



CFO University Course List

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Course Name	CPE Credits	Course Level
Accounting and Auditing Courses		
Auditing		
2006 Audit Update: SAS 102, 103 and 112	2	Update
Audit, Business and Financial Statement Risk Concepts	1	Basic
Audit Risk Assessment Standards: Building a Foundation <i>(recently updated)</i>	3	Basic
Audit Risk: Determining Audit Strategy	1	Basic
Audit Risk: Developing the Detailed Audit Plan	1	Basic
Audit Risk: Performing Assessment Procedures	1	Basic
Audit Risk: Understanding the Entity	1	Basic
Audit Sampling	7	Advanced
Audit Update: SAS 113 and 114	2	Basic
Audits of State and Local Governmental Units	8	Intermediate
Employee Benefit Plans II: Auditing Considerations	8	Intermediate
GAO Standards: Revised Yellow Book, 2008	7	Intermediate
Information Technology Auditing	8	Basic
Introduction to Bank Auditing and Accounting: I	8	Basic
Introduction to Bank Auditing and Accounting: II	9	Intermediate
OMB Circular A-133: The New Single Audit <i>(recently updated)</i>	6	Intermediate
PCAOB Auditing Standard No. 2	7	Basic
PCAOB Auditing Standard No. 3 and Rule 3101	1	Basic
Section 404 Working Paper Documentation - Using Risk Navigator	3	Basic
Section 404 Working Paper Documentation - Using Risk & Control Matrix	3	Basic
Controls		
Basics of Internal Control	1	Basic
Control Theory	1	Basic
Internal Controls for Auditors and Managers: Evaluation <i>(recently updated)</i>	8	Advanced
Process Theory	1	Basic
Financial Fundamentals		
Balance Sheet <i>(new course)</i>	2 ⁽⁴⁾	Basic

Course Name	CPE Credits	Course Level
Accounting and Auditing Courses		
Cash Flow <i>(new course)</i>	2 ⁽⁴⁾	Basic
Costing Decisions <i>(new course)</i>	2 ⁽⁴⁾	Basic
Income Statement <i>(new course)</i>	1.5 ⁽⁴⁾	Basic
Introduction to Financial Statements <i>(new course)</i>	1.5 ⁽⁴⁾	Basic
Financial Reporting		
SEC 1: Understanding the Securities and Exchange Commission	1	Basic
SEC 2: Periodic Reporting	5	Basic
SEC 3: Securities Registration	3	Basic
Understanding Financial Reports	1 ⁽³⁾	Intermediate
Using COSO in Complying with Sarbanes-Oxley	9	Intermediate
Financial Statements		
Analysis of the Balance Sheet <i>(new course)</i>	1.25 ⁽³⁾	Basic
Analysis of the Cash Flow Statement <i>(new course)</i>	1.25 ⁽³⁾	Basic
Analysis of the Income Statement <i>(new course)</i>	1.25 ⁽³⁾	Basic
Income Statement <i>(new course)</i>	1.5 ⁽⁴⁾	Basic
Financial Statements – Ratio Analysis	2 ⁽³⁾	Intermediate
Introduction to Financial Statements – 1) A Balancing Act: The Balance Sheet	1	Basic
Introduction to Financial Statements – 2) Tracking the Operation: The Income Statement	1	Basic
Introduction to Financial Statements – 3) The Power of Cash: The Cash Flow Statement	1	Basic
Preparing Personal Financial Statements	6	Intermediate
Understanding and Analyzing Financial Statements <i>(recently updated)</i>	5	Basic
Fraud		
Computer Fraud: Detection and Deterrence	9	Basic
Fraud I: Prevention	8	Basic
Fraud II: Detection	8	Basic
Fraud III: Auditing	8	Intermediate
SAS 99: Consideration of Fraud in a Financial Statement Audit	8	Basic

