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# 2026–2027 Conference and Education Guide






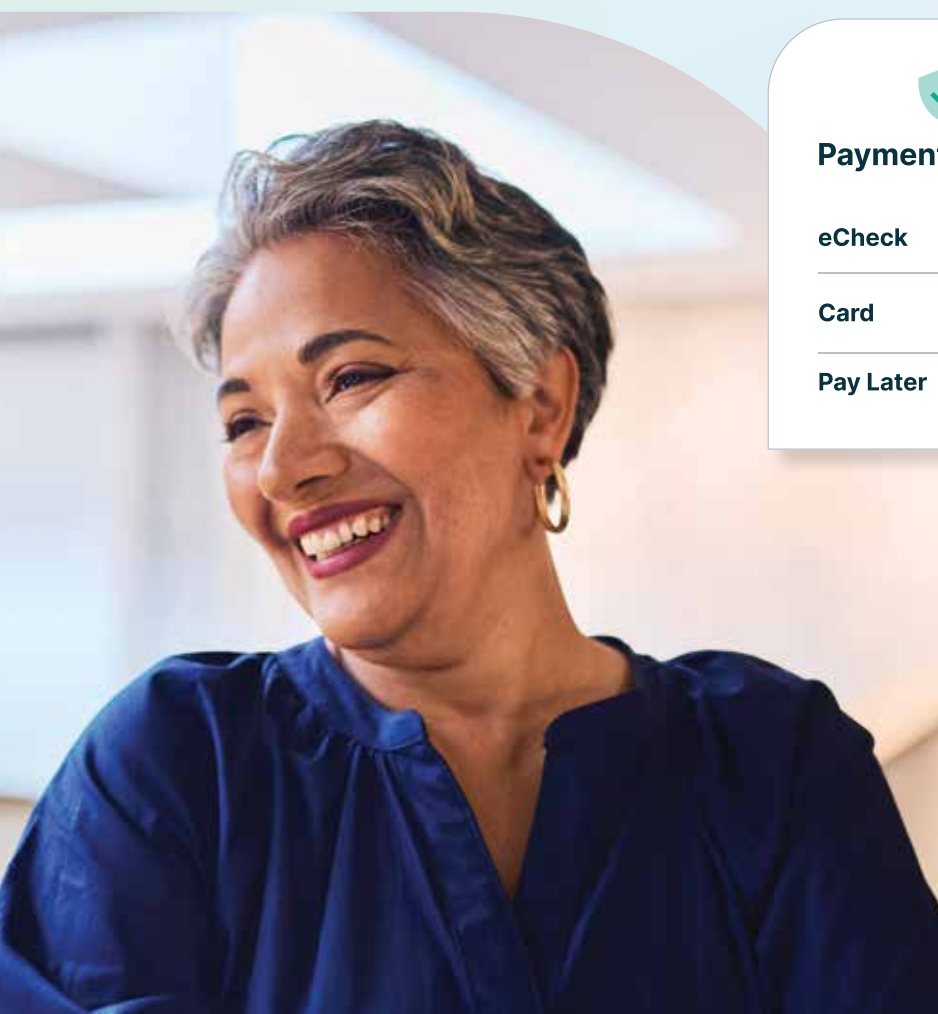
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# CPE Calendar

View and register for all our CPE offerings at [kycpa.org/cpe](https://kycpa.org/cpe).

The Kentucky Society of CPAs are pleased to offer a wide variety of programs and a variety of ways to participate in them. Virtual programs are real-time live events with online attendance. Nearly all seminars are virtual only. Hybrid events allow you

to choose to attend in person or online. We also have a few events that are for in-person attendance only.

**Contact the CPE department for group viewing instructions and with any questions at 502.266.5272 or at [cpe@kycpa.org](mailto:cpe@kycpa.org).**

## CPE discounts

**Early Bird Discount deadline:** Register at least 14 days in advance to receive a \$50 discount on most 8- and 16-hour conferences and seminars and a \$25 discount on most 4-hour seminars. Some events excluded—see [kycpa.org/cpe](https://kycpa.org/cpe) for complete pricing information.

**Get Smarter Discount:** Does not combine with Group Discount

KyCPA members only - Register for three or more 8-hour live seminars or conferences and save \$25 on each event. To receive the discount, you must register for all programs at the same time and pay in full at registration. **Deadline: September 30, 2026.**

**Group Discount:** Does not combine with Get Smarter Discount

Register 4 or more people from the same organization for the same program at the same time and save. (\$25 each registration on 8- or 16-hour seminars or conferences, call for group discount information on webcasts).

## JUNE

Date	Title	Begin (ET)	CPE Hours	Mbr Fee
6/29	<b>K2's New Technology Innovations Conference - VIRTUAL</b>	9:30 a.m.	8	424
6/30	K2's Excel Best Practices - VIRTUAL	10 a.m.	8	359
6/30	<b>2026 CPA Technology Conference - Higgins Advisory - VIRTUAL</b>	9 a.m.	8	424

## JULY

Date	Title	Begin (ET)	CPE Hours	Mbr Fee
7/1	K2's Securing Your Data – Practical Tools for Protecting Information -VIRTUAL	10 a.m.	4	219
7/1	K2's Next Level Home Networking - VIRTUAL	2:30 p.m.	2	135
7/1	K2's Taking A Fresh Look At Teams - VIRTUAL	5 p.m.	2	135
7/2	K2's Six Essential Teams Features - VIRTUAL	10 a.m.	2	135
7/6	K2's AI - Better Prompts, Better Results - VIRTUAL	10 a.m.	2	135
7/6	K2's Ten Must Know Features In Excel - VIRTUAL	3 p.m.	2	135
7/7	Supercharging Your Spreadsheet Collaboration - VIRTUAL	10 a.m.	2	135
7/7	K2's Data Analytics For Accountants And Auditors - VIRTUAL	12:30 p.m.	4	219
7/8	K2's Client Accounting Services For CPA Firms: Strategies For Growth AndSuccess - VIRTUAL	10 a.m.	2	135
7/8	Advanced Topics in Power BI - VIRTUAL	12:30 p.m.	2	135
7/8	K2's Ethics and Technology - VIRTUAL	3 p.m.	4	219

