DEANDORTON

UNIVERSITY

FY 2022

WELCOME TO DEANDORTON UNIVERSITY

What is Dean Dorton University?

Dean Dorton University (DDU) is your one-stop-shop for 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 2022 goal setting process, you will partner with your advisor to discuss the courses for which you should register—based on your feedback, applicable DDU checklist, what you want to accomplish in FY 2022, and any continuing education requirements for certifications.

Table of Contents

Reminder!

Depending on your role at Dean Dorton, you may have CPE requirements. Please reference this video to see what is 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 2022 DDU catalog! As you review, reference all courses and course descriptions for FY 2022 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 it 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.

STEP 2

Get prepared for FY 2022 goal setting. You'll partner with your advisor to discuss DDU courses offered in FY 2022 and to finalize your training plan.

DDU Checklists

As you review the DDU catalog for courses, you will need to reference your applicable DDU checklist. Checklists are partnered with your career path, and are designed to guide you and your advisor with required and elective courses you need to attend based on your level. DDU checklists are a guide and a starting place – please partner with your advisor to finalize your specific training plan.

STEP 3

Read page 20 in its entirety after finalizing the FY 2022 DDU courses you plan to attend.

Why is this important?

Through our Learning Management System (LMS), you are required to register yourself for DDU courses you plan to attend in FY 2022. You will find important details and information to assist you with our LMS, Checkpoint Learning, on page 20.

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 the designated time to your Outlook calendar. If applicable, please also add your training time to ProStaff.

AFO

AFO Bi-Monthly Update

8/19/21 • 10/21/21 • 12/16/21
2/17/22 • 4/21/22 • 6/16/22

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

CPE: Varies

AFO Software: The More You Know

NEW

7/21/21

This course covers a variety of outsourced accounting software including NetSuite, Microsoft Dynamics, Bill.com, and more. We will review systems at a high level, discuss differences and similarities between systems, and learn how they interact together.

CPE: 1.5 hours

Financial Reporting & Cash Flow Statements

NEW

8/25/21

In this redesigned course, we will dive deeper into financial reporting. Topics include the various types of financial reporting, cash flow statements, and how to create interactive dashboards utilizing key performance indicators (KPIs).

CPE: 2 hours

The Accounting Process: A/P, A/R, and Cash Management

NEW

9/22/21

Do you want to learn how A/P, A/R, and cash management flow into the month-end accounting process? If so, this training is for you! During this time, we will discuss the workflow of these important accounting functions, any applicable checklists, and various software applications.

CPE: 1.5 hours

Controllership

11/11/21

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

11/17/21

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: 3 hours

AFO

The Role of an Outsourced CFO

3/16/22

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

CPE: 1.5 hours

Healthcare Accounting Training

5/18/22

This training will cover a breadth of everyday accounting and financial outsourcing functions for clients within the healthcare industry, including accounting concepts, monthly and year-end tasks, and healthcare revenue.

CPE: 2 hours

Annual AFO DeanDorton PM (Teamwork) Roundtable

6/9/22

DeanDorton PM (Teamwork), 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 the latest uses for DeanDorton PM and share best practices.

CPE: 1 hour

ASG

Active Data

7/12/21

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

CPE: 3 hours

NEW

Introduction to Financial Statement Drafting

7/30/21

In this training, you will learn the basics of drafting financial statements. We will discuss the concept of cross-review and go over best practices for ensuring that the numbers tie and the balance sheet reconciles. We will also discuss proper formatting of financial statements in Caseview—such as headers, footers, and formulas for linking trial balances.

CPE: 3.5 hours

NEW

REQUIRED

Improving Your Audit Engagements

7/30/21

Let's talk about improving our audits through efficiency and how that adds value. In this new course, we will provide an overview of tools that will increase your efficiency on audit engagements to help you reduce time and improve processes.