Course Name	CPE Credits	Course Level
Accounting and Auditing Courses		
General		
Activity-Based Costing (ABC)	8	Intermediate
Fair Value Measurement: An Introduction to SFAS No. 157	2	Basic
Introduction to ABM <i>(new course)</i>	1 ⁽⁴⁾	Basic
Introduction to Activity-Based Costing <i>(new course)</i>	1 ⁽⁴⁾	Basic
Introduction to Business Valuation and Use of Comparables <i>(recently updated)</i>	1	Basic
Moving to ABM <i>(new course)</i>	1.5 ⁽⁴⁾	Basic
Total Cash Management	8	Basic
Traditional Costing and ABM <i>(new course)</i>	1 ⁽⁴⁾	Basic
Valuation Concepts and Derivative Instruments	4	Advanced
Valuation Methods: The Adjusted Net Assets Method	2	Basic
Valuation Methods: The Excess Earnings (Treasury) Method	2	Basic
Valuation Methods: The Income Approach	2	Basic
International GAAP		
International GAAP – Agriculture – IFRS	1.75 ⁽²⁾	Basic
International GAAP – Cash Flow Statements – IFRS	2 ⁽²⁾	Basic
International GAAP – Earnings per Share – IFRS	1.75 ⁽²⁾	Basic
International GAAP – Employee Benefits – IFRS	2 ⁽²⁾	Basic
International GAAP – Financial Instruments 1: Introduction to Financial Instruments – IFRS	1.5 ⁽²⁾	Basic
International GAAP – Financial Instruments 2: Accounting for Financial Instruments – IFRS	3 ⁽²⁾	Basic
International GAAP – First-time Adoption of IFRSs – IFRS	3 ⁽²⁾	Basic
International GAAP – Foreign Currency and Hyperinflation – IFRS	2 ⁽²⁾	Basic
International GAAP – Group Accounts 1: Business Combinations – IFRS	2 ⁽²⁾	Basic
International GAAP – Group Accounts 2: Classification of Investments – IFRS	3.25 ⁽²⁾	Basic
International GAAP – Impairment of Assets – IFRS	2.5 ⁽²⁾	Basic
International GAAP – Income Taxes and Deferred Tax – IFRS	2 ⁽²⁾	Basic
International GAAP – Intangible Assets – IFRS	2 ⁽²⁾	Basic

Course Name	CPE Credits	Course Level
Accounting and Auditing Courses		
International GAAP – Introduction to Financial Reporting Under IAS 1 – IFRS	2 ⁽²⁾	Basic
International GAAP – Introduction to IFRS and IASB – IFRS	1.5 ⁽²⁾	Basic
International GAAP – Inventories and Construction Contracts – IFRS	1.75 ⁽²⁾	Basic
International GAAP – Leases – IFRS	3 ⁽²⁾	Basic
International GAAP – Performance Reporting and Accounting Changes – IFRS	2 ⁽²⁾	Basic
International GAAP – Property, Plant & Equipment & Capitalisation of Borrowing Costs – IFRS	2.5 ⁽²⁾	Basic
International GAAP – Provisions, Contingent Liabilities and Contingent Assets – IFRS	1.5 ⁽²⁾	Basic
International GAAP – Related Party Disclosures – IFRS	1.25 ⁽²⁾	Basic
International GAAP – Revenue Recognition – IFRS	2 ⁽²⁾	Basic
International GAAP – Share-based International Payment – IFRS	2.5 ⁽²⁾	Basic
Introduction to International Financial Reporting Standards	2	Advanced
Operational Analysis		
Asset Turnover (<i>new course</i>)	2 ⁽⁴⁾	Basic
Introduction to Financial Analysis (<i>new course</i>)	.5 ⁽⁴⁾	Basic
Investment Appraisal (<i>new course</i>)	2.5 ⁽⁴⁾	Basic
Profit Margin (<i>new course</i>)	1.5 ⁽⁴⁾	Basic
Return on Capital Employed (<i>new course</i>)	2.5 ⁽⁴⁾	Basic
Strategic Analysis		
Dividends and Growth (<i>new course</i>)	2 ⁽⁴⁾	Basic
Introduction to Shareholder Value (<i>new course</i>)	1 ⁽⁴⁾	Basic
Return on Equity (<i>new course</i>)	2 ⁽⁴⁾	Basic
U.S. GAAP		
Accounting – An Introduction	1 ⁽³⁾	Basic
Accounting Basics for Finance Professionals (<i>new course</i>)	1.25 ⁽³⁾	Basic
Accounting and Auditing Real Estate Transactions	6	Intermediate
Accounting for Derivatives and Hedging Activities (Through SFAS 150)	8	Intermediate
Accounting for Income Taxes (FASB 109)	9	Intermediate