## JULY

Date	Title	Begin (ET)	CPE Hours	Mbr Fee
7/9	Practical Advice for Preventing Organizational Data Breaches - VIRTUAL	10 a.m.	2	135
7/9	Building Bulletproof Spreadsheets: When Accuracy Is Everything - VIRTUAL	4 p.m.	2	135
7/10	Complete Retirement Guide - VIRTUAL	9 a.m.	8	359
7/13	Easy Excel Automation with Tables & Power Query - VIRTUAL	10 a.m.	4	219
7/13	Google Workspace vs. Microsoft 365 – What's Right For Your Organization?- VIRTUAL	2:30 p.m.	2	135
7/13	Trump Savings - VIRTUAL	3 p.m.	1	90
7/14	Securing Confidentiality: Safeguarding Client Data Under IRS Rules -VIRTUAL	1:30 p.m.	2	135
7/14	QuickBooks Online Reporting: Beyond The Basics - VIRTUAL	10 a.m.	3	149
7/14	Tech Tips and Tricks for Excellent Video Conferences - VIRTUAL	4 p.m.	2	135
7/15	K2's QuickBooks Online For Accountants - VIRTUAL	10 a.m.	8	359
7/16	K2's Expense Reporting Automation - VIRTUAL	10 a.m.	2	135
7/16	K2's Taking Another Look At Power BI - VIRTUAL	12:30 p.m.	2	135
7/16	K2's Saving Time With Electronic Forms - VIRTUAL	3 p.m.	2	135
7/20	Connect, Transform, and Analyze Data Like a Pro with Power Query - VIRTUAL	10 a.m.	4	219
7/20	What's Coming Next: Technology Strategies for CPAs - VIRTUAL	2:30 p.m.	2	135
7/22	K2's The ABCs Of Automation With Microsoft's Power Platform - VIRTUAL	10 a.m.	2	135
7/22	K2's Formatting Excel Spreadsheets The Right Way - VIRTUAL	12:30 p.m.	2	135
7/22	K2's Better Reporting With QuickBooks Online - VIRTUAL	3 p.m.	2	135
7/23	K2's Business Intelligence, Featuring Microsoft's Power BI Tools - VIRTUAL	10 a.m.	8	359
7/23	Crypto Currency Tax Issues - VIRTUAL	12 p.m.	2	135
7/23	IRS Online Tools, Transcripts and IRS Notices - VIRTUAL	3 p.m.	2	135
7/23	Vehicle Deductions - VIRTUAL	9 a.m.	2	135
7/28	Excel Formula's Accountants & Financial Professionals Need to Know -VIRTUAL	2:30 p.m.	4	219
7/29	K2's Advanced Excel - VIRTUAL	10 a.m.	8	359
7/30	Supporting Mental Wellness to Thrive in Work and Life - VIRTUAL	10 a.m.	2	135
7/30	K2's What's New With QuickBooks - VIRTUAL	10 a.m.	2	135
7/30	K2's Excel Essentials for Staff Accountants - VIRTUAL	12:30 p.m.	8	359

## AUGUST

Date	Title	Begin (ET)	CPE Hours	Mbr Fee
8/3	Outlook and Teams: Collaboration Champions - VIRTUAL	10 a.m.	4	219
8/3	Creating Powerful and Effective Presentations with PowerPoint - VIRTUAL	2:30 p.m.	3	149
8/4	Leveraging Microsoft Teams Effectively For Your Organization - VIRTUAL	4 p.m.	3	149
8/5	K2's Excel Charting and Visualizations - VIRTUAL	10 a.m.	4	219
8/5	K2's Taking Another Look At PDFs - VIRTUAL	2:30 p.m.	2	135
8/5	Farm Taxation Update - VIRTUAL	8:30 a.m.	8	359

# AUGUST

Date	Title	Begin (ET)	CPE Hours	Mbr Fee
8/6	K2's Excel Tips, Tricks, and Techniques for Accountants - VIRTUAL	10 a.m.	8	359
8/10	Developing and Deploying Effective Cloud Cyber Security Best Practices For Your Organization - VIRTUAL	10 a.m.	2	135
8/10	K2's Top PDF Features You Should Know - VIRTUAL	12:30 p.m.	2	135
8/10	K2's Small Business Accounting Solutions - VIRTUAL	3 p.m.	2	135
8/10	Audits of Employee Benefit Plans Subject to ERISA - VIRTUAL	8:30 a.m.	8.5	359
8/11	Database Basics for Financial Professionals - VIRTUAL	2:30 p.m.	4	219
8/12	K2's Excel Best Practices - VIRTUAL	12:30 p.m.	8	359
8/12	<b>Members Only MEGA CPE Day - VIRTUAL (KYCPAFREE)</b>	9 a.m.	7	0
8/13	K2's Data Analytics For Accountants And Auditors - VIRTUAL	10 a.m.	4	219
8/13	K2's Excel's Best New Features - VIRTUAL	2:30 p.m.	2	135
8/17	K2's Building A Cutting-Edge Virtual Office - VIRTUAL	10 a.m.	4	219
8/17	How to Work Effectively from Anywhere! - VIRTUAL	12:30 p.m.	2	135
8/17	Turbo Charging Productivity with Artificial Intelligence and Automation -VIRTUAL	4 p.m.	4	219
8/18	You've Got This: An Intro to Yellow Book & Single Audits - VIRTUAL	1 p.m.	4	219
8/18	Professional Issues and Ethics Update - Louisville - HYBRID	1 p.m.	4	99
8/18	Preparing & Writing Findings in Yellow Book and Single Audits - VIRTUAL	8:30 a.m.	4	219
8/19	Making Sense of Essential OBBBA Provisions - VIRTUAL	1 p.m.	2	135
8/19	K2's CPA Firm Update - VIRTUAL	10 a.m.	2	135
8/19	K2's CRM - The Ultimate Business Automation Tool - VIRTUAL	12:30 p.m.	2	135
8/19	K2's Technology Update - VIRTUAL	3 p.m.	4	219
8/19	Review & Analysis of Crucial OBBBA Changes - VIRTUAL	8:30 a.m.	2	135
8/20	K2's Mastering Advanced Excel Functions - VIRTUAL	10 a.m.	4	219
8/20	K2's Ripped From The Headlines: Lessons From Interesting Tech Crimes -VIRTUAL	2:30 p.m.	2	135
8/20	Avoiding Deficiencies in Peer Reviews: Focus on Engagement Quality -VIRTUAL	8:30 a.m.	4	219
8/20	<b>Financial Institutions Conference - HYBRID</b>	8:30 a.m.	8	374
8/21	Guide to the AICPA Quality Management Standards - VIRTUAL	8:30 a.m.	2	135
8/24	Incident Response & Case Studies in AI Powered Cybersecurity - VIRTUAL	10:30 a.m.	2	135
8/24	What's Coming Next: Technology Strategies for CPAs - VIRTUAL	2:30 p.m.	2	135
8/24	Cybersecurity Risk Management for Financial Professionals - VIRTUAL	8:30 a.m.	2	135
8/24	<b>K2's Government Accounting Technology Conference - VIRTUAL</b>	9:30 a.m.	8	424
8/25	Hot Tech Tools and Services for Financial Professionals - VIRTUAL	10 a.m.	2	135
8/25	Microsoft 365 Mastery: When Everything Works Together - VIRTUAL	12:30 p.m.	2	135
8/25	Securing Confidentiality: Safeguarding Client Data Under IRS Rules -VIRTUAL	3 p.m.	2	135
8/25	Exploring Business Valuation Fundamentals - VIRTUAL	8:30 a.m.	2	135
8/26	K2's Taking Another Look At Power BI - VIRTUAL	10 a.m.	2	135
8/26	K2's Automation - Beyond The Basics With The Microsoft Power Platform -VIRTUAL	12:30 p.m.	2	135