CPE: 3.5 hours

NEW

Introduction to Internal Audit and Fraud

10/18/21

This training will discuss the concepts of internal audits, including basic testing, analytics, and risk management. Additionally, we will show you how to identify fraud risks on actual invoices, purchase orders, and checks. We will also walk through the Internal Audit Caseware file.

CPE: 2 hours

NEW

Group Audits: A Refresher

10/25/21

Let's get together and discuss the audits of group companies! We will review how to apply group audit standards, RSM Orb forms, and consolidated & combined financial statements.

CPE: 1 hour

NEW

Review Engagements: Best Practices

11/15/21

Do you work on a review engagement? This class, a partner-course to our Improving Your Audit Engagements course, is designed to re-examine our processes as we perform review services.

CPE: 2 hours

ASG

ASG Level 2

12/1/21 - 12/3/21

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 discuss research tools, analytics, internal controls, and dive into more advanced Caseview functions.

CPE: Approximately 24 hours

On-the-Job Training: Tips and Tricks

12/1/21

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 hour

Annual EBP Audit Update

4/22/22

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

ASG Level 1

4/25/22 • 5/23/22 • 6/27/22

Welcome to ASG! In this three part course, we 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 will also include an introductory discussion of analytical procedures and their application.

CPE: Approximately 24 hours

Introduction to EBP Audits

4/26/22

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 work papers used for testing.

CPE: 2 hours

Introduction to Single Audits

5/2/22

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

ASG

Principles of Student Financial Aid Audits

5/2/22

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

Annual Single Audit Update

6/6/22

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

IDEA Training

Keep your eye out for IDEA training! To be scheduled in May or June of 2022, we will get together as a team to discuss the functionality of IDEA and how we utilize IDEA as an audit practice.

TAX

REQUIRED

Compilation Training for Tax Professionals:

Important: New CPE requirement for all tax professionals! You are now required to attend eight (8) hours of accounting or auditing CPE annually, for a total of 16 hours over the course of your compliance requirement (two year period). We are requiring compliance with this new requirement regardless of licensure status.

To meet this requirement, you will be assigned a four (4) hour RSM self-study course. In addition, you must attend four (4) hours of Audit/ASG and/or AFO courses found in the DDU catalog.

Click here to access the RSM self-study course.

- Is your CPA license an odd number (current reporting period = 1/1/2021 - 12/31/2022)? If so, our requirement starts now! You must complete your 8 hours of compilation training by 12/31/2021. And, you will have to complete your additional 8 hours (for a total of 16 hours) in calendar year 2022.
- Is your CPA license an even number (current reporting period = 1/1/2020 - 12/31/2021) or are you not a CPA? If so, your requirement starts with the next reporting period – starting on 1/1/2022. You will need to complete 8 hours of compilation training in both 2022 and 2023 calendar years (for a total of 16 hours).

Tax Monthly Update: Managers, Associate Directors, and Directors

7/6/21 • 8/3/21 • 11/2/21 • 12/7/21 • 2/1/22 • 5/3/22 • 6/7/22

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

CPE: 1 hour

Tax Monthly Update: Associates, Specialists, and Supervisors

7/8/21 • 8/5/21 • 11/4/21 • 12/9/21 • 2/3/22 • 5/5/22 • 6/9/22

These monthly meetings cover administrative matters, technical topics, and various updates.

CPE: 1 hour

Taxation of Corporations

7/13/21

This course is designed to guide tax practitioners through the numerous concepts and rules applicable to income tax accounting, tax return positions, and disclosures for C Corporations and S Corporations.

CPE: 8 hours

Estate and Trust Primer: The Basics

8/4/21

Ready to learn the basics of trusts and estates and how beneficiaries are treated? During this time, we will dive into the different types of trusts and estates, including a discussion of the tax implications of both.

CPE: 4 hours

TAX

Estate and Trust Primer: The Advanced

8/4/21

This course offers a deeper understanding of trusts and estates. We will review the effects certain tax scenarios have on the beneficiaries of those trusts and estates. We will also discuss planning ideas to help minimize tax during income accumulation, distribution, or the transfer of wealth to intended beneficiaries.

