

WithumSmith+Brown, PC

2017 CPE Schedule



STAFF "CORE" TRAINING

Date(s)	Time	Topic	Target Audience	Instructor(s)	Location	CPE Credits	CPE Category
November 6-17, 2017 November 27-29, 2017	8:30 am - 4:30 pm	Empower	New Staff Is	Withum Fellows	Heldrich Hotel - New Brunswick, NJ	72	Audit, Taxes
January 9, 2018	8:30 am - 4:30 pm	Empower Refresher	New Staff Is	Withum Fellows	Hilton - East Brunswick, NJ	8	Audit, Taxes
June 5-9, 2017	8:30 am - 4:30 pm	Level I	Staff Is who have completed 1 busy season	Withum Fellows	Heldrich Hotel - New Brunswick, NJ	40	Audit, Taxes, Specialized Knowledge
July 10-13, 2017	8:30 am - 4:30 pm	Level II	Staff IIs who have completed 2 busy season	Withum Fellows	Heldrich Hotel - New Brunswick, NJ	32	Audit, Taxes
July 25-26, 2017	8:30 am - 4:30 pm	Level III - In-Charge Training	Newly Promoted or Hired Seniors	Withum Fellows	Heldrich Hotel - New Brunswick, NJ	16	Audit, Taxes
August 23-24, 2017	8:30 am - 4:30 pm	Level IV - Supervisor Training	Newly Promoted or Hired Supervisors	Withum Fellows	Heldrich Hotel - New Brunswick, NJ	16	Audit, Taxes
January 10, 2018	8:30 am - 4:30 pm	Intern Tax Training	Tax Season Interns	Withum Fellows	Heldrich Hotel - New Brunswick, NJ	n/a	n/a

LEADERSHIP 2017

Date(s)	Time	Topic	Target Audience	Instructor(s)	Location	CPE Credits	CPE Category
May 18, 2017	8:30 am - 4:30 pm	Leadership Training	Administrative Staff	The Rainmaker Companies - Adelaide Ness	Hilton - East Brunswick, NJ	n/a	n/a
May 19, 2017	8:30 am - 4:30 pm	Leadership Training	Administrative Staff	The Rainmaker Companies - Adelaide Ness	Hilton - East Brunswick, NJ	n/a	n/a
June 26, 2017	8:30 am - 4:30 pm	Leadership Training	Staff I and Staff II	The Rainmaker Companies - Adelaide Ness	Palace - Somerset, NJ	8	Nontechnical - TBD
July 17, 2017	8:30 am - 4:30 pm	Leadership Training	Staff I and Staff II	The Rainmaker Companies - Adelaide Ness	The New Yorker Wyndam Hotel - NYC	8	Nontechnical - TBD
August 7, 2017	8:30 am - 4:30 pm	Leadership Training	Staff I and Staff II	The Rainmaker Companies - Adelaide Ness	Withum's Orlando Office	8	Nontechnical - TBD
August 14, 2017	8:30 am - 4:30 pm	Leadership Training	Staff I and Staff II	The Rainmaker Companies - Adelaide Ness	Heldrich - New Brunswick, NJ	8	Nontechnical - TBD
June 8, 2017	8:30 am - 4:30 pm	Leadership Training	Seniors and Supervisors	The Rainmaker Companies - Adelaide Ness	Heldrich - New Brunswick, NJ	8	Nontechnical - TBD
July 24, 2017	8:30 am - 4:30 pm	Leadership Training	Seniors and Supervisors	The Rainmaker Companies - Julie McPherson	Heldrich - New Brunswick, NJ	8	Nontechnical - TBD
August 8, 2017	8:30 am - 4:30 pm	Leadership Training	Seniors and Supervisors	The Rainmaker Companies - Adelaide Ness	Withum's Orlando Office	8	Nontechnical - TBD
August 15, 2017	8:30 am - 4:30 pm	Leadership Training	Seniors and Supervisors	The Rainmaker Companies - Julie McPherson	Heldrich - New Brunswick, NJ	8	Nontechnical - TBD
June 12, 2017	8:30 am - 4:30 pm	Leadership Training	Managers, Senior Managers, and Principals	The Rainmaker Companies - Julie McPherson	The New Yorker Wyndam Hotel - NYC	8	Nontechnical - TBD
July 25, 2017	8:30 am - 4:30 pm	Leadership Training	Managers, Senior Managers, and Principals	The Rainmaker Companies - Julie McPherson	Heldrich - New Brunswick, NJ	8	Nontechnical - TBD

