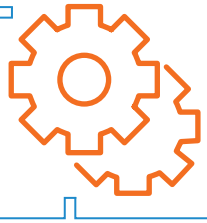


DEANDORTON UNIVERSITY

FY 2021

Determine your path.

WELCOME TO DEANDORTON UNIVERSITY

What is Dean Dorton University?

Dean Dorton University (DDU) is your one-stop-shop of internal training, learning, and development at Dean Dorton. This includes both the technical training that equips you to be successful in your role, as well as the essential skills you seek to grow and develop your professional career.

What is this catalog?

This catalog includes the program of courses offered this fiscal year through DDU. Please take the time to review the courses being offered. As part of your FY 2021 goal setting process, you will partner with your performance coach to discuss the courses for which you should register—based on your feedback, applicable learning paths, what you want to accomplish in FY 2021, and any continuing education requirements for certifications.

Table of Contents

REMINDER!

If you're a licensed CPA, you are required to obtain a certain number of CPE hours during your compliance period. This varies based on the state in which you are licensed, so please reference requirements that are applicable to you. If you have any questions about your compliance requirement, email Liz Young at eyoung@deandorton.com.

GETTING STARTED

As you determine your path of learning, here are a few steps to get you started.

STEP 1

Take a look at our FY 2021 DDU catalog! As you review, reference all courses and course descriptions for FY 2021 DDU.

Helpful hints:

- We encourage you to look at all sections of the DDU catalog—not just your own service group. We might offer a course that is designed for a specific service group in mind (e.g., Tax), but another team member (e.g., BCG) might find valuable—and vice versa! So when you're perusing the sections, please be sure you're looking at all of your options.
- Advertised CPE hours in the catalog are approximate and calculated based on scheduled times. However, we award CPE credit based on actual time spent in the classroom.
- What are Essential Skills courses? Essential skills are training opportunities that we all may need—no matter who we are or what role we play at Dean Dorton. These courses are reviewed annually and updated based on feedback from you. So, take a glance at our Essential Skills section and note courses that interest you!

STEP 2

Get prepared for FY 2021 goal setting. You'll partner with your performance coach to discuss DDU courses offered in FY 2021 and to finalize your training plan.

Learning paths

As you review the DDU catalog for courses, you will need to also reference any applicable learning paths. Learning paths are partnered with your career path, and are designed to guide you and your performance coach with required and elective courses you need to attend based on your level. A few items to consider:

- Learning paths are a guide and a starting place—please partner with your performance coach to finalize your specific training plan.
- Are you an Accounting and Business Compliance Services (ABS) team member? Please pay attention to the Associate learning paths within both ASG and Tax.

STEP 3

Read page 19 in its entirety after finalizing the FY 2021 DDU courses that you plan to attend.

Why is this important?

Through our Learning Management System (LMS), you are required to register yourself for DDU courses that you plan to attend in FY 2021. You will find important details and information to assist you with our LMS, Checkpoint Learning, on page 19.

STEP 4

Go to www.checkpointlearning.com, select your courses, and register through the LMS.

Note:

Almost immediately upon registering for a DDU course through the LMS, you will receive a registration confirmation email. It is very important to double click the .ics attachment of the email and add this time to your Outlook calendar. If applicable, please also add your training time to ProStaff.

AFO LEARNING PATH

Please reference your learning path below (if applicable) as you review the FY 2021 DDU Catalog.

Associate

REQUIRED

- ☐ Accounting for Start-Ups
- ☐ AFO Bi-Monthly Update
- ☐ Annual FY 2021 Professional Ethics Update
- ☐ Annual DeanDorton PM Roundtable – AFO
- ☐ Business Etiquette
- ☐ Cash Flow Statements
- ☐ Equine Accounting Training 101
- ☐ Financial Reporting
- ☐ Nonprofit Accounting Training
- ☐ Performance Management: New Hires
- ☐ Sage Intacct Dashboard and KPIs
- ☐ The Business of Dean Dorton