CPE: 4 hours

Tax Level 1.5

8/9/21 - 8/10/21

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: 12 hours

Multistate Tax: I Know What It Is, But Why Do I Care?

12/7/21

We have the answer! You care because there are over *12,000 taxing districts* in the U.S., and the possibility for errors are endless. This course will focus on income taxes imposed on corporations (C and S), individuals, and sales and use taxes. For income tax, expect all the regular suspects (nexus, business/nonbusiness income, and apportionment), plus a look at taxes not based on income. For sales and use tax, learn whether every type of business (manufacturer, wholesaler, distributor, and/or retailer) has nexus and how quickly nexus can be established.

CPE: 4 hours

Federal Tax Refresher

12/13/21

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 2022 tax season.

CPE: 8 hours

Investment Transactions: Tax Reporting and Planning

12/17/21

In this advanced course, we will review the high-level tax impacts 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: 3.5 hours

Investment Transactions: Tax Compliance

12/17/21

This course is designed to give our tax associates, specialists, and supervisors a better understanding of the "how to" related to investment transactions. We will discuss inputting information into tax preparation software, review the process for K-1's, and share cheatsheets/examples of investment transactions. *Note: for those attending this course, we ask that you also attend "Investment Transactions: Tax Reporting and Planning."*

CPE: 3.5 hours

TAX

Tax Level 1

1/5/22 - 1/21/22

This training will equip new hires and interns with the skills to prepare basic individual and business tax returns. Team members will be 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 Busy Season Update

REQUIRED

1/7/22

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

CPE: 6 hours

Accounting Methods and Periods

5/10/22

This course arms team members with an overview of factors to determine proper accounting methods (such as cash or accrual). In addition, you'll discuss accounting periods, and considerations for changes in the accounting period of an entity.

CPE: 4 hours

Tax Accounting for Inventories

5/10/22

In this course, we will detail methods of valuing inventory, including special rules for dealing with LIFO inventory. The effect of shrinkage, market factors, proposals to prohibit LCM and methods that include subnormal and wash-sale goods will also be discussed.

CPE: 4 hours

Choice of Entity

5/24/22

Calling all client advisors! This course will provide technical and soft skills techniques that you can utilize when assisting clients with choosing entities.

CPE: 2 hours

Taxation of Cryptocurrency

NEW

6/10/22

Cryptocurrency, also known as virtual or digital currency, is a relatively new medium of economic exchange. Join us in this introductory course where we will discuss the definition of cryptocurrency and review the tax implications for this new method of spending. We will also spend some time discussing the accounting differences between mining, investing, and trading cryptocurrency.

CPE: 2 hours

Tax Research

6/14/22

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

CPE: 8 hours

Basics of International Tax

6/21/22

This course introduces team members to U.S. tax implications of international activity, including a study of the treatment of outbound and inbound transactions for both businesses and individuals. We will also provide an introduction of various U.S. foreign reporting forms.

CPE: 2 hours

ESSENTIAL SKILLS

Train the Trainer

7/22/21 - 7/23/21

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 during our annual Train the Trainer.

CPE: 12 hours

NEW Annual FY 2022 Professional Ethics Update

Lexington: 8/3/21 • 12/15/21

Louisville: 8/5/21 • 12/16/21

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 rules of the code. Current national trends and enforcement actions, as well as CPE rules, will also be discussed.

CPE: 2 hours

Self-Awareness

8/6/21 • 11/5/21

Self-awareness is a critical component of any individual's emotional intelligence. This two-part session will host an in-depth conversation on self-awareness - what it means, your role in self-awareness, and strategies on being self-aware in the workplace. Led by The Oliver Group, we will also discuss and utilize the Predictive Index (PI) as a tool for self-awareness.