# AUGUST

Date	Title	Begin (ET)	CPE Hours	Mbr Fee
8/26	K2's Getting Started With Artificial Intelligence - VIRTUAL	3 p.m.	2	135
8/27	K2's Case Studies in Fraud and Technology Controls - VIRTUAL	10 a.m.	8	359
8/27	IRA's, Roth's & Conversions - VIRTUAL	11 a.m.	3	165
8/27	Retirement Distributions, Penalties & Inheritances - VIRTUAL	2 p.m.	2	135
8/27	Audits of 401(k) Plans: New Developments & Critical Issues - VIRTUAL	8:30 a.m.	8	359
8/28	Business Pension Plans - VIRTUAL	10 a.m.	3	165
8/31	K2's AI - Security And Privacy Issues - VIRTUAL	10 a.m.	2	135
8/31	K2's Time To Advance Automation - VIRTUAL	12:30 p.m.	2	135
8/31	K2's Ethics and Technology - VIRTUAL	3 p.m.	4	219
8/31-9/1	Business Tax in Depth - 2-Day - VIRTUAL	9 a.m.	16	559

# SEPTEMBER

Date	Title	Begin (ET)	CPE Hours	Mbr Fee
9/1	K2's Top Ten Productivity Booster Apps in Microsoft 365 - VIRTUAL	10 a.m.	2	135
9/1	Privacy Issues And Solutions – What You Need to Know! - VIRTUAL	12:30 p.m.	2	135
9/1	K2's Data Security And Privacy Issues And Solutions - VIRTUAL	3 p.m.	2	135
9/2	K2's Excel Best Practices And Features - VIRTUAL	10 a.m.	2	135
9/2	K2's Best Word, Outlook, and PowerPoint Features - VIRTUAL	12:30 p.m.	4	219
9/2	LLC's & Partnerships in Depth - VIRTUAL	9 a.m.	8	359
9/3	K2's Small Business Internal Controls, Security, and Fraud Prevention and Detection - VIRTUAL	10 a.m.	8	359
9/8	K2's Excel Tips, Tricks, and Techniques for Accountants - VIRTUAL	10 a.m.	8	359
9/9	K2's Next Generation Excel Reporting - VIRTUAL	10 a.m.	8	359
9/10	Taxation of Tips and Overtime Under OBBBA - VIRTUAL	1 p.m.	2	135
9/10	Data Government and Privacy For Organizations - GDPR and CCPA - VIRTUAL	10 a.m.	2	135
9/10	Cybersecurity 2026 Defense for CPAs - VIRTUAL	12:30 p.m.	2	135
9/10	Demystifying Accounting for Blockchain, Cryptocurrency, and NFTs - VIRTUAL	3 p.m.	4	219
9/11	K2's Strategic Automation: Agentic AI Platform Applications - VIRTUAL	10 a.m.	2	135
9/11	Fraud in Today's Workplace: What Accountants Need to Know - VIRTUAL	12:30 p.m.	2	135
9/11	Charting, Graphing, and Mapping Data Made Easy! - VIRTUAL	3 p.m.	2	135
9/14	K2's Top PDF Features You Should Know - VIRTUAL	1:30 p.m.	2	135
9/14	Automation For Increasing Personal Efficiency and Effectiveness - VIRTUAL	10 a.m.	3	149
9/14	Database Basics for Financial Professionals - VIRTUAL	4 p.m.	4	219
9/15	The DIY Automation Revolution: Building Finance Solutions Without Code - VIRTUAL	10 a.m.	2	135
9/15	Data and Statistical Analytics Using Microsoft Excel - VIRTUAL	12:30 p.m.	3	149
9/15	Building Bulletproof Spreadsheets: When Accuracy Is Everything - VIRTUAL	4 p.m.	2	135
9/16	K2's Microsoft Teams - VIRTUAL	10 a.m.	2	135
9/16	Intro to Preparation Engagements - VIRTUAL	10:30 a.m.	2	135

# SEPTEMBER

Date	Title	Begin (ET)	CPE Hours	Mbr Fee
9/16	Supercharging Your Spreadsheet Collaboration - VIRTUAL	12:30 p.m.	2	135
9/16	Intro to Review Engagements - VIRTUAL	2 p.m.	2	135
9/16	K2's Implementing Internal Controls in QuickBooks Environments - VIRTUAL	3 p.m.	4	219
9/16	Introduction to Compilation Engagements - VIRTUAL	8:30 a.m.	2	135
9/17	Understanding Partnership Taxation: Types of Basis, Contributions and Distributions - VIRTUAL	1 p.m.	4	219
9/17	K2's Saving Time With Electronic Forms - VIRTUAL	10 a.m.	2	135
9/17	Eight Awesome PivotTable Features - VIRTUAL	12:30 p.m.	4	219
9/18	Section 754 Step-Up Basics: Understanding Tax Issues for Partnerships and LLCs	1 p.m.	2	135
9/21	Social Security & Medicare - VIRTUAL	10 a.m.	8	359
9/21	Winning Hearts and Minds: Building Future-Ready Businesses - VIRTUAL	2:30 p.m.	2	135
9/22	Simply Auditing Not-for-Profits Efficiently - VIRTUAL	1 p.m.	4	219
9/22	Excel Functionality That Every Accountant Should Know - VIRTUAL	10 a.m.	2	135
9/22	Getting Ahead of the Emerging Technology Curve: AI, Data Intelligence, and Digital Crypto Assets - VIRTUAL	2:30 p.m.	3	149
9/22	Small-Business Accounting, Audit, and Attest Update - VIRTUAL	8:30 a.m.	4	219
9/23	K2's Ten PDF Tips You Need To Know - VIRTUAL	10 a.m.	2	135
9/23	K2's Excel's Best New Features - VIRTUAL	2:30 p.m.	2	135
9/23-24	<b>CPAs in Business and Industry Conference 2-Day - HYBRID</b>	8 a.m.	16	499
9/24	What Tax Practitioners Need to Know About Medicare - VIRTUAL	1 p.m.	2	135
9/24	K2's Excel Tips - Today's Best Features - VIRTUAL	10 a.m.	2	135
9/24	K2's Next Level Home Networking - VIRTUAL	12:30 p.m.	2	135
9/24	K2's CPA Firm Update - VIRTUAL	3 p.m.	2	135
9/24	AI-Driven Ethics and Data Analytics: A Roadmap for Accountants - VIRTUAL	8:30 a.m.	4	219
9/25	Social Security: Dispelling Common Myths with Essential Truths - VIRTUAL	1 p.m.	2	135
9/25	Generative AI & Cybersecurity: Opportunities & Threats - VIRTUAL	8:30 a.m.	2	135
9/28	Turbo Charging Productivity with Artificial Intelligence and Automation - VIRTUAL	10 a.m.	4	219
9/28-29	Business Tax in Depth - 2-Day - VIRTUAL	10 a.m.	16	559
9/28	Cloud Computing for Accountants - VIRTUAL	2:30 p.m.	2	135
9/29	Excel Formula's Accountants & Financial Professionals Need to Know - VIRTUAL	10 a.m.	4	219
9/29	Easy Excel Automation with Tables & Power Query - VIRTUAL	2:30 p.m.	4	219
9/29	Advanced Audits of 401(k) Plans: Best Practices & Current Developments - VIRTUAL	8:30 a.m.	8	359
9/30	K2's Six Essential Teams Features - VIRTUAL	10 a.m.	2	135
9/30	K2's Tech Update - VIRTUAL	12:30 p.m.	2	135
9/30	The K2 Team's Top Tech Productivity Tips And Tricks - VIRTUAL	3 p.m.	2	135