ELECTIVE

- ☐ Excel: Introduction, Intermediate, and Advanced
- ☐ Introduction to Caseview
- ☐ Introduction to QuickBooks
- ☐ Industry Team Breakfast and Learn Series
- ☐ Industry Training

Consultant

REQUIRED

- ☐ *Associate required training above*
- ☐ Controllership
- ☐ Equine Accounting Training 201

ELECTIVE

- ☐ Advanced Caseview
- ☐ Compilation Training
- ☐ Power BI Level I
- ☐ Power BI Level II

Senior Consultant

REQUIRED

- ☐ *Associate and consultant required training above*
- ☐ The Role of an Outsourced CFO

ELECTIVE

- ☐ Becoming a Business Advisor
- ☐ The Client Experience
- ☐ Train the Trainer

Don't forget Learning On Demand!

Check out page 13 for more information.

AFO

Accounting for Start-Ups

NEW

5/5/21

This course will cover a variety of accounting topics as they apply to start-ups, including efficient budget management, establishing and maintaining a bookkeeping system, understanding tax obligations, and modifying financial strategies when needed.

CPE: 2 hours

AFO Bi-Monthly Update

8/20/20 • 10/15/20 • 12/17/20
2/18/21 • 4/15/21 • 6/17/21

This bi-monthly meeting is for the AFO team to cover various technical and procedural updates.

CPE: Varies

Annual DeanDorton PM Roundtable – AFO

6/10/21

DeanDorton PM, a cloud-based project management solution, allows us to manage the status of client projects, assignments, and workflow. During this annual update, we will discuss latest uses for DeanDorton PM and share best practices.

CPE: 1 hour

Cash Flow Statements

NEW

12/2/20 • 5/12/21

In this course, you will learn how to prepare cash flow statements for our clients. We will also discuss and review how to build additional tools that assist clients who are monitoring cash needs.

CPE: 1.5 hours

Controllership

11/12/20

Learn the role of a Controller. What function do they play? How do they partner with Dean Dorton and our services? This course will give you a better understanding of the Controller role and how we can support our clients.

CPE: 1.5 hours

Equine Accounting Training 101

11/19/20

This training will cover a breadth of accounting topics focusing on specific needs of the equine industry. Topics include equine terminology, accounting methods and basis, and a timeline of equine accounting tasks.

CPE: 4.5 hours

AFO

Equine Accounting Training 201

11/19/20

This training is a continuation of Equine Accounting Training 101. In this more in-depth course, we will expand on accounting and financial outsourcing functions for clients within the equine industry.

CPE: 4.5 hours

Financial Reporting

8/6/20

Learn the various types of financial reporting and the process of completing reports for clients. You will also learn how to navigate Caseview, the software utilized for financial reporting preparation.

CPE: 1.5 hours

Nonprofit Accounting Training

10/28/20

This course covers accounting essentials for nonprofit and tax-exempt organizations. We will discuss financial statement reporting, as well as budgeting and resource allocation in addition to other accounting topics relevant to the nonprofit industry.

CPE: 4.5 hours

Sage Intacct Dashboard and KPIs

10/15/20 *(part of AFO bi-monthly update)*

For our clients, Sage Intacct financial dashboards are like the control panels that pilots use to fly an airplane. In this course, you will learn how to utilize key performance indicators (KPIs) in Sage Intacct to develop interactive, informative, and analytical dashboards.

CPE: 1.5 hours

The Role of an Outsourced CFO

9/24/20

As an outsourced accounting team, we often play the role of an outsourced CFO. Learn the function and role you play, and how we provide this service to our clients.

CPE: 1.5 hours

ASG LEARNING PATH

CALLING ALL ASG & ABS TEAM MEMBERS!

Please reference your learning path below (if applicable) as you review the FY 2021 DDU Catalog.

