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 free of charge.

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_yV4hfaLpQF2o_crwEE-ZOw?_gl=1*1ar9hps*_gcl_au*MTg5NTUyMzg5Ny4xNzU3OTI1Nzc2LjE2NjQ4NTY3NjUuMTc2MDU1OTMwNC4xNzYwNTU5MzA2*_ga*NDkxNjA2Ny4xNjM2MzcyNTIz*_ga_L8TBF28DDX*czE3NjA2NDUyNDUkbzM2MyRnMSR0MTc2MDY0NTMwNyRqNTkkbDAkaDA.

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. USE THE SAME LINK EACH WEEK WITH NO NEED TO RE-REGISTER.

General Information

Each session qualifies for 3 hours of Continuing Professional Education credits, except for the November 25th session which qualifies for 4 credits. The sessions meet on Tuesdays from 3:00 until 6:00, except for November 25th 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

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David Thibault, First Vice President,
Institutional Banking Country Bank
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CPE Forum

Fall 2025

Online Educational Programs

Contact:
Josephine Sarnelli, CPA
(413) 746-9067
info@cpeForum.org
www.cpeForum.org

October 28, 2025

Coaching Skills for CPAs

Joshua Hornick, JD, MA, PCC
Director, Hornick School of Coaching
jh@jhcoaching.com

Coaching is a skill that you use in your profession. Whether you're leading a team, managing client relationships, or developing staff, the ability to bring out the best in people is essential. This interactive session will explore practical approaches to delegating effectively, helping others honor their commitments, and creating conditions where people can do their best work. You'll leave with approaches you can apply immediately in your practice—whether you're coaching staff through challenging projects, helping clients make better decisions, or developing the next generation of leaders in your firm

November 4, 2025

Perspectives to Help You Advise Family-Owned Companies

Ira Bryck Founder, UMASS Family Business Center ira@irabryck.com

Ira Bryck helps leaders grow. He founded (and ran, for 25 years) the UMass Amherst Family Business Center, which provided expert and peer learning through forums, workshops, consulting and roundtables. His new work includes coaching business leaders, using personality assessments, mediation, and practical tools.

November 11, 2025

The Balance Sheet of Reputation: How Brand Impacts Business

Meghan Lynch, CEO
Six-Point Strategy
meghan@sixpointstrategy.com

Learn how reputation and brand positioning function as real business assets, influencing valuation, margins, and exit opportunities. Case studies will highlight how CPAs can guide clients to recognize brand as part of their long-
term wealth strategy.

November 18, 2025

Planning is Autobiographical: Tax-Smart and Values-Driven Financial, Estate and Charitable Giving Strategies

Sarah E. Dolven, Esq., Attorney,
Sharp, Heyman, Dolven & Elkins, LLP
sdolven@zshdlaw.com

Vikki Lenhart, CFP, Partner/Managing Director, Beacon Pointe Advisors
vlenhart@beaconpointe.com

Jenny Papageorge, CAP, Director of Planned Giving, Cooley Dickinson Hospital jpapageorge@mgb.org

What happens when you get professional advisors to collaborate together? We help our clients dream what's possible! Using real examples from our work and insights from studies from The Philanthropic Initiative/U.S. Trust and Fidelity Charitable, join us to learn practical tools and strategies to help clients give smarter, align their giving with their values, and keep more of their money working for the people and the causes that matter to them.

November 25, 2025

Annual Tax Update (4 Hours)

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.

December 2, 2025

TBA

David Thibault, First Vice President,
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Program details are not available at press time. Sponsored by Country Bank.