# OCTOBER

Date	Title	Begin (ET)	CPE Hours	Mbr Fee
10/1	Professional Issues and Ethics Update - Northern KY - In-Person Only	1 p.m.	4	99
10/1	K2's AI - Security And Privacy Issues - VIRTUAL	10 a.m.	2	135
10/1	K2's Ten PDF Tips You Need To Know - VIRTUAL	12:30 p.m.	2	135
10/1	K2's Office Scripts – The New Macros - VIRTUAL	3 p.m.	2	135
10/5	<b>K2's Automation &amp; Workflow Productivity Conference - VIRTUAL</b>	9:30 a.m.	8	424
10/6	K2's Small Business Accounting Solutions - VIRTUAL	10 a.m.	2	135
10/6	<b>Tech Tips and Tricks for Excellent Video Conferences - VIRTUAL</b>	12:30 p.m.	2	135
10/6	Efficient Automation Solutions Using QuickBooks Online Advanced - VIRTUAL	3 p.m.	3	149
10/7	K2's Excel Best Practices And Features - VIRTUAL	10 a.m.	2	135
10/7	K2's Formatting Excel Spreadsheets The Right Way - VIRTUAL	12:30 p.m.	2	135
10/7	K2's Client Accounting Services For CPA Firms: Strategies For Growth AndSuccess - VIRTUAL	3 p.m.	2	135
10/8	K2's Excel Charting and Visualizations - VIRTUAL	10 a.m.	4	219
10/8	K2's Automation - Beyond The Basics With The Microsoft Power Platform -VIRTUAL	2:30 p.m.	2	135
10/12	Data Government and Privacy For Organizations - GDPR and CCPA - VIRTUAL	10 a.m.	2	135
10/12	Connect, Transform, and Analyze Data Like a Pro with Power Query - VIRTUAL	12:30 p.m.	4	219
10/13	An Accountant's Detailed Guide to Databases, Integration, and DataSharing - VIRTUAL	10 a.m.	2	135
10/13	Practical Advice for Preventing Organizational Data Breaches - VIRTUAL	12:30 p.m.	2	135
10/14	K2's Excel Essentials for Staff Accountants - VIRTUAL	12:30 p.m.	8	359
10/15	K2's The Best Kept Secrets Of Microsoft 365 - VIRTUAL	10 a.m.	2	135
10/15	Advanced Topics in Power BI - VIRTUAL	2:30 p.m.	2	135
10/16	The AI Revolution in 2026: What CPAs Need to Know - VIRTUAL	10 a.m.	2	135
10/19	Your Firm's Personal AI: Custom Copilots and GPTs That Know Your Business- VIRTUAL	10 a.m.	2	135
10/19	Outlook and Teams: Collaboration Champions - VIRTUAL	12:30 p.m.	4	219
10/19	Tax Planning for Rental Real Estate - VIRTUAL	8:30 a.m.	4	219
10/20	Excel Accounting Tools: Most Useful Formulas and Pivot Tables - VIRTUAL	1:30 p.m.	4	219
10/20	Data and Statistical Analytics Using Microsoft Excel - VIRTUAL	10 a.m.	3	149
10/20	Construction Contractors: Accounting & Financial ReportingIssues - VIRTUAL	8:30 a.m.	4	219
10/21	Key Partnership and S Corporation Tax Planning Strategies - VIRTUAL	1 p.m.	4	219
10/21	K2's After QuickBooks, What's Next - VIRTUAL	10 a.m.	2	135
10/21	K2's Best Word, Outlook, and PowerPoint Features - VIRTUAL	12:30 p.m.	4	219
10/21	Surgent's Individual Tax Planning Ideas - VIRTUAL	8:30 a.m.	4	219
10/22	Fraud in Single Audits - VIRTUAL	1 p.m.	4	219
10/22	K2's Data Analytics For Accountants And Auditors - VIRTUAL	10 a.m.	4	219
10/22	K2's Understanding Your Ransomware Risk - VIRTUAL	2:30 p.m.	2	135
10/22-23	<b>Ohio Valley Construction Conference - 2-Day - IN-PERSON ONLY</b>	8 a.m.	16	599