Associate

REQUIRED

- ☐ Active Data
- ☐ ASG Level 1
- ☐ ASG Technical Update
- ☐ Introduction to Caseview
- ☐ Introduction to EBP Audits
- ☐ Introduction to Single Audits
- ☐ The Five Ws of ASG Technologies
- ☐ Annual FY 2021 Professional Ethics Update
- ☐ Business Etiquette
- ☐ Performance Management: New Hires
- ☐ The Business of Dean Dorton

ELECTIVE

- ☐ Excel: Introduction, Intermediate, and Advanced
- ☐ Industry Team Breakfast and Learn Series
- ☐ Industry Training

Specialist

REQUIRED

- ☐ *Associate required training above*
- ☐ Accounting for Leases Under FASB 842 and GASB 87
- ☐ Advanced Caseview
- ☐ Annual EBP Update
- ☐ Annual Single Audit Update
- ☐ ASG Level 1.5
- ☐ Compilation Training
- ☐ IDEA Training
- ☐ RSM Orb Update
- ☐ RSM Level 2/RSM Level 3

ELECTIVE

- ☐ Controllership
- ☐ Power BI Level I
- ☐ Power BI Level II

Supervisor

REQUIRED

- ☐ *Associate and specialist required training above*
- ☐ On-the-Job Training: Tips and Tricks
- ☐ RSM Level 3/RSM Experienced In-Charge (EICC)
- ☐ Becoming a Business Advisor
- ☐ The Client Experience

ELECTIVE

- ☐ Train the Trainer

Don't forget Learning On Demand!

Check out page 13 for more information.

ASG

Accounting for Leases Under FASB 842 and GASB 87

NEW

6/14/21

This course will cover how to account for leases under both FASB 842 and GASB 87, including disclosure and audit considerations, as well as similarities and key differences between the two standards.

CPE: 3.5 hours

Active Data

7/13/20

This training will demonstrate the functionality of Active Data, including its audit applications used to efficiently mine and process data.

CPE: 3 hours

Advanced Caseview

10/26/20

Join us for an advanced discussion of formulas and formatting techniques used by Caseview in the preparation of more complex financial statements. This course will also include a roundtable discussion, so bring your Caseview questions to learn from your peers, as well as your favorite functionalities to share with your fellow team members.

CPE: 3.5 hours

Annual EBP Audit Update

4/23/21

Working on an employee benefit plan audit (EBP) this year? Get your required three hours of EBP training here! We will review any changes to RSM documents, as well as any changes to financial statement presentation, new accounting pronouncements, and other relevant changes to benefit plans. Best practices and common errors will also be discussed.

CPE: 3 hours

Annual Single Audit Update

6/7/21

This annual update will cover changes and reminders regarding the rules and regulations for single audits, including planning, new considerations under GASB, and updates for the current year.

CPE: 2 hours

ASG Level 1

4/26/21 • 4/27/21 • 4/28/21

Welcome to ASG! This course will introduce you to our audit practice and general accounting topics. In this training, you will learn the firm's audit methodology in a multitude of areas—from cash to payroll—using case studies, role playing, and discussions. This class also includes an introductory discussion of analytical procedures and their application.

CPE: Approximately 24 hours

ASG

ASG Level 1.5

12/7/20 • 12/8/20 • 12/9/20

In this advanced training, we will review the firm's methodology for more technical sections of an audit engagement, including inventory, goodwill/intangibles, debt, and leases. We will also discuss research tools, analytics, and introduce basic preparation of financial statements.

CPE: Approximately 24 hours

ASG Technical Update

5/14/21

During this annual update, we will cover service group administrative items, including processes and procedures, necessary technical updates, and any emerging trends.

CPE: Approximately 6 hours

Compilation Training

1/18/21

Do you prepare a compilation? If so, this training is for you! During this time, we will review firm processes regarding compilations, highlight best practices, and relay any necessary annual updates.

CPE: 1 hour

IDEA Training

11/16/20

This training will demonstrate the functionality of IDEA and its ability to efficiently mine and process data. We will discuss how to import data, manage a database, and how to conduct the sampling process.

CPE: 5 hours

Introduction to Caseview

7/27/20

In this training, we will discuss proper formatting of financial statements in Caseview. You will learn formatting functions, such as headers and footers, formulas for linking trial balances, and other concepts necessary for the preparation of basic financial statements.