The First-Time Manager

10/29/21 • 11/4/21

Are you a first-time Manager? Did your title change to Manager for FY 2022? The transition to Manager is a pivotal shift in an individual's career. In this two session series, our first-time Managers will attend 'The First-Time Manager Experience' led by The Ken Blanchard Companies and offered through the Leadership Louisville Center. For Session 2, our first-time Managers will discuss the internal transition to Manager with leaders, hearing strategies for success, new expectations, and resources available to ensure a successful transition.

CPE: 10 hours

Introduction to Listening

Lexington: 11/19/21

Louisville: 12/10/21

Virtual: 12/14/21

Listening is one of the most important skills you can have. And, most of us listen with the intent to respond - rather than processing what is being said. During this course, we will introduce concepts of active listening, discuss listening barriers we encounter, and share techniques to improve your listening skills.

CPE: 1.5 hours

Compilation Training

1/24/22

Do you prepare, or work on, 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 hours

ESSENTIAL SKILLS

The Business of Dean Dorton

5/11/22

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

Dean Dorton: Best Practices in a Business Setting

6/24/22

In this moderated panel session, we will discuss strategies, tips, and tricks on how to navigate social situations in a business setting. Hear from fellow Dean Dorton peers on their experiences handling relationships, situations, and communication with both internal team members, as well as external clients and vendors.

CPE: 2 hours

Don't forget Learning On Demand!

Located on the HR page of the Intranet under DDU, you can find our Leaning On Demand series of courses, conversations, and training. Content is uploaded quarterly and covers a variety of topics—from technical topics, to essential skills—so we can all continuously keep learning.

INDUSTRY

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!

Construction
7/14/21

Higher Education
7/28/21

Nonprofit
8/19/21

Healthcare
10/22/21

Franchises
11/19/21

Manufacturing
12/15/21

Real Estate
6/3/22

Equine
6/24/22

INDUSTRY

Accounting Fundamentals for the Construction Industry

7/14/21

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: 2 hours

Nonprofit Training

8/19/21

Join us for our annual nonprofit industry training! Learn about the emerging trends in the nonprofit industry, how we can best support Dean Dorton nonprofit clients, and best practices for attracting new nonprofit clients. We will also spend time sharing relevant accounting, auditing (GASB and FASB), and tax updates.

CPE: 1 hour

Healthcare Finance

10/22/21

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

Manufacturing Industry Training

12/15/21

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

Equine Training

2/2/22

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: 3 hours

Real Estate Training

6/3/22

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: 1 hour

BUSINESS DEVELOPMENT

NEW

Introducing CORE!

Creating Opportunities to Really Engage (CORE) is a series of business development trainings and conversations for all Dean Dorton team members—no matter what your level is. So please join us for the session that corresponds to your experience, years in public accounting, and/or interest.

CORE 201: Years 3 and 4

8/6/21

As you begin to specialize in your career, whether through various industries or services, you are expected to participate in certain business development activities. What are those activities and how do I pick what best suits my interests in order to make an impact? You'll learn the answers along with strategies and tips for success from a panel of current Dean Dorton team members.

CPE: 1.5 hours

CORE 101: Years 1 and 2

8/20/21

How do we get new business? How do we find new clients while retaining current clients? What does my role have to do with it? In this course, we will provide you with an introduction to business development. We will discuss how to incorporate basic-level business development activities in your career beyond delivering exceptional client service. Concepts include creating your 20-second elevator speech, establishing your personal brand, and understanding the basic stages of the sales process.

CPE: 1.5 hours

The Client Experience 101

5/13/22

The experience our clients receive from team members is pivotal to the growth of our 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

NEW

The Client Experience 201: Partnering with NextGen Clients

6/17/22

Calling all alumni of The Client Experience 101! It is critical for client service professionals to examine the changing generation of clients. During this course, we will discuss your role in recognizing the emerging generation of clients, and how their wants, needs, and expectations differ from the sun-setting generation.

CPE: 1 hour

PERFORMANCE MANAGEMENT

Calling all team members!