## OCTOBER

Date	Title	Begin (ET)	CPE Hours	Mgr Fee
10/22	Fraud Case Studies: Schemes & Controls - VIRTUAL	8:30 a.m.	4	219
10/23	AI 101 for CPAs: Core Concepts and Practical Applications - VIRTUAL	10 a.m.	2	135
10/23	Buying & Selling a Business: Tax & Structuring Overview - VIRTUAL	8:30 a.m.	4	219
10/26	Winning Hearts and Minds: Building Future-Ready Businesses - VIRTUAL	10 a.m.	2	135
10/26	Excel Functionality That Every Accountant Should Know - VIRTUAL	12:30 p.m.	2	135
10/26	The Big Beautiful Bill: Version 2 - VIRTUAL	8 a.m.	8	359
10/27	The Bottom Line on the Lease Accounting Requirements - VIRTUAL	1 p.m.	4	219
10/27	K2's Ripped From The Headlines: Lessons From Interesting Tech Crimes -VIRTUAL	10 a.m.	2	135
10/27	K2's Harnessing ChatGPT - VIRTUAL	12:30 p.m.	2	135
10/27-29	<b>Forensic and Valuation Services Conference - 3-Day - VIRTUAL</b>	2 p.m.	20	549
10/27	Interpreting the New Revenue Recognition - VIRTUAL	8:30 a.m.	4	219
10/28	Professional Issues and Ethics Update - Louisville - HYBRID	1 p.m.	4	99
10/28	K2's Excel PivotTables for Accountants - VIRTUAL	10 a.m.	4	219
10/28	K2's Securing Your Data – Practical Tools for Protecting Information -VIRTUAL	2:30 p.m.	4	219
10/29	K2's Small Business Internal Controls, Security, and Fraud Prevention andDetection - VIRTUAL	10 a.m.	8	359
10/29-30	1040 Tax in Depth - 2-Day - VIRTUAL	9 a.m.	16	559

## NOVEMBER

Date	Title	Begin (ET)	CPE Hours	Mgr Fee
11/2	K2's Top PDF Features You Should Know - VIRTUAL	10 a.m.	2	135
11/2	Essential Data Backup Strategies - VIRTUAL	12:30 p.m.	2	135
11/2	Demystifying Accounting for Blockchain, Cryptocurrency, and NFTs - VIRTUAL	3 p.m.	4	219
11/2-3	1040 Tax in Depth - 2-Day - VIRTUAL	8 a.m.	16	559
11/2	Federal Tax Update - Individuals - VIRTUAL	9 a.m.	8	359
11/3	Professional Issues and Ethics Update - Owensboro - In-Person Only	1 p.m.	4	99
11/3	Efficient Automation Solutions Using QuickBooks Online Advanced - VIRTUAL	1:30 p.m.	3	149
11/3	Automation For Increasing Personal Efficiency and Effectiveness - VIRTUAL	10 a.m.	3	149
11/4	K2's Case Studies in Fraud and Technology Controls - VIRTUAL	12:30 p.m.	8	359
11/4-5	Federal Tax Update with Ron Roberson - 2-Day - VIRTUAL	8 a.m.	16	559
11/5	Quality Management - Next Steps - In-Person Only	8 a.m.	7.5	374
11/5	K2's Six Essential Teams Features - VIRTUAL	10 a.m.	2	135
11/5-6	1040 Tax in Depth - 2-Day - VIRTUAL	10 a.m.	16	559
11/5	K2's Implementing Internal Controls in QuickBooks Environments - VIRTUAL	12:30 p.m.	4	219
11/6	<b>K2's Fall Artificial Intelligence Conference - VIRTUAL</b>	9:30 a.m.	8	424
11/9-10	1040 Tax in Depth - 2-Day - VIRTUAL	10 a.m.	16	559
11/10	Ethical Considerations for CPAs - VIRTUAL	8:30 a.m.	4	219

# NOVEMBER

Date	Title	Begin (ET)	CPE Hours	Mbr Fee
11/10	Introduction to Forensic Accounting - VIRTUAL	8:30 a.m.	4	219
11/10	2026 Tax Update - Baldwin	8:30 a.m.	8	219
11/11	Professional Issues and Ethics Update - Lexington - In-Person Only	1 p.m.	4	99
11/11	K2's Tech Update - VIRTUAL	10 a.m.	2	135
11/11	K2's Taking A Fresh Look At Teams - VIRTUAL	12:30 p.m.	2	135
11/11	K2's CPA Firm Update - VIRTUAL	3 p.m.	2	135
11/12	K2's Office Scripts – The New Macros - VIRTUAL	10 a.m.	2	135
11/12	K2's Automation - Beyond The Basics With The Microsoft Power Platform -VIRTUAL	12:30 p.m.	2	135
11/12	Federal Tax Update - Business & Individual - VIRTUAL	9 a.m.	8	359
11/12	1040 Tax in Depth - 2-Day - VIRTUAL	9 a.m.	16	559
11/13	Adapting to OBBBA Changes: A Strategic Review - VIRTUAL	8:30 a.m.	2	135
11/13	Federal Tax Update - Business - VIRTUAL	9 a.m.	8	359
11/16	What's Coming Next: Technology Strategies for CPAs - VIRTUAL	10 a.m.	2	135
11/16	K2's The New World of Expense Management: Smart Cards, Real-Time Tracking- VIRTUAL	12:30 p.m.	3	149
11/16	Charting, Graphing, and Mapping Data Made Easy! - VIRTUAL	4 p.m.	2	135
11/16-17	1040 Tax in Depth - 2-Day - VIRTUAL	8 a.m.	16	559
11/17	Accounting for Revenue Under ASC 606 & Final PIR ReportFindings - VIRTUAL	1 p.m.	2	135
11/17	Professional Issues and Ethics Update - Ashland - In-Person Only	1 p.m.	4	99
11/17	Leveraging Microsoft Teams Effectively For Your Organization - VIRTUAL	2:30 p.m.	3	149
11/17	Mastering Accounting for Income Taxes - VIRTUAL	8:30 a.m.	4	219
11/18	Tax Research - Intermediate Concepts - VIRTUAL	1 p.m.	2	135
11/18	K2's Technology for CPAs - Don't Get Left Behind - VIRTUAL	12:30 p.m.	8	359
11/18	Multistate Income Tax Issues - VIRTUAL	8:30 a.m.	4	219
11/19	The K2 Team's Top Tech Productivity Tips And Tricks - VIRTUAL	10 a.m.	2	135
11/19	K2's What's New With QuickBooks - VIRTUAL	12:30 p.m.	2	135
11/19	K2's Excel Charting and Visualizations - VIRTUAL	3 p.m.	4	219
11/19	<b>Commercial Real Estate Conference - HYBRID</b>	8 a.m.	8	374
11/19	Select Estate & Life Planning Issues for the Middle-IncomeClient - VIRTUAL	8:30 a.m.	4	219
11/20	Guide to Payroll Taxes and 1099 Issues - VIRTUAL	8:30 a.m.	4	219
11/23	K2's Improving Productivity With Microsoft 365/Office 365 CloudApplications - VIRTUAL	10 a.m.	4	219
11/23	K2's Formatting Excel Spreadsheets The Right Way - VIRTUAL	2:30 p.m.	2	135
11/23-24	1040 Tax in Depth - 2-Day - VIRTUAL	9 a.m.	16	559
11/24	The Most Critical Challenges in Not-for-Profit Accounting Today - VIRTUAL	1 p.m.	4	219
11/24	ChatGPT Deep-Dive Hands-on Bootcamp for CPAs - VIRTUAL	10 a.m.	2	135
11/24	K2's Excel's Best New Features - VIRTUAL	10 a.m.	2	135
11/24	K2's Mastering Advanced Excel Functions - VIRTUAL	12:30 p.m.	4	219