CPE: 4 hours

Introduction to EBP Audits

4/23/21

This course is an introduction to employee benefit plan audits (EBPs). We will share a general overview of EBPs, discuss our methodology, and review specific workpapers used for testing.

CPE: 2 hours

ASG

Introduction to Single Audits

5/3/21

This training will cover the basics and general principles of single audit rules and regulations. During this time, we will discuss the nature of single audits, including what they are, why we do them, and what industries we serve.

CPE: 1 hour

RSM Orb Update

6/21/21

We have now been working in RSM Orb for a period of time. This course is an opportunity for us to reconvene and reflect on this implementation, share updates, and issue reminders as we continue to carry out the new audit methodology.

CPE: 3.5 hours

NEW

On-the-Job Training: Tips and Tricks

10/16/20

On-the-job training is extremely important for the audit team. This course, designed for supervisors and in-charges, will explore tips and tricks on how to effectively train team members while on audit engagements. We will also spend time in an open discussion hearing from participants to learn on-the-job training actions they have found successful.

CPE: 1.5 hours

NEW

The Five Ws of ASG Technologies

11/9/20

Every audit engagement and each client are unique in their own way. Let's spend time together discussing key ASG technologies to which we have access—from the *what* to the *why*. We will discuss what functionality each technology has, when to utilize technologies for specific situations, how various systems integrate with one another, and how they all come together to accomplish our audit methodology.

CPE: 4 hours

TAX LEARNING PATH

CALLING ALL TAX & ABS TEAM MEMBERS!

Please reference your learning path below (if applicable) as you review the FY 2021 DDU Catalog.

Associate

REQUIRED

- ☐ Tax Busy Season Update
- ☐ Tax Level 1
- ☐ Tax Level 1.5
- ☐ Tax Monthly Update: Associates, Specialists, and Supervisors
- ☐ Annual FY 2021 Professional Ethics Update
- ☐ Business Etiquette
- ☐ Introduction to QuickBooks
- ☐ Performance Management: New Hires
- ☐ The Business of Dean Dorton

ELECTIVE

- ☐ Equine Accounting Training 101
- ☐ Excel: Introduction, Intermediate, and Advanced
- ☐ Industry Team Breakfast and Learn Series
- ☐ Industry Training

Specialist

REQUIRED

- ☐ *Associate required training above*
- ☐ Advanced Caseware: Tax Roundtable
- ☐ Partnership Taxation
- ☐ Tax Basics of Retirement Income

ELECTIVE

- ☐ Equine Accounting Training 201
- ☐ Accounting for Start-Ups
- ☐ Nonprofit Accounting Training
- ☐ Compilation Training
- ☐ Power BI Level I
- ☐ Power BI Level II

Supervisor

REQUIRED

- ☐ *Associate and specialist required training above*
- ☐ Tax Research
- ☐ Becoming a Business Advisor
- ☐ The Client Experience

ELECTIVE

- ☐ Train the Trainer

Don't forget Learning On Demand!

Check out page 13 for more information.

TAX

Advanced Caseware: Tax Roundtable

12/11/20

In this roundtable, the tax team will learn tips and tricks about Caseware from one another. Bring your Caseware questions to learn from your peers, but also bring your favorite Caseware functionalities to share with your fellow tax team members.

CPE: 2 hours

Federal Tax Refresher

12/15/20

It's that time—busy season is headed our way. This course is designed for you to refresh your skills as you enter tax season. We will review federal tax guidelines, latest legislation, and other information to help equip you for the 2021 tax season.

CPE: 8 hours

Investment Transactions: Tax Reporting and Planning

12/4/20

This course will review the tax impact our clients face related to investment transactions. From employee stock options to publicly traded partnerships, we will detail tax reporting, compliance, and planning matters required for different types of investment transactions.

CPE: 7 hours

Partnership Taxation

11/10/20

This course will cover a multitude of topics around partnership taxation. From fundamental concepts to advanced tax planning strategies, this course discusses common transactions engaged in by LLCs and partnerships.