Join us for our FY 2022 Owning Your Career Series.

Your Role in 'Owning Your Career'

NEW

8/13/21

You own your career! So, let's spend time together discussing how you can own your career at Dean Dorton. In this session, we will discuss strategies on how to own your career while setting realistic expectations for your future. We will also discuss resources available to you as a team member to ensure you are getting what you need.

Communicating Your Needs

NEW

11/8/21

How do you tell your advisor what you need? How do you hold your advisor accountable? What are your expectations for your advisor? Join us for a conversation, including a panel of team members, on how to effectively tell your advisor what you need from your Dean Dorton career.

Moving Your Career Forward

NEW

5/6/22

As we prepare for FY 2022 performance management season, let's connect to discuss ways to move your career forward. We will spend time discussing the importance of soft skills and technical skills, how to determine if you are promotion ready, and how you can use the career path to your advantage.

Calling all advisors!

Join our FY 2022 Advisor Conversation Series.

An Advisor's Role in 'Owning Your Career'

NEW

8/13/21

Team members own their careers at Dean Dorton. But, as advisors, we have a role to support them. During this time, we will get together as a group to discuss how we can support team members as they own their careers. We will also discuss how to bridge the gap between firm goals and team member career paths.

Advisor Expectations

NEW

ASG: 11/15/21

Tax: 11/16/21

Support: 11/16/21

BCG: 11/17/21

In this conversation, we will connect advisors and service group leaders. We will discuss service group expectations of advisors, and how advisors can partner with service group leaders to support a team member's career. We will also discuss barriers to supporting team members, as well as ways advisors and service group leaders can overcome those barriers.

PERFORMANCE MANAGEMENT

Performance Management: New Advisors

12/6/21 • 5/13/22

Welcome to your new role as an advisor! Come learn the tricks of the trade—from both HR and experienced advisors. We will discuss your responsibilities as an advisor, how you can effectively and realistically support your team members, and provide you with tools to be successful in this role.

Performance Management: New Team Members

5/16/22

Welcome to the firm! At Dean Dorton, team members own their careers. During this time, we will cover the roles and responsibilities between team members and their advisors. We will also discuss our annual performance management process and timeline. And, as a prerequisite to this course, you must watch our on-demand recording of 'Welcome to Performance Management!'

Stay tuned!

Additional performance management training will be made available in FY 2022! We will be posting on-demand videos during FY 2022 that will cover additional performance management topics.

HEALTHY YOU

Introducing Healthy You!

In this new DDU series, we will cover topics ranging from physical health to financial health! The focus is on YOU, the team member. Your well-being is our priority.

Sneak It In Series: Your Physical Wellness

8/16/21

Introducing our Sneak It In Series! During the course of a busy day, we all have an opportunity to sneak in short wellness activities. To kick off this series, we will hear from a certified fitness instructor who will share tips and tricks for getting in short exercises, stretches, and movement throughout a busy day. Following this virtual session, we will upload a series of 10-minute on demand videos that you can reference while you're on the go.

Your Well-Being: More than Just a State of Mind

Lexington: 1/21/22 • Louisville: 1/24/22
Virtual: 1/25/22

Here at Dean Dorton, we are all busy professionals. We live and manage our work lives every day, but we don't always take the time to focus on ourselves. Our wellness is comprised of not just physical, but also emotional and relational well-being. In this class, we will talk about the importance of self-care, how to acknowledge when we are struggling, and stress management tips and tricks. We will also discuss ways to strengthen our empathy with our fellow team members.

It's Your Money Series *presented by Charles Schwab*

Save Smarter

5/13/22

Saving is an important aspect of our overall financial picture. In this conversation, we will discuss how to save today in order to prepare for your future.

Spend Smarter

5/13/22

Let's spend our money smarter! During this time, we will share ideas to help you track your expenses, create a spending plan, and ways to watch out for debt.

Charles Schwab Resources

Check out other retirement resources! Charles Schwab hosts trainings and conversations throughout the year. Learn more here.