# NOVEMBER

Date	Title	Begin (ET)	CPE Hours	Mbr Fee
11/24	Best Practices in Not-for-Profit Accounting and Reporting - VIRTUAL	8:30 a.m.	4	219
11/25	K2's Ten PDF Tips You Need To Know - VIRTUAL	10 a.m.	2	135
11/25	K2's Excel Best Practices - VIRTUAL	12:30 p.m.	8	359

# DECEMBER

Date	Title	Begin (ET)	CPE Hours	Mbr Fee
12/1	Construction Contractors: Accounting, Auditing, and Tax - VIRTUAL	8:30 a.m.	8	359
12/2	Harnessing ChatGPT – Unlocking Professional Efficiency - VIRTUAL	3 p.m.	4	219
12/3	K2's Taking Another Look At Power BI - VIRTUAL	10 a.m.	2	135
12/3	K2's CRM - The Ultimate Business Automation Tool - VIRTUAL	12:30 p.m.	2	135
12/3	K2's Microsoft Teams - VIRTUAL	3 p.m.	4	219
12/4	Microsoft Copilot Deep Dive Hands-on Bootcamp for CPAs - VIRTUAL	1 p.m.	2	135
12/4	Google Gemini Deep Dive Hands-on Bootcamp for CPAs - VIRTUAL	10 a.m.	2	135
12/7	Are You Really Ready? Effective Disaster Recovery & Business Continuity Planning - VIRTUAL	10 a.m.	2	135
12/7	Tech Tips and Tricks for Excellent Video Conferences - VIRTUAL	12:30 p.m.	2	135
12/7	Building Bulletproof Spreadsheets: When Accuracy Is Everything - VIRTUAL	3 p.m.	2	135
12/8	Free and Open Source Technology For Your Organization - VIRTUAL	10 a.m.	2	135
12/8	Top Individual Tax Planning Strategies - VIRTUAL	10:40am	2	135
12/8	2025's Biggest Security and Privacy Concerns - VIRTUAL	12:30 p.m.	4	219
12/8	The Road Ahead: Critical OBBBA Changes Impacting Accounting & Finance Professionals - VIRTUAL	8:30 a.m.	2	135
12/9	K2's Data Security And Privacy Issues And Solutions - VIRTUAL	10 a.m.	2	135
12/9	Privacy Issues And Solutions – What You Need to Know! - VIRTUAL	12:30 p.m.	2	135
12/9	Supercharging Your Spreadsheet Collaboration - VIRTUAL	3 p.m.	2	135
12/9	Forms 7217 and 7203 - VIRTUAL	8:30 a.m.	2	135
12/10	K2's Ripped From The Headlines: Lessons From Interesting Tech Crimes -VIRTUAL	10 a.m.	2	135
12/10	K2's QuickBooks Online For Accountants - VIRTUAL	12:30 p.m.	8	359
12/10-11	2-Day Federal Tax Update With Ron Roberson - HYBRID	8 a.m.	16	579
12/10-11	Live Stream: Health Care Conference - 2-Day - VIRTUAL	9 a.m.	16	620
12/11	Virtual Currency: Keeping Up with the Tax Code - VIRTUAL	1 p.m.	2	135
12/11	This Year's Top Tax and Financial-Planning Ideas - VIRTUAL	8:30 a.m.	4	219
12/14	Database Basics for Financial Professionals - VIRTUAL	1:30 p.m.	4	219
12/14	QuickBooks Online Reporting: Beyond The Basics - VIRTUAL	10 a.m.	3	149
12/14	1040 Tax in Depth - 2-Day - VIRTUAL	8 a.m.	16	559
12/14	K2's Winter Excel Conference - VIRTUAL	9:30 a.m.	8	424
12/15	An Accountant's Detailed Guide to Databases, Integration, and DataSharing - VIRTUAL	10 a.m.	2	135
12/15	Payroll - Year End Compliance: W-2's and 1099's - VIRTUAL	12 p.m.	2	135
12/15	Hands On With QuickBooks Online Accountant (QBOA) for Public Accounting -VIRTUAL	2:30 p.m.	3	149

# DECEMBER

Date	Title	Begin (ET)	CPE Hours	Mbr Fee
12/15	IRS Reporting Maze: Tips, Overtime, QCD & W-2's - VIRTUAL	3 p.m.	2	135
12/15-16	2-Day Federal Tax Update with Ron Roberson - Fort Wayne VIRTUAL	8 a.m.	16	559
12/16	K2's The Best Kept Secrets Of Microsoft 365 - VIRTUAL	10 a.m.	2	135
12/16	K2's Harnessing ChatGPT - VIRTUAL	12:30 p.m.	2	135
12/16	K2's Time To Advance Automation - VIRTUAL	3 p.m.	2	135
12/17	Preparation, Compilation, and Review Engagements: Update and Review -VIRTUAL	1 p.m.	4	219
12/17	IRS Tax Examinations and Hot Issues - VIRTUAL	1 p.m.	4	219
12/17	Maximizing Your Social Security Benefits - VIRTUAL	1 p.m.	4	219
12/17	K2's Next Generation Excel Reporting - VIRTUAL	12:30 p.m.	8	359
12/17	Kentucky State Tax Conference - HYBRID	8 a.m.	8	374
12/17	Current Issues in Accounting and Auditing: An Annual Update - VIRTUAL	8:30 a.m.	4	219
12/17	Surgent's S Corporation, Partnership, and LLC Tax Update - VIRTUAL	8:30 a.m.	4	219
12/17	Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses - VIRTUAL	8:30 a.m.	4	219
12/18	Surgent's Individual Income Tax Update - VIRTUAL	1 p.m.	4	219
12/18	Ethical Considerations for CPAs - VIRTUAL	1 p.m.	4	219
12/18	The Essential Multistate Tax Update - VIRTUAL	1 p.m.	4	219
12/18	Agentic AI for CPAs: Automate Workflows With Intelligence - VIRTUAL	10 a.m.	2	135
12/18	Non-GAAP Financial Statement Options: Cash, Modified Cash and Tax Basis -VIRTUAL	8:30 a.m.	4	219
12/18	Annual FASB Update and Review - VIRTUAL	8:30 a.m.	4	219
12/18	Securing a Comfortable Retirement - VIRTUAL	8:30 a.m.	4	219
12/21	K2's Improving Productivity With Microsoft 365/Office 365 Cloud Applications - VIRTUAL	10 a.m.	4	219
12/21-22	1040 Tax in Depth - 2-Day - VIRTUAL	11 a.m.	16	559
12/21	Advanced Topics in Power BI - VIRTUAL	2:30 p.m.	2	135
12/22	K2's Collaboration Tools And Best Practices - VIRTUAL	10 a.m.	2	135
12/22	K2's Small Business Accounting Solutions - VIRTUAL	12:30 p.m.	2	135
12/22	K2's Understanding Your Ransomware Risk - VIRTUAL	3 p.m.	2	135
12/23	K2's Tax & Technology: Gearing Up for Your Best Busy Season - VIRTUAL	9:30 a.m.	8	424
12/28	K2's Excel PivotTables for Accountants - VIRTUAL	12:30 p.m.	4	219
12/29	K2's Ten Must Know Features In Excel - VIRTUAL	10 a.m.	2	135
12/29	Ethical AI Practices for CPAs: Ensuring Responsible Use - VIRTUAL	11 a.m.	2	135
12/29	K2's Next Level Home Networking - VIRTUAL	12:30 p.m.	2	135
12/29	K2's Taking Another Look At PDFs - VIRTUAL	3 p.m.	2	135
12/29-30	1040 Tax in Depth - 2-Day - VIRTUAL	9 a.m.	16	559
12/29-30	Business Tax in Depth - 2-Day - VIRTUAL	9 a.m.	16	559
12/30	K2's Business Intelligence, Featuring Microsoft's Power BI Tools - VIRTUAL	10 a.m.	8	359
12/30	Smarter Tax Services With Artificial Intelligence (AI) Tools - VIRTUAL	11 a.m.	2	135