Course Name	CPE Credits	Course Level
Accounting and Auditing Courses		
Accounting for Investments: Equity, Including Consolidations <i>(new course)</i>	4	Basic
Accounting for Leases	8	Intermediate
Accounting for Liabilities	9	Intermediate
Accounting for Pensions	7	Intermediate
Accounting for Share-Based Compensation (SFAS 123R) <i>(recently updated)</i>	8	Intermediate
Business Combinations, Goodwill, and Other Intangible Assets	4	Intermediate
Cash Flows (FASB 95)	4	Intermediate
Compilation and Review	8	Intermediate
Comprehensive Income: SFAS 130	2	Basic
Earnings per Share – Basic	1	Basic
Earnings per Share (SFAS 128)	3	Basic
Employee Benefit Plans I: Accounting Principles	8	Basic
FASB 154: Accounting Changes and Error Corrections	1	Basic
FASB Update <i>(recently updated)</i>	8	Update
FIN 46(R): Consolidation of Variable Interest Entities	3	Basic
FIN 48: Accounting for Uncertainty in Income Taxes	2	Basic
Forensic Accounting	5	Basic
GASB 34: Basic Financial Statements for State & Local Governments	8	Advanced
Impairment or Disposal of Long-Lived Assets (SFAS 144)	4	Basic
Other Topics for the Equity Method and Consolidations <i>(new course)</i>	1	Basic
Revenue Recognition: Fundamentals	2	Basic
Segment Accounting and Reporting	2	Basic
Strategic Transactions	2	Intermediate
Structuring Series: Accounting for Income Taxes in Business Combinations	2	Intermediate
Structuring Series: Accounting for Recap Transactions	2	Intermediate
Structuring Series: Purchase Accounting	3	Intermediate

Ethics Courses

Making Ethical Decisions (<i>recently updated</i>)	8	Basic
Moral Leadership and Character Development	5	Basic

Course Name	CPE Credits	Course Level
Finance Courses		
Bank Lending		
Collateral and Credit Risk Mitigation (Part I) <i>(new course)</i>	1 ⁽³⁾	Intermediate
Collateral and Credit Risk Mitigation (Part II) <i>(new course)</i>	1 ⁽³⁾	Intermediate
Lending – An Introduction <i>(new course)</i>	1.25 ⁽³⁾	Basic
Loan Trading <i>(new course)</i>	1 ⁽³⁾	Intermediate
Syndicated Lending <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
The Lending Cycle <i>(new course)</i>	1 ⁽³⁾	Basic
Bank Treasury Management		
Asset and Liability Management (ALM) – An Introduction <i>(new course)</i>	1.5 ⁽³⁾	Basic
Asset and Liability Management (ALM) – Interest Rate Risk <i>(new course)</i>	1.5 ⁽³⁾	Basic
Asset and Liability Management (ALM) – Options, FTP and Firm Value <i>(new course)</i>	1.5 ⁽³⁾	Advanced
Treasury – Dealing Room Organization and Practices <i>(new course)</i>	1 ⁽³⁾	Basic
Treasury Management – The Finances of a Bank	1 ⁽³⁾	Intermediate
Treasury Management – The Treasury Department	1 ⁽³⁾	Basic
Budgeting and Financial Management		
Budgeting – An Introduction <i>(new course)</i>	1 ⁽³⁾	Basic
Cash Management	1.5 ⁽³⁾	Intermediate
Credit Management	1 ⁽³⁾	Intermediate
Financial Planning	2 ⁽³⁾	Intermediate
Preparing and Controlling a Budget <i>(new course)</i>	1.5 ⁽³⁾	Basic
Working Capital Management	1 ⁽³⁾	Intermediate
Building Blocks		
Calculus	1 ⁽³⁾	Advanced
Correlation and Regression Analysis <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Distributions and Hypothesis Testing <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Estimating Volatility	1.25 ⁽³⁾	Intermediate
Indices, Exponents, Logs and Geometric Series <i>(new course)</i>	1.25 ⁽³⁾	Basic
Interest Calculations <i>(new course)</i>	1.25 ⁽³⁾	Basic