August 9, 2017	8:30 am - 4:30 pm	Leadership Training	Managers, Senior Managers, and Principals	The Rainmaker Companies - Adelaide Ness	Withum's Orlando Office	8	Nontechnical - TBD
August 14, 2017	8:30 am - 4:30 pm	Leadership Training	Managers, Senior Managers, and Principals	The Rainmaker Companies - Julie McPherson	Heldrich - New Brunswick, NJ	8	Nontechnical - TBD
June 27, 2017	8:30 am - 12:00 pm	Leadership Training	Partners	The Rainmaker Companies - Adelaide Ness & Angie Grissom	Palace - Somerset, NJ	4	Nontechnical - TBD
July 19, 2017	8:30 am - 12:00 pm	Leadership Training	Partners	The Rainmaker Companies - Adelaide Ness & Angie Grissom	Palace - Somerset, NJ	4	Nontechnical - TBD
August 16, 2017	1:00 pm - 5:00 pm	Leadership Training	Partners	The Rainmaker Companies - Adelaide Ness & Angie Grissom	Heldrich - New Brunswick, NJ	4	Nontechnical - TBD

A&A TRAINING

Date(s)	Time	Topic	Target Audience	Instructor(s)	Location	CPE Credits	CPE Category
November 2, 2017	8:30 am - 4:30 pm	A&A Update for Non-Audit Staff	Non-Audit Staff who Require A&A Credits for their License	Withum Technical Resources & Friends	Hilton - East Brunswick, NJ	8	A&A
November 16, 2017	8:30 am - 4:30 pm	Annual A&A Update for Auditors	Experienced Senior - Partner Auditors	Withum Technical Resources & Friends	Renaissance - Woodbridge, NJ	8	A&A
Tentative - December 7, 2017	8:30 am - 4:30 pm	Annual A&A Update	Experienced Senior - Partner	Withum Technical Resources & Friends	TBD - FL	8	A&A
TBD	TBD	A&A Webinar Series 1	Experienced Senior - Partners	Withum Technical Resources & Friends	Webinar	1	A&A
TBD	TBD	A&A Webinar Series 2	Experienced Senior - Partners	Withum Technical Resources & Friends	Webinar	1	A&A
TBD	TBD	A&A Webinar Series 3	Experienced Senior - Partners	Withum Technical Resources & Friends	Webinar	1	A&A
TBD	TBD	A&A Webinar Series 4	Experienced Senior - Partners	Withum Technical Resources & Friends	Webinar	1	A&A
TBD	TBD	A&A Webinar Series 5	Experienced Senior - Partners	Withum Technical Resources & Friends	Webinar	1	A&A
TBD	TBD	A&A Webinar Series 6	Experienced Senior - Partners	Withum Technical Resources & Friends	Webinar	1	A&A
TBD	TBD	A&A Webinar Series 7	Experienced Senior - Partners	Withum Technical Resources & Friends	Webinar	1	A&A
TBD	TBD	A&A Webinar Series 8	Experienced Senior - Partners	Withum Technical Resources & Friends	Webinar	1	A&A

TAX TRAINING

Date(s)	Time	Topic	Target Audience	Instructor(s)	Location	CPE Credits	CPE Category
December 5, 2017	8:30 am - 4:30 pm	Annual Tax Update	Experienced Seniors - Partners	Withum - Anthony Nitti	Heldrich - New Brunswick, NJ	8	Taxes
December 8, 2017	8:30 am - 4:30 pm	Annual Tax Update	Experienced Seniors - Partners	Withum - Anthony Nitti	The New Yorker Wyndam Hotel - NYC	8	Taxes
TBD	8:30 am - 4:30 pm	Annual Tax Update	Experienced Seniors - Partners	Withum - Anthony Nitti	TBD - FL	8	Taxes
January 9, 2018	8:30 am - 4:30 pm	Tax Hot Topics	Experienced Seniors - Partners	Withum Tax Department	Hilton - East Brunswick, NJ	8	Taxes
May 24, 2017	8:30 am - 9:30 am	Tax Webinar Series 1 - Estate and Trust	Experienced Senior - Partners	Withum Tax Department	Webinar	1	Taxes

June 28, 2017	8:30 am - 9:30 am	Tax Webinar Series 2 - SALT	Experienced Senior - Partners	Withum Tax Department	Webinar	1	Taxes
July 27, 2017	12:00 pm - 1:00 pm	Tax Webinar Series 3 - International	Experienced Senior - Partners	Withum Tax Department	Webinar	1	Taxes
August 2, 2017	8:30 am - 9:30 am	Tax Webinar Series 4 - Partnerships	Experienced Senior - Partners	Withum Tax Department	Webinar	1	Taxes
August 9, 2017	8:30 am - 9:30 am	Tax Webinar Series 5 - Corporations	Experienced Senior - Partners	Withum Tax Department	Webinar	1	Taxes
August 16, 2017	8:30 am - 9:30 am	Tax Webinar Series 6 - Poillucci's Potpourri	Experienced Senior - Partners	Withum Tax Department	Webinar	1	Taxes
August 23, 2017	8:30 am - 9:30 am	Tax Webinar Series 7 - Tax Controversy	Experienced Senior - Partners	Withum Tax Department	Webinar	1	Taxes
September 18, 2017	11:00 am - 12:00 pm	Tax Webinar Series 8 - Individuals	Experienced Senior - Partners	Withum Tax Department	Webinar	1	Taxes