TECHNOLOGY

Technology Training Series - Applications and Programs

Technology is always evolving, and it can be difficult to keep up with the latest updates and trends. The technology that we use internally is a vital part of our business, and keeps our firm running smoothly and securely on a day-to-day basis. From communicating with team members, to sharing client information, and even tracking our time, keeping up with the latest features of our core programs is important to our business development.

This training series will provide all the latest information on our core technology applications that our firm uses every day. In this series, you will get a refresher on applications you haven't used in a while, and develop processes to help you be more efficient in programs you use every day!

Adobe
Introduction • 8/16/21 | AFO Session • 7/29/21
Audit Session • 10/25/21 | Tax Session • 11/18/21
CPE: 1 hour

Power BI
Part 1 & Part 2
Louisville • 8/17/21 | Lexington • 8/18/21
CPE: 3 hours

Webex Teams
8/16/21

Outlook
10/26/21

QuickBooks
11/18/21

iManage Filesite
12/9/21

Excel
1/18/22

Stay tuned!

The following technology trainings will be offered on demand, and will be available for your reference throughout the year!

Agilquest

ShareFile

Nexonia

YOUR GUIDE TO CHECKPOINT LEARNING

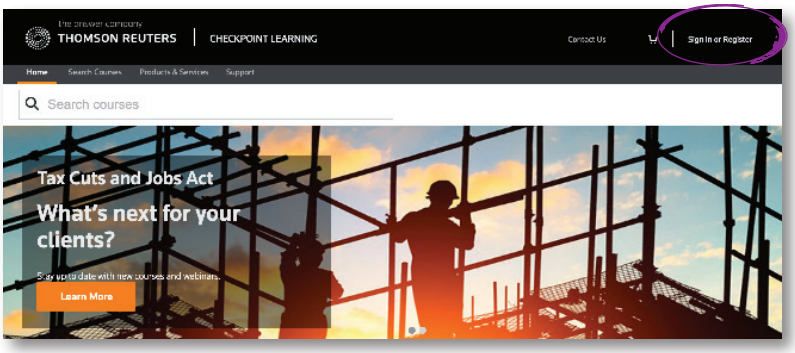
All team members utilize Checkpoint Learning, Dean Dorton's Learning Management System (LMS), to view available courses and register for classes they want or are asked to attend. Checkpoint Learning supports team members with training and continuing professional education (CPE) tasks. For more information on Checkpoint Learning, check out this 'How-To' video.

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

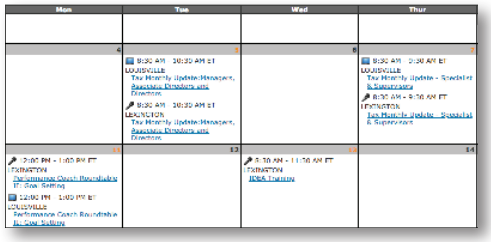
The link to Checkpoint Learning can be found under the Human Resources Team page of our Intranet. Or, go to www.checkpointlearning.com. Once on the home page, you have the ability to login to Dean Dorton's LMS.

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.

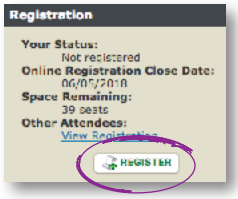


Registering for a Course

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.

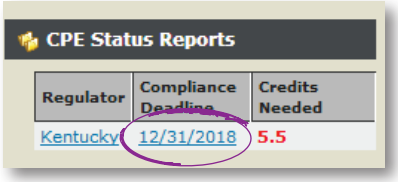


4. To register, simply click the "Register" button on the left panel of the webpage. You will then receive an email confirmation that includes details for the training.
5. To ensure the course is added to your Outlook calendar, you must open the .ics attachment of the email and save the calendar appointment.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

QUESTIONS?

Liz Young
eyoung@deandorton.com
859.425.7776