Course Name	CPE Credits	Course Level
Finance Courses		
Net Present Value & Internal Rate of Return	1 ⁽³⁾	Basic
Probability (<i>new course</i>)	1 ⁽³⁾	Intermediate
Time Value of Money (<i>new course</i>)	1 ⁽³⁾	Basic
Collective Investment Schemes (UK)		
Collective Investment Schemes (UK) (<i>new course</i>)	1 ⁽³⁾	Basic
Investment Trusts (UK) (<i>new course</i>)	1 ⁽³⁾	Basic
Open-Ended Investment Companies (OECs) (UK) (<i>new course</i>)	1 ⁽³⁾	Basic
Unit Trusts (UK) (<i>new course</i>)	1 ⁽³⁾	Basic
Commodities		
Commodities – Agricultural (<i>new course</i>)	1.5 ⁽³⁾	Basic
Commodities – An Introduction	1.5 ⁽³⁾	Basic
Commodities – Base Metals (<i>new course</i>)	1.5 ⁽³⁾	Basic
Commodities – Electricity and Coal (<i>new course</i>)	1 ⁽³⁾	Basic
Commodities – Emissions (<i>new course</i>)	1.25 ⁽³⁾	Basic
Commodities – Natural Gas (<i>new course</i>)	1.25 ⁽³⁾	Basic
Commodities – Oil (<i>new course</i>)	1.5 ⁽³⁾	Basic
Commodities – Precious Metals (<i>new course</i>)	1.5 ⁽³⁾	Basic
Corporate Finance		
Corporate Finance – Acquisition Analysis (<i>new course</i>)	1.25 ⁽³⁾	Intermediate
Corporate Finance – An Introduction	1 ⁽³⁾	Basic
Corporate Finance – Capital Budgeting (<i>new course</i>)	1.25 ⁽³⁾	Intermediate
Corporate Finance – Cost of Capital (<i>new course</i>)	1.25 ⁽³⁾	Intermediate
Corporate Finance – Measuring Business Performance – Economic Profit (<i>new course</i>)	1.25 ⁽³⁾	Intermediate
Corporate Finance – Measuring Business Performance – Free Cash Flow (<i>new course</i>)	1.25 ⁽³⁾	Intermediate
Dividend Policy	1 ⁽³⁾	Intermediate
Mergers & Acquisitions	1 ⁽³⁾	Basic
Corporate Valuation		
Corporate Valuation – An Overview	1 ⁽³⁾	Basic

Course Name	CPE Credits	Course Level
Finance Courses		
Corporate Valuation – Acquisition Comparables Analysis <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Corporate Valuation – Discounted Cash Flow (DCF) Analysis <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Corporate Valuation – Leverage Buyout (LBO) Analysis <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Corporate Valuation – Merger Consequences Analysis <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Corporate Valuation – Public Comparables Analysis <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Credit Derivatives		
Credit Derivatives – An Introduction	1.5 ⁽³⁾	Intermediate
Credit Derivatives – Basket Swap Structures	1.25 ⁽³⁾	Intermediate
Credit Derivatives – Capital Structure Arbitrage	1 ⁽³⁾	Intermediate
Credit Derivatives – CDS Indexes <i>(new course)</i>	1.25 ⁽³⁾	Advanced
Credit Derivatives – Credit Default Swap Valuation	3 ⁽³⁾	Advanced
Credit Derivatives – Credit Default Swaps	1 ⁽³⁾	Intermediate
Credit Derivatives – Credit-Linked Notes	1.25 ⁽³⁾	Intermediate
Credit Derivatives – Credit Spread Options	1.25 ⁽³⁾	Intermediate
Credit Derivatives – Pricing Methods	1 ⁽³⁾	Advanced
Credit Derivatives – Regulation & Documentation	1 ⁽³⁾	Intermediate
Credit Derivatives – Synthetic Collateralized Debt Obligations (CDOs)	1.5 ⁽³⁾	Advanced
Credit Derivatives – Total Rate of Return Swaps	1 ⁽³⁾	Intermediate
Credit Derivatives – Types <i>(new course)</i>	1 ⁽³⁾	Intermediate
Credit Derivatives – Uses & Applications	1 ⁽³⁾	Intermediate
Credit Risk Modeling		
Credit Risk Modeling - An Introduction <i>(new course)</i>	1 ⁽³⁾	Intermediate
Credit Risk Modeling - CreditMetrics™ <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Credit Risk Modeling - CreditRisk+ <i>(new course)</i>	1 ⁽³⁾	Intermediate
Credit Risk – Modeling – KMV & Comparison of Models	1 ⁽³⁾	Intermediate
Economic and Technical Analysis		
Economic Indicators – An Introduction <i>(new course)</i>	1.25 ⁽³⁾	Basic

