November 19, 2024

Cyber-Threats

Charlie Christianson, President
CMD Technology Group
cac@cmdweb.com

Charlie Christianson will speak on Cyber-Threats and strategies for protecting your business. He will be joined by Paul Shepardson, Digital Systems Officer at Monson Savings Bank to discuss threats and security as it affects our banking system and those that use it.

November 26, 2024

Annual Tax Update (4 Hours)

Deborah Rogers, CPA
Deb Rogers, CPA deb@rg-cpa.net

Deb, an active member of the Mass Society of CPAs Tax Committee, will speak on current tax updates. She will lead a high-level discussion and presentation on current tax law developments at both the Federal and State level. The program will begin at 2:00 and end at 6:00 to qualify for 4 hours of CPE credits.

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 CPA's and others seeking continuing professional educational (CPE) credits for licensing purposes. It is also open to the general community.

General Information

Each session qualifies for 3 hours of Continuing Professional Education credits, except for the November 26th session which qualifies for 4 credits. The sessions meet on Tuesdays from 3:00 until 6:00, except for November 26th which begins at 2:00 to offer 4 hours of CPE. The cost of attending all or any part of the six-week series is $100.00.

Write check payable to: CPE Forum

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

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_TteY3OB3QTWeuGc_Jp4uZA

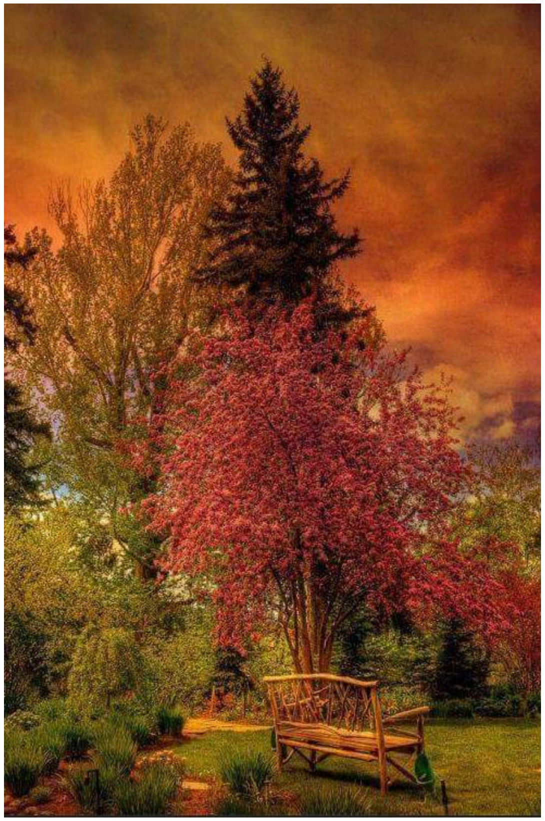
After registering, you will receive a confirmation email with information about joining the webinars.

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

CPE Forum

Fall 2024

Online Educational Programs



Contact:
Josephine Sarnelli, CPA
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www.cpeForum.org

October 22, 2024

IRA Distribution Planning

Kevin D. Quinn, J.D., President
Legacy Counsellors, P.C.
kquinn@legacycounsellors.com

The one nearly universal asset most of your clients have is a retirement account of some kind. For many of your clients, this is the second largest asset after their home or business. While the SECURE Act impedes our ability to leverage these assets postmortem, we can still offer our clients and their descendants significant advantages from these assets with proper planning. We will delve deeply into the rules concerning postmortem IRA distribution planning, the use of trusts when planning for an IRA, charitable planning with IRA distributions, and Roth conversions. Participants are guaranteed to walk away with a deeper understanding of how to leverage the benefits of a retirement account postmortem.

October 29, 2024

ABCs of Effective Workplace Discipline and/or Discharge

Elaine M. Reall, Esq.
EReall@TheRoyalLawFirm.com

The Massachusetts workplace is a highly regulated arena. Attorney Reall will examine the basics of effective (and lawful!) discipline and discharge strategies. In addition, she will provide an update on changing federal and state legal standards in various employment discrimination areas (ex: religious discrimination, interactive accommodation, conversations with disabled employees, etc.).

On Employees & Employers: Legal Update

Jason Ortiz, Esq.
JOrtiz@TheRoyalLawFirm.com

Employers who fail to update their policies promptly and properly risk facing legal consequences because employment rules are ever-changing. Attorney Jason Ortiz is an experienced litigation attorney working for The Royal Law Firm, an employer side business law firm. He will speak on important legal updates regarding the labor and employment world, such as issues surrounding the practice of time clock rounding of minutes, the new Department of Labor rule governing employee v. independent contractor status, commissions v. profit sharing, and other subjects.

November 5, 2024

You Can't Manage What You Don't Measure – Harnessing Neuroscience to Measure Organizational Culture and Motivation

Lynn Turner, Core XP Business Solutions
www.corebusinessxp.com

In the world of finance and accounting, measurement is the key to managing success. Historically, certain aspects of business—like culture and employee motivation—have been challenging to quantify, making them harder to manage. But with advances in neuroscience/behavioral frameworks, we can now measure what was once considered intangible, so as giving organizations a new way to understand and improve their culture, engagement, and overall success.

In this session, we will explore how advances in neuroscience-based frameworks provide practical ways to measure organizational culture and employee motivation. By applying data-driven insights to leadership and motivation, companies can attract, retain, and engage top talent while driving performance.

November 12, 2024

Comprehensive Capabilities for a Plan that's Distinctly Yours: Post Election Market Update & Tax Benefits to Direct Indexing

Gregg Desmarais
Brett Bartkiewicz
Partners, Crescent Point Private & Wealth
Family Wealth Advisor, RJFS
Members FINRA/SIPC
gdesmarais@cppwealth.com
bbartkiewicz@cppwealth.com

The speakers will present on the core foundational elements needed to construct a sound, holistic financial plan for families and business owners. They will be joined by Christopher Hodgdon who will provide a post-election market update and Kyle Berthel who will discuss the tax benefits of Direct Indexing – both of whom are Vice Presidents at First Trust Advisors.