CPE: 8 hours

Tax Basics of Retirement Income

11/17/20

In this course, we will learn taxation matters related to retirement plans including IRAs, treatment of contributions and distributions, as well as a review of related forms (1099-R, 8606). We will also discuss strategies and ways to assist clients with common compliance and planning matters related to retirement income.

CPE: 2 hours

Tax Busy Season Update

1/8/21

Busy season is here! We will discuss administrative, software, and technical tax updates at this busy season kick-off meeting.

CPE: 6 hours

TAX

Tax Level 1

1/5/21 – 1/15/21

This training equips new hires and interns with the skills to prepare basic individual and business tax returns. Team members are introduced to individual and business tax topics, Dean Dorton tax processes and procedures, and various software utilized in the tax return preparation process.

CPE: Approximately 50 hours

Tax Level 1.5

8/11/20

Calling all alumni of Tax Level I! In this course, you'll regroup on tax processes, procedures, and software that you learned in Tax Level I. With at least one Dean Dorton tax season behind you, this time will be dedicated to revisiting certain concepts and materials to assist you with fall tax work and next tax season.

CPE: 8 hours

Tax Monthly Update: Associates, Specialists, and Supervisors

7/9/20 • 8/13/20 • 11/5/20 • 12/3/20
2/4/21 • 5/6/21 • 6/3/21

These monthly updates cover administrative matters, current developments, and technical updates.

CPE: 1 hour

Tax Monthly Update: Managers, Associate Directors, and Directors

7/7/20 • 8/11/20 • 11/3/20 • 12/1/20
2/2/21 • 5/4/21 • 6/1/21

These monthly updates cover administrative matters, current developments, legislative changes, and consulting topics.

CPE: 1 hour

Tax Research

6/11/21

Do you have the answers for all things tax? None of us do. In this class, we will equip you with the skills to research and locate answers to technical questions. We'll also have the opportunity to discuss appropriate sources and work with research platforms in this hands-on session.

CPE: 8 hours

ESSENTIAL SKILLS

NEW

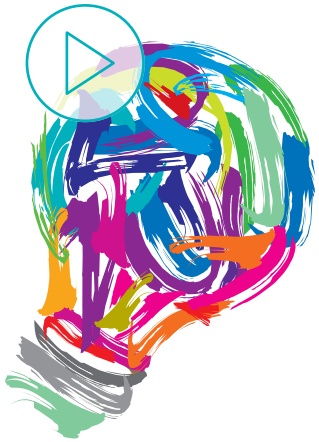
INTRODUCING LEARNING ON DEMAND!

We all know that the way—and how—we learn is changing. In addition to Dean Dorton's classroom learning that is offered on a fiscal year, we are proud to introduce our Learning On Demand platform!

What is Learning On Demand?

This platform contains a variety of training material delivered to you in video format—posted and always available so you can learn at a time and place that suits your schedule. This also allows you to learn at a point-of-need—so, if there is a course available for a topic you need help with, it is available at your fingertips.

Learning On Demand will include:



- Creating a Captivating PowerPoint
- ABCs of Dean Dorton's Retirement Plan and Planning for Retirement
- Billing 101: How to Bill at Dean Dorton
- Using Social Media to Enhance Your Career
- The Power of First Impressions
- Time Management
- Communication: Written and Verbal
- Various Technology Software
- and more!

We will post new Learning On Demand courses as they become available on the Intranet (Teams > HR > DDU > Learning On Demand) at the end of each quarter for your convenience.

ESSENTIAL SKILLS

Annual FY 2021 Professional Ethics Update

8/13/20 • 11/18/20 (Lexington)

8/20/20 • 11/20/20 (Louisville)

Are you a CPA? Get your required two hours of ethics here! We will review basic principles of the AICPA code of professional conduct, practice the ethical decision-making process, and review select specific rules of the code. Current national trends and enforcement actions, as well as CPE rules, will also be discussed.

CPE: 2 hours

Becoming a Business Advisor

NEW

1/19/21

In this course, you will learn the art of business advising. We will discuss common traits and attributes of trusted advisors, principles of relationship building, tips on enhancing credibility, and how to gain the trust of your client.