Course Name	CPE Credits	Course Level
Finance Courses		
Economic Indicators – Business Cycles (<i>new course</i>)	1.5 ⁽³⁾	Basic
Economic Indicators – Inflation and Employment (<i>new course</i>)	1.25 ⁽³⁾	Basic
Economic Indicators – National Accounts (<i>new course</i>)	1.25 ⁽³⁾	Basic
Technical Analysis – An Overview	2 ⁽³⁾	Basic
Technical Analysis – Charting (<i>new course</i>)	1 ⁽³⁾	Basic
Technical Analysis – Tools and Techniques (<i>new course</i>)	1 ⁽³⁾	Basic
Equities		
Canadian Equity Market	1 ⁽³⁾	Basic
Equities – Research and Valuation (<i>new course</i>)	1.25 ⁽³⁾	Intermediate
Equities – Trading (<i>new course</i>)	1.25 ⁽³⁾	Intermediate
Equity Portfolio Management – Indexes and Hedging (<i>new course</i>)	1 ⁽³⁾	Intermediate
Equity Portfolio Management – Risk and Return (<i>new course</i>)	1.25 ⁽³⁾	Basic
Equity Program Trading	1 ⁽³⁾	Basic
European Equity Markets (<i>recently updated</i>)	1.5 ⁽³⁾	Basic
Hong Kong Equity Market	1 ⁽³⁾	Basic
Japanese Equity Market	1 ⁽³⁾	Basic
Singapore Equity Market	1 ⁽³⁾	Basic
U.K. Equity Market (<i>recently updated</i>)	1 ⁽³⁾	Basic
U.S. Equity Market	1 ⁽³⁾	Basic
Equity Derivatives		
Convertibles – An Introduction (<i>new course</i>)	1.25 ⁽³⁾	Basic
Convertibles – Introduction to Convertible Valuation (<i>new course</i>)	1.25 ⁽³⁾	Intermediate
Equity Derivatives – An Introduction	1 ⁽³⁾	Intermediate
Equity Derivatives – Equity Index Swaps	1.5 ⁽³⁾	Intermediate
Equity Derivatives – Types	1.25 ⁽³⁾	Intermediate
Equity Derivatives – Warrants – An Introduction	2 ⁽³⁾	Intermediate
Equity Derivatives – Warrants – Pricing (<i>recently updated</i>)	1 ⁽³⁾	Intermediate
Exotic Options		
Options – Average Rate Options	1 ⁽³⁾	Advanced

Course Name	CPE Credits	Course Level
Finance Courses		
Options – Barrier Options	2.5 ⁽³⁾	Advanced
Options – Basket & Spread Options – An Introduction	1 ⁽³⁾	Basic
Options – Basket & Spread Options – Evaluation and Evolution (<i>new course</i>)	1.5 ⁽³⁾	Advanced
Options – Exotic Options (<i>new course</i>)	1.5 ⁽³⁾	Advanced
Fixed Income		
Bond Prices and Yields	1 ⁽³⁾	Basic
Bond Strategies – Fundamentals	1 ⁽³⁾	Intermediate
Canadian Bond Market	1 ⁽³⁾	Basic
Duration & Convexity	1 ⁽³⁾	Intermediate
Eurobonds – An Introduction (<i>new course</i>)	1.5 ⁽³⁾	Basic
Eurobonds – Issuing and Investing (<i>new course</i>)	1.25 ⁽³⁾	Intermediate
European Bond Markets (<i>new course</i>)	2 ⁽³⁾	Basic
Fixed Income – Credit Risk (<i>recently updated</i>)	1 ⁽³⁾	Basic
Floating Rate Notes (FRNs)	1 ⁽³⁾	Intermediate
Japanese Bond Market	1 ⁽³⁾	Basic
U.K. Bond Market	1 ⁽³⁾	Basic
U.S. Bond Market	1 ⁽³⁾	Basic
Fixed Income Analysis		
Basis Trading	1 ⁽³⁾	Intermediate
Bond Futures	1 ⁽³⁾	Advanced
Bond Futures Basis	1 ⁽³⁾	Advanced
Bond Hedging with Options (<i>new course</i>)	1 ⁽³⁾	Intermediate
Bond Hedging with Swaps (<i>new course</i>)	1 ⁽³⁾	Advanced
High-Yield Debt (<i>new course</i>)	1 ⁽³⁾	Basic
Relative Value Trading – An Introduction (<i>new course</i>)	1 ⁽³⁾	Intermediate
Relative Value Trading – Strategies and Risks (<i>new course</i>)	1.25 ⁽³⁾	Advanced
Zero-Coupon Bonds	1 ⁽³⁾	Intermediate
Foreign Exchange		
Foreign Exchange – Introduction to the Forwards Market	1 ⁽³⁾	Basic
Foreign Exchange – Introduction to the Spot Market	1 ⁽³⁾	Basic
Foreign Exchange – Market Evolution	2 ⁽³⁾	Basic