# JANUARY 2027

Date	Title	Begin (ET)	CPE Hours	Mbr Fee
1/6-7/27	Federal Tax Update with Ron Roberson - 2-Day - VIRTUAL	8 a.m.	16	559
1/7-8/27	1040 Tax in Depth - 2-Day - VIRTUAL	10 a.m.	16	559
1/11-12/27	1040 Boot Camp - 2-Day - VIRTUAL	10 a.m.	16	559
1/14-15/27	1040 Tax in Depth - 2-Day - VIRTUAL	12 p.m.	16	559
1/14-15/27	2-Day Federal Tax Update With Ron Roberson - HYBRID	8 a.m.	16	579
1/18-19/27	1040 Tax in Depth - 2-Day - VIRTUAL	9 a.m.	16	559

## Members-Only Mega CPE Day

### One of the many benefits of KyCPA membership

KyCPA membership includes access to the Members-Only MEGA CPE Day on August 12. This is an exclusive virtual event created to help members stay informed, earn valuable CPE and maximize the value of their membership.

Designed exclusively for active KyCPA members, this annual event brings together expert speakers and timely topics in a convenient virtual format.

#### Why Attend?

- Earn up to seven hours of CPE included with your membership.
- Stay current on emerging issues affecting the accounting profession.
- Learn from trusted speakers and industry experts.
- Explore a variety of timely topics relevant to today's CPAs.
- Experience one of the many ways KyCPA invests in your professional success.

**Membership has its advantages. Mega CPE Day is just one of them.**

**Note:** Only those that have paid their 2026-2027 KyCPA membership dues before August 12, 2026, will be able to attend. Dues renewals will be sent July 1, 2026 and will be available to pay online at [kycpa.org](http://kycpa.org).

Visit [bit.ly/mega2026CPE](https://bit.ly/mega2026CPE) for more information and to register.



If you are not yet a KyCPA member, view additional member benefits and join today at [kycpa.org/why-join](http://kycpa.org/why-join).

# Conferences

## Specialized expertise conferences

**Financial Institutions** (Hybrid - Attend virtually or in-person - Gratz Education Center, Louisville)

August 20

*Critical updates for banking and financial services professionals*

Highlights:

- Regulatory developments
- Risk management
- Industry outlook

**Forensic and Valuation Services**

(Virtual)

October 27-29

*Where financial investigation meets expert analysis*

Develop specialized expertise that distinguishes you from the competition.

Highlights:

- Litigation support
- Business valuation
- Fraud examination
- Expert witness skills

**Commercial Real Estate** (Hybrid - Attend virtually or in-person - Gratz Education Center, Louisville)

November 19

*Navigate today's evolving real estate market*

Highlights:

- Market trends
- Tax implications
- Financing issues

**Ohio Valley Construction** (In-person only - Seelbach Hotel, Louisville)

October 22-23

The premier event is for construction industry professionals, CPAs and advisors serving the construction sector.

Highlights:

- Gain insights from nationally recognized economist Anirban Basu on the economic trends and market forces impacting the construction industry.
- Learn proven productivity and project management strategies from FMI Consulting's Greg Schoppman.
- Explore timely topics ranging from cybersecurity risks to contract negotiation best practices.
- Connect with construction industry peers, financial professionals and business leaders from across the Ohio Valley region.
- Earn 16 hours of CPE while enjoying a premier in-person experience at Louisville's historic Seelbach Hotel, including networking events, meals and a cocktail reception.





Participants listen as instructors present during the 2024 Ohio Valley Construction Conference.

### **Health Care** (Virtual)

December 10-11

*Stay current in a rapidly changing industry*

Highlights:

- Compliance
- Reimbursement
- Industry trends

### **Kentucky State Tax** (Hybrid - Attend virtually or in-person - Gratz Education Center, Louisville)

December 17

*Kentucky tax updates you can't afford to miss*

Highlights:

- Legislative changes
- Department of Revenue updates
- State-specific guidance

## CPAs in Business and Industry Conference

### **Lead. Influence. Drive Business Performance.**

(Hybrid - Attend virtually or in-person - Gratz Education Center, Louisville)

September 23-24

Ideal for CPAs working in business and industry; CFOs, controllers, internal auditors, finance managers and other accounting professionals.

This conference delivers practical insights and leadership strategies to help accounting and finance professionals navigate change, leverage emerging technologies and drive organizational success.

Highlights:

- Gain strategic insights for today's finance and accounting leaders.
- Explore emerging technologies and AI tools impacting finance functions.
- Learn best practices in risk management, leadership and business performance.
- Network with CFOs, controllers, finance directors and accounting professionals from across Kentucky.
- Discover practical solutions you can implement immediately within your organization.

## Technology and AI conferences

### **The future of accounting is here—and it's powered by technology.**

Artificial intelligence, automation, cybersecurity and emerging technologies are transforming the accounting profession. Today's CPAs must stay ahead of the curve to increase efficiency, provide greater value to clients and employers, and remain competitive in a rapidly evolving business environment.