CPE: 3.5 hours

Business Etiquette

12/1/20 (Lexington) • 12/3/20 (Louisville)

Etiquette in the workplace is important for our daily interactions with team members, clients, and vendors. In this course, we will discuss proper etiquette in a variety of professional situations including face-to-face meetings, phone conversations, and business meals.

CPE: 3 hours

Excel: Introduction

8/19/20

In this introductory course, you will learn basic functions and formulas of Excel. We will discuss a variety of topics, including how to analyze, calculate, and present your data.

CPE: 2 hours

Excel: Intermediate

10/22/20

This intermediate course offers more advanced formatting techniques, such as applying special number formats, inserting and editing hyperlinks, sharing workbooks via email, protecting worksheets, and tracking changes in a workbook.

CPE: 2 hours

Excel: Advanced

11/11/20

In this course you will work with advanced functions and formulas in Excel. We will review lookup functions, data validation, and advanced data filtering. You will learn how to apply advanced chart formatting options, create more complex charts, and work with Pivot tables.

CPE: 2 hours

Introduction to QuickBooks

1/20/21

QuickBooks is a software utilized by many Dean Dorton clients. We will review uses and features in the preparation of client financial reports, discuss best practices of adjusting journal entries, and learn various functions in QuickBooks. This training will include information on printing reports, report customization tools, troubleshooting balancing issues, and efficiently finding errors.

CPE: 4.5 hours

ESSENTIAL SKILLS

Performance Management: New Coaches

12/7/20 • 5/21/21

Welcome to your new role as a Performance Coach! Come learn the tricks of the trade—from both HR and experienced coaches. We will discuss your responsibilities as a Performance Coach, while providing you with tools necessary to be successful.

Performance Management: New Hires

8/21/20 • 11/9/20 • 1/22/21 • 5/17/21

Welcome to the firm! We will spend time learning about our performance management philosophy, process, tools, and timeline.

NEW

Performance Management: Quarterly Breakfast Brainstorming Series

8/21/20 • 10/30/20 • 1/29/21 • 6/18/21

Calling all Performance Coaches! Join us for these quarterly sessions where we will discuss various topics related to performance management. Topics will include managing and leading high performers, giving continuous feedback, listening and the power of assumptions, and more!

NEW

Power BI Level I

7/22/20

Are you curious about the functionality of Power BI? This course will include a general overview of Power BI and Power Query Editor, with a focus on file/data transformation capabilities of each.

CPE: 1.5 hours

NEW

Power BI Level II

7/29/20

This deeper dive into Power BI will build off the first course and will walk you through performing the main tasks in creating a Power BI report. We will focus on creating tables, measures and relationships among data, developing visualizations, and publishing reports.

CPE: 2 hours

The Business of Dean Dorton

7/24/20 (Lexington) • 11/5/20 (Louisville)

Are you curious about how you make a difference and an impact at Dean Dorton? This is your opportunity to learn directly from our President and CEO. We will talk about scorecards, leveraging, productivity, and other factors that impact your success and that of Dean Dorton.

NEW

The Client Experience

5/7/21

The experience our clients receive from team members is pivotal to the growth of the firm. Let's spend time discussing the role of our client service professionals and how they can present themselves to our clients. We will discuss ways that our team members can ensure our clients receive the best experience from Dean Dorton and how that impacts the future of the firm.

CPE: 1 hour

Train the Trainer

7/30/20 • 7/31/20

Are you looking to play a key role as a trainer at Dean Dorton? Are you starting to provide on-the-job training to other team members? Learn best practices of facilitating, discover the various learning styles, and hear strategies for keeping your audience engaged.

CPE: 12 hours

BCG AND SUPPORT LEARNING PATH

Due to the unique nature of the roles and skill sets of the Business Consulting Group (BCG) and support teams, the learning path below is a great starting point for internal courses. You will also want to partner with your performance coach to develop and identify technical training that you should seek during FY 2021.

