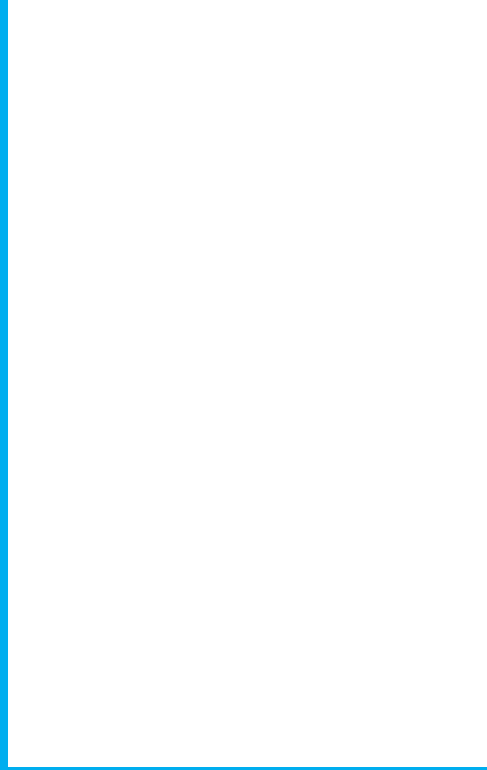


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MONTEREY CE WEEK ☀ AUGUST 22-26, 2011

# [ discover Monterey CE Week ]

## Embassy Suites Monterey Bay

The Embassy Suites Monterey Bay is just minutes from local beaches, the Monterey Peninsula Airport, the renowned Monterey Bay Aquarium, Maritime Museum of Monterey, Mazda Laguna Seca Raceway, Monterey's Fisherman's Wharf and Cannery Row. Additionally, this upscale full-service, all-suite hotel is just a short drive from the famous 17 Mile Drive, the resorts of Pebble Beach, Spyglass Hill Golf Course, Carmel by-the-Sea, the Carmel Mission, the Links at Spanish Bay Golf Course, Big Sur and the National Steinbeck Center.

### Rates

As a CE Week attendee you'll enjoy special the discounted room rate of \$217 single/ double occupancy plus applicable state and local taxes and tourism fees. (Rates valid Aug. 20-28).

Call 1 (800) EMBASSY or (831) 393-1115 for reservations. Ask for California CPA Education Foundation group rate.

Note: Space is limited and may sell out before the July 21, 2011 cut-off date, so make your reservations early.

### Save the Date

The next Monterey CE Week takes place August 20-24, 2012.



## Course Schedule

### MONDAY, AUGUST 22

#### Ethical and Legal Standards for CPAs

Dana A. Basney, CFE, CIRA, ABV  
Credit: CPE 8, ET 4, RR 2, FR 2  
Event: 4111179C

#### Living Trust Administration Workshop

David B. Gaw, ESQ  
Credit: CPE 8, CFP-EP 8, MCLE 6.5,  
LS-EP 6.5, CTEC-CA 1, CTEC-Fed 8  
Event: 4111274A

#### Auditing: Practical Application of Current Standards

Thomas E. Noce, CPA, CFE, PFP  
Credit: CPE 8, GT 8, AA 8, FR 2  
Event: 4111369C

#### Basis Calculations & Distributions for Pass-Through Entity Owners (Schedule K-1 Analysis)

J. Patrick Garverick, CPA, MT, CFP  
Credit: CPE 8, EA 8, CTEC-Fed 8, MCLE 6.5  
Event: 4112281D

### TUESDAY, AUGUST 23

#### The Art of High-End Estate Planning

David B. Gaw, Esq. and  
Jacqueline A. Patterson, JD, CPA, MBT  
Credit: CPE 8, MCLE 6.5, LS-EP 6.5  
Event: 4112323A

#### New Federal Tax Law-Individual and Business Current Developments You Need To Know

J. Patrick Garverick, CPA, MT, CFP  
Credit: CPE 8, EA 8, CTEC-Fed 8,  
LS-TX 6.5, MCLE 6.5  
Event: 4111357D

#### Fraud: Essential Audit Tools and Techniques

Thomas E. Noce, CPA, CFE, PFP  
Credit: CPE 8, FR 8, GT 8, AA 8  
Event: 4111238C