Course Name	CPE Credits	Course Level
Finance Courses		
Foreign Exchange (FX) Option Trading	1.5 ⁽³⁾	Advanced
Foreign Exchange Dealing – Factors Influencing the FX Market <i>(new course)</i>	1 ⁽³⁾	Basic
Foreign Exchange Dealing – Forwards Market – An Introduction	2 ⁽³⁾	Intermediate
Foreign Exchange Dealing – Forwards Market – Arbitrage and Foreign Exchange Swaps	1 ⁽³⁾	Intermediate
Foreign Exchange Dealing – Forwards Market – Calculations	2 ⁽³⁾	Intermediate
Foreign Exchange Dealing – Forwards Market – Hedging & Cash Management	1 ⁽³⁾	Intermediate
Foreign Exchange Dealing – Spot Market	1.5 ⁽³⁾	Basic
Foreign Exchange Dealing – The Typical Day <i>(new course)</i>	1 ⁽³⁾	Basic
Forwards and Futures		
Forwards and Futures – Pricing <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Forwards and Futures – Hedging (Part I) <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Forwards and Futures – Hedging (Part II) <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Forwards and Futures – Trading <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Futures Markets <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Inflation-Linked Instruments		
Inflation-Linked Instruments – An Introduction	1 ⁽³⁾	Intermediate
Inflation-Linked Instruments – Pricing	1 ⁽³⁾	Intermediate
Interest Rate & Currency Swap Fundamentals		
Swaps – Applications <i>(new course)</i>	1 ⁽³⁾	Intermediate
Swaps – Applications for Corporates <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Swaps – Applications for Institutional Investors <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Swaps – Book Management <i>(new course)</i>	1.5 ⁽³⁾	Advanced
Swaps – Credit Exposure <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Swaps – Documentation and Settlement <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Swaps – Pricing and Valuation (Part I) <i>(new course)</i>	1 ⁽³⁾	Intermediate
Swaps – Pricing and Valuation (Part II) <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Interest Rate & Currency Swap Structures		
Swaps – Asset Swaps – An Introduction	1 ⁽³⁾	Basic

Course Name	CPE Credits	Course Level
Finance Courses		
Swaps – Asset Swaps – Pricing	1 ⁽³⁾	Intermediate
Swaps – Constant Maturity Swaps	2 ⁽³⁾	Advanced
Swaps – Currency Swaps	1 ⁽³⁾	Intermediate
Swaps – Differential Swaps	1 ⁽³⁾	Intermediate
Swaps – Forward, Amortizing and Zero-Coupon Swaps	3 ⁽³⁾	Advanced
Swaps – In-arrears Swaps	3 ⁽³⁾	Advanced
Swaps – Overnight Indexed Swaps	1 ⁽³⁾	Intermediate
Interest Rate Options		
Bermudian Swaptions	1 ⁽³⁾	Advanced
Callable Bonds	1 ⁽³⁾	Intermediate
Caps & Floors – An Introduction	1 ⁽³⁾	Basic
Caps & Floors – Chooser & Double-Strike Structures	1.5 ⁽³⁾	Advanced
Caps & Floors – Pricing	1.25 ⁽³⁾	Advanced
Interest Rate Volatility	1 ⁽³⁾	Advanced
Options – Managing an Interest Rate Option Book	1.5 ⁽³⁾	Advanced
Swaptions	1.25 ⁽³⁾	Advanced
International Currency Management		
International Currency Management (<i>new course</i>)	1.5 ⁽⁴⁾	Basic
Managing International Currency Risk (<i>new course</i>)	1.5 ⁽⁴⁾	Basic
Introduction to Budgeting		
Capital Budgeting (<i>new course</i>)	.5 ⁽⁴⁾	Basic
Capital Budgeting	6	Basic
Context and Purpose of Budgeting (<i>new course</i>)	1 ⁽⁴⁾	Basic
Implementing Budgets (<i>new course</i>)	.5 ⁽⁴⁾	Basic
Master Budgets (<i>new course</i>)	1 ⁽⁴⁾	Basic
Revenue Budgeting (<i>new course</i>)	.5 ⁽⁴⁾	Basic
The Budgeting Process (<i>new course</i>)	1.5 ⁽⁴⁾	Basic
Introduction to Derivatives		
Derivatives – An Overview (<i>new course</i>)	1.5 ⁽³⁾	Basic
Forwards and Futures – An Introduction (<i>new course</i>)	1.25 ⁽³⁾	Intermediate
Options – An Introduction (<i>new course</i>)	1 ⁽³⁾	Basic
Swaps – An Introduction	1 ⁽³⁾	Intermediate