Associate

ELECTIVE

- ☐ Annual FY 2021 Professional Ethics Update
- ☐ Business Etiquette
- ☐ Excel: Introduction, Intermediate, and Advanced
- ☐ Introduction to QuickBooks
- ☐ Performance Management: New Hires
- ☐ The Business of Dean Dorton
- ☐ Industry Team Breakfast and Learn Series
- ☐ Industry Training
- ☐ *Appropriate AFO, ASG, and Tax technical training*

Consultant/Specialist

ELECTIVE

- ☐ Power BI Level I
- ☐ Power BI Level II
- ☐ *Appropriate AFO, ASG, and Tax technical training*

Senior Consultant/Supervisor

ELECTIVE

- ☐ Becoming a Business Advisor
- ☐ The Client Experience
- ☐ Train the Trainer
- ☐ *Appropriate AFO, ASG, and Tax technical training*

Don't forget Learning On Demand!
Check out page 13 for more information.

INDUSTRY

NEW

INTRODUCING THE INDUSTRY SECTION!

Industry Team Breakfast and Learn Series

Dean Dorton specializes in eight industries that comprise 66% of our entire firm revenue.

What does it mean to specialize? For these eight industries, we market ourselves as experts in all of the services we provide. This includes offering experts to serve clients in these areas, providing internal and external training opportunities, and focusing on marketing and business development efforts on these industries.

In this eight-part series, you will hear from each industry team leader, who will discuss Dean Dorton's holistic service approach to clients within their specialized industry. You will learn:

- Services we provide in these industries
- Ways we specialize
- Percent of firm revenue
- Clients we service
- How you can get involved

Have you been curious about the construction industry? Want to get more involved with higher education? Take this opportunity to learn more about your areas of interest, and equip yourself with a better knowledge of our firm's industry specialties!

Higher Education
7/24/20

Healthcare
10/23/20

Energy/Natural Resources
11/20/20

Manufacturing
12/18/20

Nonprofit
1/22/21

Construction
4/30/21

Real Estate
5/28/21

Equine
6/25/21

INDUSTRY

Accounting Fundamentals for the Construction Industry

11/2/20

This course will provide fundamental knowledge of accounting, auditing, and tax considerations for contractors and the construction industry. We will examine a variety of topics including types of contractors, accounting methods, revenue recognition, key audit risks, gain/fade analysis, and lookback.

CPE: 4.5 hours

Equine Industry Training

2/3/21

In this course we will spend time discussing basic equine facts—terminology, the life cycle of a Thoroughbred, and a timeline of the industry. In addition, we will cover technical aspects including depreciation, horse sale reporting, and SALT issues.

CPE: 2.5 hours

Healthcare Finance

11/4/20

This industry training will focus on hospital revenue cycle management, including the administrative functions associated with claims processing, payment, and revenue generation. We will also discuss how Dean Dorton uses benchmarking to learn where an organization is performing well against its peers and where it needs improvement.

CPE: 1 hour

Higher Education General Principles

5/3/21

Student financial aid auditing is a large part of Dean Dorton's audit practice. During this time, we will go into detail on auditing techniques, processes, and forms for student financial aid engagements.

CPE: 2 hours

Manufacturing Industry Training

12/18/20

In this training, we will discuss industry updates regarding tax credits, year-end tax planning matters, and other important topics related to manufacturing companies before we head into our year-end audits. We will also discuss new accounting standards and how they impact manufacturers.

CPE: 2 hours

Real Estate Training

1/28/21

In this course, you will broaden your understanding of real estate accounting. We will review the preferred accounting principles for the recording and reporting of real estate development, operations, and sales, including common construction accounting issues faced by real estate developers. You will also learn about passive activity limitations, like kind exchanges, involuntary conversions, and other real estate-related topics.

