFML law; how to lawfully address suspected PFML abuse; and address some of the ambiguities in the law. Attorney Murphy will provide important updates related to employee handbooks and identify steps you should take to keep your handbooks legally compliant.

May 28, 2024

Corporate Transparency Act

Steven Friedman, Esq.
Platinum Filings LLC

steven@PlatinumFilings.com

The CTA was enacted by Congress in January 2021 to help curtail money laundering. It requires millions of businesses to file a beneficial ownership information report with the Department of Treasury's Financial Crimes Enforcement Network (FinCEN). Steven is a sought-after speaker and hosts weekly webinars on the CTA and its implications.

June 4, 2024

ESOP - A flexible tax- efficient ownership succession strategy

Joseph Verri, Morgan Stanley

<https://advisor.morganstanley.com/the-128-group>

Tabitha M. Croscut, Esq.

www.devinemillimet.com/tcroscut

Chuck Coyne, Sr. Managing Director
Empire Valuation Consultants

www.empireval.com

This session will provide an introduction to the tax advantages of an employee stock ownership plan (ESOP), the structure of an ESOP stock purchase transaction, and a step-by-step for the process of completing an ESOP transaction. The experienced panel of ESOP advisors will spend some time covering the primary considerations an owner should focus on when considering to utilize an ESOP for ownership transition.

June 11, 2024

Artificial Intelligence: Legislation Concerning the “Responsible Use” of AI

Attorney Michael McAndrew
Bulkley, Richardson and Gelinas, LLP

mmcandrew@Bulkley.com

Michael McAndrew is a commercial litigator who seeks to understand the implications and risks of businesses adopting AI. He will examine Legislation in Massachusetts and Connecticut concerning its use.