Course Name	CPE Credits	Course Level
Finance Courses		
Introduction to Financial Markets		
Bonds – An Introduction (<i>new course</i>)	1 ⁽³⁾	Basic
Bonds – Primary & Secondary Market (<i>new course</i>)	1.25 ⁽³⁾	Basic
Equities – An Introduction (<i>new course</i>)	1 ⁽³⁾	Basic
Equities – Issuing (<i>new course</i>)	1 ⁽³⁾	Basic
Financial Markets – An Introduction	2 ⁽³⁾	Basic
Foreign Exchange – Market Overview (<i>new course</i>)	1 ⁽³⁾	Basic
Money Markets – An Introduction (<i>new course</i>)	1 ⁽³⁾	Basic
Introduction to Investment		
Investment – An Introduction	1 ⁽³⁾	Basic
Portfolio Management – Passive & Active Strategies	1 ⁽³⁾	Intermediate
Introduction to Macroeconomics		
Macroeconomics – Balance of Payments	2 ⁽³⁾	Basic
Macroeconomics – Fiscal Policy	2.5 ⁽³⁾	Intermediate
Macroeconomics – Gross Domestic Product (GDP)	2 ⁽³⁾	Intermediate
Macroeconomics – Inflation	2.5 ⁽³⁾	Basic
Macroeconomics – Monetary Policy	1.5 ⁽³⁾	Basic
Macroeconomics – Unemployment	1 ⁽³⁾	Intermediate
Islamic Banking and Finance		
Islamic Banking and Finance – Deposit and Financing Instruments (<i>new course</i>)	1 ⁽³⁾	Basic
Islamic Banking and Finance – Key Principles (<i>new course</i>)	1 ⁽³⁾	Basic
Money Markets		
Money Market Futures	1 ⁽³⁾	Intermediate
Money Market Calculations – Short-term Instruments	1 ⁽³⁾	Intermediate
Money Market Calculations – Term Instruments	1 ⁽³⁾	Basic
Money Markets – Bills of Exchange (<i>new course</i>)	1 ⁽³⁾	Basic
Money Markets – Call and Fixed Deposits (<i>new course</i>)	1 ⁽³⁾	Intermediate
Money Markets – Certificates of Deposits (CDs) (<i>new course</i>)	1 ⁽³⁾	Basic
Money Markets – Commercial Paper (CP) (<i>new course</i>)	1 ⁽³⁾	Basic
Money Markets – Interest Rates (<i>new course</i>)	1 ⁽³⁾	Basic
Money Markets – Repurchase (Repo) Agreements	1.5 ⁽³⁾	Intermediate