Join nationally recognized experts and technology leaders as they explore the innovations transforming accounting, finance and business.

### **2026 CPA Technology**

June 30

Presented by Higgins Advisory

Why Attend?

- Compare ChatGPT, Google Gemini and Microsoft 365 Copilot to determine which AI tools best fit your needs.
- Learn practical applications of AI, data analytics and emerging technologies that can be implemented immediately.
- Discover how to automate workflows and boost productivity with AI-powered Excel and Microsoft 365.
- Stay ahead of technology trends shaping the future of accounting, tax and advisory services.

**These virtual technology and AI conferences provide practical insights and real-world solutions to help you:**

- Leverage AI tools to enhance productivity and decision-making
- Streamline workflows through automation and process improvements
- Strengthen cybersecurity awareness and risk management
- Maximize the power of Excel and other essential technologies
- Stay informed on emerging trends shaping the future of accounting
- Gain practical strategies you can implement immediately

**The following conferences are presented by K2 Enterprises:**

### **New Technology Innovations**

June 29

### **Government Accounting Technology**

August 24

### **Automation & Workflow Productivity**

October 5

### **Fall Artificial Intelligence**

November 6

### **Winter Excel**

December 14

### **Tax & Technology: Gearing Up for Your Best Busy Season**

December 23

# Featured courses

## Professional Issues and Ethics Updates

Register at [bit.ly/PIU2026KyCPA](https://bit.ly/PIU2026KyCPA).

### Stay Current. Stay Compliant.

4 CPE hours (Includes 2 hours of Ethics)

Designed specifically for Kentucky CPAs, this timely update explores professional responsibilities, ethical decision-making and emerging issues affecting the accounting profession.

### Why Attend?

- Fulfill Kentucky's ethics CPE requirement.
- Examine real-world scenarios and lessons learned from fraud and ethical failures.
- Stay informed on current issues affecting the CPA profession.

### Choose the location most convenient for you

- Louisville (Hybrid) – August 18
- Northern Kentucky (In-Person) – September 30
- Owensboro (In-Person) – October 30
- Louisville (Hybrid) – November 10
- Lexington (In-Person) – November 17
- Ashland (In-Person) – November 19

*All in-person attendees have the opportunity to connect during the networking break.*



Attendees at the 2025 Professional Issues and Ethics Update in Lexington connect during a networking break.



Participants listen as instructors present key updates and ethical considerations during the 2025 Professional Issues and Ethics Update in Ashland.

Register at [kycpa.org/cpe](https://kycpa.org/cpe)

# Federal Tax Updates with Ron Roberson

## The tax update CPAs count on



Stay ahead of the latest federal tax developments with one of the nation's most sought-after tax instructors. Ron Roberson has spent more than 20 years educating tax professionals across the

country, combining technical expertise, practical experience and a sense of humor that keeps attendees engaged from start to finish.

As a practicing tax professional, Ron brings real-world examples from his own firm to help make complex tax issues easier to understand and apply. His approachable teaching style and timely insights have made him a favorite among CPAs who return year after year.

### Why Attend?

- Learn the latest federal tax law developments affecting individuals and businesses.
- Gain practical insights from a speaker who works with tax clients every day.
- Understand complex tax issues through real-life examples and case studies.
- Receive timely guidance to help prepare for the upcoming filing season.
- Learn from one of the most popular and highly rated tax instructors in the profession.

Join Ron this tax season for the updates, insights and practical guidance you need to serve clients with confidence.

Register at [bit.ly/FTU2026Ron](https://bit.ly/FTU2026Ron).



### Virtual only options

**Federal Tax Update - Individual**  
November 2

**Federal Tax Update 2-Day**  
November 4-5  
December 15-16  
January 6-7, 2027

**Federal Tax Update - Business**  
November 13

**Federal Tax Update - Business & Individual**  
November 12

### Hybrid options

(Attend in-person or virtually)

**Federal Tax Update 2-Day**  
December 10-11  
January 14-15, 2027



A packed room, practical insights and the latest federal tax developments—Ron Roberson's Federal Tax Update consistently delivers the knowledge CPAs need to navigate a changing tax landscape. Join us this year and see why attendees return year after year.

# Quality Management: Next Steps

(In-person only - Gratzer Education Center, Louisville)

November 5 - Register at [bit.ly/QM2026NextSteps](http://bit.ly/QM2026NextSteps)



## Is your firm ready?

The new AICPA Quality Management Standards have transformed how firms approach quality, shifting from a traditional quality control model to a proactive, risk-based system of quality management. Firms are now expected to design, implement, document and monitor a customized quality management system tailored to their practice.

## Learn from the experts



Heather Lindquist, CPA  
Director of Peer Review & Professional Standards, Illinois CPA Society and member of the AICPA Peer Review Board's Technical Reviewer Advisory Task Force.



Paul Pierson, CPA  
Senior Director of Peer Review & Professional Standards, Illinois CPA Society, overseeing peer review administration for approximately 1,800 CPA firms across seven states, including Kentucky.

## What you'll gain

- Understand the latest quality management requirements and their impact on your firm.
- Learn practical steps for implementing and documenting your firm's system of quality management.
- Explore risk assessment, monitoring and remediation strategies that support compliance and quality improvement.
- Gain insights to help prepare for peer review and ongoing quality management responsibilities.
- Leave with actionable guidance you can apply immediately within your firm.

## Who should attend?

Partners, firm leaders, quality management leaders, peer review administrators, audit managers and professionals responsible for firm quality and compliance.

**Move beyond compliance and build a quality management system that strengthens your firm's future.**

## Exclusive savings on Surgent's Unlimited CPE Packages!



**More information and to purchase:**

[bit.ly/SurgentUnlimited](http://bit.ly/SurgentUnlimited)

**KyCPA members receive an exclusive 30% discount!**

**Member pricing:**

**Unlimited Plus Webinars:** \$625

**Unlimited Webinars:** \$520

**Unlimited Self-Study:** \$380

## Ready CPE

Ready CPE is KyCPA's on-demand platform, with more than 120 courses available individually or buy a \$299 subscription for KyCPA members (\$449 for nonmembers for access to them all!



**More information and to purchase:**

[bit.ly/ReadyCPEKyCPA](http://bit.ly/ReadyCPEKyCPA)

**Instructors include:** Melisa Galasso (YB), Jennifer Louis (A&A), Allison McLeod (Ethics), Steve Dilly and David Peters (Tax), Bryan Smith (Excel) and many more.



**Kentucky Society  
Certified Public Accountants**

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kycpa.org

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