### CREDIT INFORMATION

AA	Recommended for fulfilling the 24-hour A&A CPE requirement.	RR	Recommended for fulfilling the Regulatory Review CPE requirement (in California).	MCLE	Qualifies for MCLE credit.	CFP-GP	Qualifies for CFP—General Principles of Financial Planning.
EA	Recommended for fulfilling the Enrolled Agents CPE requirement.	FR	Recommended for fulfilling the Fraud CPE requirement.	LS-EP	Qualifies for Legal Specialization (Estate Planning, Trust and Probate Law).	CFP-IT	Qualifies for CFP—Income Tax Planning.
ET	Recommended for fulfilling the Ethics CPE requirement (in California).	GT	Recommended for fulfilling the Government CPE requirement.	LS-TX	Qualifies for Legal Specialization (Taxation Law).	CTEC-CA	Qualifies for California CTEC credit.
				CFP-EP	Qualifies for CFP—Estate Planning.	CTEC-Fed	Qualifies for Federal CTEC credit.

#### Financial Statement Disclosures for the Tax Practitioner

Al Partington, CPA  
Credit: CPE 8, AA 8  
Event: 4111246C

### WEDNESDAY, AUGUST 24

#### The Accountant's Responsibility for Fraud

Mark E. Dauberman, CPA  
Credit: CPE 8, FR 8, AA 8  
Event: 4111051B

#### Asset Protection Planning

Jacob Stein, ESQ, JD, LLM  
Credit: CPE 8, CTEC-Fed 8, CFP-EP 8,  
MCLE 6.5, LS-EP 6.5  
Event: 4111063C

#### Compilation and Review: Basic Review and Update

Al Partington, CPA  
Credit: CPE 8, AA 8  
Event: 4111155D

#### Form 1041 Workshop

Jacqueline A. Patterson, CPA, JD, MBT  
Credit: CPE 8, CFP-EP 8, MCLE 6.5,  
LS-EP 6.5, AA 1  
Event: 4111979B

### THURSDAY, AUGUST 25

#### S Corps: A Complete Guide to Planning and Compliance

Edward K. Zollars, CPA  
Credit: CPE 8, EA 8, CTEC-Fed 8,  
LS-TX 6.5, MCLE 6.5  
Event: 4111442B

#### Tax Issues in Divorce

Beverly Brautigam, CPA, MBA and  
Hal D. Bartholomew, ESQ, JD, CFLS  
Credit: CPE 8, CFP-IT 8, LS-TX 6.5,  
MCLE 6.5, LS-FL 6.5  
Event: 4111066A

#### Accounting and Auditing with Excel

Jeff S. Lenning, CPA, CITP  
Credit: CPE 8, AA 8, FR 2  
Event: 4111013B

#### Codification Topic 820: Fair Value Measurements and Disclosures

Suzan C. Dennis, CPA, MSA  
Credit: CPE 8, AA 8  
Event: 4111203B

### FRIDAY, AUGUST 26

#### Advanced Excel—WORKSHOP

Jeff S. Lenning, CPA, CITP  
Credit: CPE 8  
Event: 4111030A

#### California Fraud Case Studies

Suzan C. Dennis, CPA, MSA  
Credit: CPE 8, FR 8, AA 8  
Event: 4112006A

#### Preparation of Forms 1040NR and 540NR for the Visiting Non-U.S. Citizen

Thomas J. Spott, CPA  
Credit: CPE 8, MCLE 6.5  
Event: 4112192A

#### Partnership and LLC Taxation: Advanced Issues, Including Transfers of Interests and Liquidations

Edward K. Zollars, CPA  
Credit: CPE 8, EA 8, CTEC-Fed 8,  
LS-TX 6.5, MCLE 6.5  
Event: 4111398A

*Paperless events shown in green text.*

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For VP members and coupon users, a \$125 cancellation fee will be charged for all cancellations made less than four business days prior to the event. All VP no-shows will have 8 hours of VP credit deducted for each day of instruction missed. Coupon no-shows must surrender the coupon used to register. For registration policies, please go to [www.educationfoundation.org/policies](http://www.educationfoundation.org/policies).

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