ACL TRAINING

Date(s)	Time	Topic	Target Audience	Instructor(s)	Location	CPE Credits	CPE Category
June 5, 2017	8:30 am - 4:30 pm	ACL Training for New Users	All Level I Training Attendees and Other New ACL Users	Kevin McElgunn and Anastasia Noce	Heldrich - New Brunswick, NJ	8	Specialized Knowledge
June 7, 2017	8:30 am - 4:30 pm	ACL Training for New Users	All Level I Training Attendees and Other New ACL Users	Kevin McElgunn and Anastasia Noce	Heldrich - New Brunswick, NJ	8	Specialized Knowledge
Fall TBD	TBD	ACL Training for Experienced Users	Experienced Users	Sumit Pal	TBD	TBD	Specialized Knowledge

COMPLIANCE

Date(s)	Time	Topic	Target Audience	Instructor(s)	Location	CPE Credits	CPE Category
August 16, 2017	8:30 am - 12:00 pm	NJ Law & Ethics	All NJ CPAs who still need Ethics	Tim Gearty - Becker	Heldrich - New Brunswick, NJ	4	Regulatory Ethics
November 15, 2017	8:30 am - 12:00 pm	Florida Ethics	All FL staff	FICPA	TBD - FL	4	Regulatory Ethics
TBD	TBD	Independence Training	All New Hires	Withum Technical Resources	Webinar	1	Regulatory Ethics

OTHER

Date(s)	Time	Topic	Target Audience	Instructor(s)	Location	CPE Credits	CPE Category
July 24, 2017	8:30 am - 12:00 pm	Having It All: Managing a High-Performance, Flexible Work Environment	Mandatory FL Managers - Partners	Jennifer Wilson - Convergence Coaching	Withum's Orlando Office	4	Personal Development
August 17, 2017	8:30 am - 12:00 pm	Having It All: Managing a High-Performance, Flexible Work Environment	Mandatory Managers - Partners	Jennifer Wilson - Convergence Coaching	Palace - Somerset, NJ	4	Personal Development

NICHE TRAINING

Date(s)	Time	Topic	Target Audience	Instructor(s)	Location	CPE Credits	CPE Category
April 24, 2017	8:30 am - 4:30 pm	Introduction to ERISA Audits	New Staff Working on ERISA	Withum - Michael Yarrow and Donna Nevolo	101 Carnegie Center - Princeton, NJ	8	Auditing
June 2, 2017	8:00 am - 5:00 pm	Introduction to ERISA Audits	New Staff Working on ERISA	Withum - Wendy Terry, Jennifer Keshwar, Kimberly Marten	Withum - Orlando	8	Auditing

May 18, 2017	8:30 am - 4:30 pm	Annual ERISA Update	ERISA Professionals	Withum - Dave Dacey & ERISA Niche Experts	Palace - Somerset, NJ	8	Auditing
July 18, 2017	8:30 am - 4:30 pm	Yellow Book/Not-for-Profit Update	NFP/Yellow Book Professionals	Withum - Cathy Bendall & NFP/YB Experts	Palace - Somerset, NJ	8	Auditing - Governmental
November 15, 2017	1:00 pm - 4:30 pm	Yellow Book	All FL Audit Staff	FICPA	TBD - FL	4	Auditing - Governmental
TBD	TBD	SEC Training	Staff who work on SEC Engagements	TBD	TBD	TBD	TBD
Fall TBD	TBD	Broker Dealers	Staff who work on Broker Dealer clients	Withum - TBD	TBD	TBD	TBD
June 21, 2017	8:00 am - 12:00 pm	Cross Border Tax 102	Tax Seniors - Managers	Withum - Chan Patel and Darko Naumoski	NJHA - 760 Alexander Road, Princeton, NJ	4	Taxes
June 21, 2017	1:00 pm - 5:00 pm	Cross Border Tax 202	Tax Managers - Partners	Withum - Chaya Siegfried and Ryan Babiak	NJHA - 760 Alexander Road, Princeton, NJ	4	Taxes

More Niche Training Coming Soon.....