CPE: 2 hours

YOUR GUIDE TO CHECKPOINT LEARNING

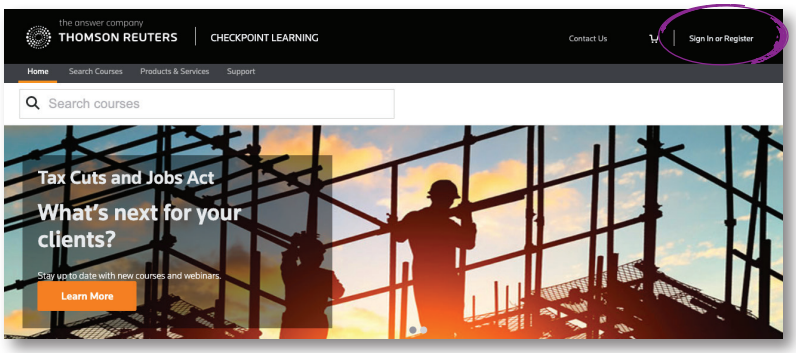
All team members utilize Checkpoint Learning, Dean Dorton's Learning Management System (LMS), to view available courses and register for classes they want or are asked to attend. Checkpoint Learning supports team members with training and continuing professional education (CPE) tasks.

Checkpoint Learning is an interactive tool built to support team members in executing their specific training needs, goals, and planning. This includes reviewing all internal CPE/training available, registering for internal courses found in this catalog, and tracking CPE hours toward certification requirements. Checkpoint Learning also serves to assist the firm administratively behind the scenes by generating sign-in sheets, creating calendar invitations with course offerings, sending training feedback surveys, and issuing internal CPE certifications—just to name a few. This guide shows you a few features on how you will utilize Checkpoint Learning.

Accessing the System

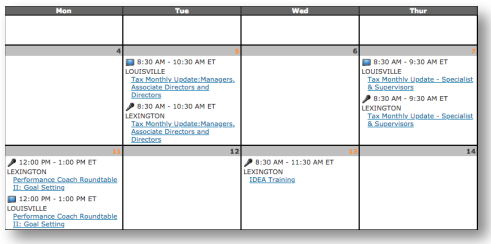
The link to Checkpoint Learning can be found under the Human Resources Team page of our Intranet. Or, go to www.checkpointlearning.com. Once on the home page, you have the ability to login to Dean Dorton's LMS.

Your username is your email address, and your password is "password" unless you've changed your password in your account. "Organization ID" is left blank.

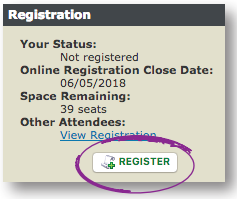


Registering for a Course

1. Once logged in, select the Homeroom tab (located at the top left of the screen, just beneath the Dean Dorton logo).
2. Scroll down to the "Live Learning" calendar at the bottom of the screen to view the available courses, and click on the course name to view its profile.
3. Once in the course profile, you will be able to see specific details, such as date, time, location, description, faculty, number of CPE hours (based on the scheduled time), etc.

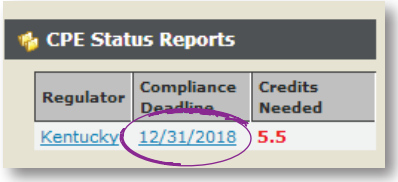


4. To register, simply click the "Register" button on the left panel of the webpage. You will then receive an email confirmation that includes details for the training.
5. To ensure the course is added to your Outlook calendar, you must open the .ics attachment of the email and save the calendar appointment.
6. Lastly, if applicable, make sure to update ProStaff.



Tracking Certification Requirements

You can also track your CPA license requirements in the LMS. From your Homeroom, under "CPE Status Reports" on the left panel, you can review the state in which you're licensed, the date by which you must have your required CPE, and the quantity of CPE credits you have left toward your requirement.



For a detailed listing of courses for you have received CPE credit, click the date under "Compliance Deadline."

Support

If you experience issues or need assistance with your LMS account, please email Liz Young at eyoung@deandorton.com.

NOTES

TIP!

Print this page, write DDU courses that you'd like to attend in FY 2021, and take this list with you when you meet with your performance coach to discuss goal setting.

QUESTIONS?

Liz Young
eyoung@deandorton.com
859.425.7776

Jeff Ricketts
jricketts@deandorton.com
859.425.7687