Course Name	CPE Credits	Course Level
Finance Courses		
Money Markets – Treasury Bills <i>(new course)</i>	1 ⁽³⁾	Basic
Mutual Funds		
Investment Companies (U.S.) – Fundamentals	1 ⁽³⁾	Basic
Mutual Funds (US) – An Introduction <i>(new course)</i>	1 ⁽³⁾	Basic
Mutual Funds (US) – Investing <i>(new course)</i>	1 ⁽³⁾	Intermediate
Options		
Options – Beyond Black-Scholes <i>(new course)</i>	1.5 ⁽³⁾	Advanced
Options – Future Asset Prices and Volatility <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Options – Greeks (Part I) <i>(new course)</i>	1.25 ⁽³⁾	Advanced
Options – Greeks (Part II) <i>(new course)</i>	1.25 ⁽³⁾	Advanced
Options – Introduction to Option Valuation <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Options – Managing an Option Portfolio	1.5 ⁽³⁾	Advanced
Options – Replication, Risk Neutrality, and Black-Scholes <i>(new course)</i>	1.25 ⁽³⁾	Advanced
Options – Trading Strategies <i>(new course)</i>	1.5 ⁽³⁾	Intermediate
Portfolio Theory		
Market Efficiency – The Concept	1.5 ⁽³⁾	Intermediate
Market Efficiency – The Evidence	2 ⁽³⁾	Intermediate
Portfolio Theory – Arbitrage Pricing Theory (APT)	1 ⁽³⁾	Intermediate
Portfolio Theory – Performance Measurement Models	2 ⁽³⁾	Intermediate
Portfolio Theory – Single-Index & Multi-Index Models	1 ⁽³⁾	Intermediate
Portfolio Theory – The Capital Asset Pricing Model (CAPM)	1.5 ⁽³⁾	Intermediate
Portfolio Theory – The Markowitz Model	1 ⁽³⁾	Intermediate
Prime Brokerage		
Prime Brokerage – An Introduction <i>(new course)</i>	1 ⁽³⁾	Basic
Prime Brokerage – The Institution's Viewpoint <i>(new course)</i>	1 ⁽³⁾	Basic
Prime Brokerage – The Prime Broker's Viewpoint <i>(new course)</i>	1 ⁽³⁾	Basic
Principles of Credit Risk Analysis		
Cash Flow Forecasting <i>(new course)</i>	1 ⁽³⁾	Intermediate
Credit Analysis – An Introduction	1.25 ⁽³⁾	Intermediate
Debt Capacity and Cash Flow Analysis <i>(new course)</i>	1 ⁽³⁾	Intermediate
Financial Analysis – An Introduction <i>(new course)</i>	1.5 ⁽³⁾	Basic

Course Name	CPE Credits	Course Level
Finance Courses		
Principles of Credit Extension <i>(new course)</i>	1 ⁽³⁾	Basic
Private Banking and Wealth Management		
Private Banking and Wealth Management – An Introduction <i>(new course)</i>	1.5 ⁽³⁾	Basic
Private Banking and Wealth Management – Overview of Investing <i>(new course)</i>	1 ⁽³⁾	Basic
Private Banking and Wealth Management – Real Estate Investing <i>(new course)</i>	1.5 ⁽³⁾	Basic
Private Banking and Wealth Management – Structured Products <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Private Banking and Wealth Management – Techniques of Investing <i>(new course)</i>	1.25 ⁽³⁾	Basic
Private Equity (Part I) <i>(new course)</i>	1.25 ⁽³⁾	Basic
Private Equity (Part II) <i>(new course)</i>	1 ⁽³⁾	Basic
Regulatory Environment		
Basel II – An Overview <i>(new course)</i>	1.25 ⁽³⁾	Basic
Central Authorities	1.5 ⁽³⁾	Basic
Markets in Financial Instruments Directive (MiFID) <i>(new course)</i>	1 ⁽³⁾	Basic
Risk Management		
Credit Risk – An Introduction	1 ⁽³⁾	Intermediate
Market Risk – An Introduction <i>(new course)</i>	1.5 ⁽³⁾	Basic
Operational Risk – An Introduction	1.25 ⁽³⁾	Basic
Risk Management – An Overview	1 ⁽³⁾	Basic
Risk Management – Liquidity Analysis & Control	1 ⁽³⁾	Intermediate
Securitization		
Securitization – An Introduction	1.5 ⁽³⁾	Basic
Securitization – Asset-Backed Securities	1 ⁽³⁾	Intermediate
Securitization – Collateralized Debt Obligations (CDOs) - An Introduction	1 ⁽³⁾	Basic
Securitization – Collateralized Debt Obligations (CDOs) - Structures & Ratings	1.25 ⁽³⁾	Intermediate
Securitization – Commercial Mortgaged-Backed Securities <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Securitization – Credit Card ABS <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Securitization – European Mortgaged-Backed Securities <i>(new course)</i>	1.25 ⁽³⁾	Intermediate
Securitization – Mortgaged-Backed Securities (MBS) <i>(new course)</i>	1.5 ⁽³⁾	Intermediate

Course Name	CPE Credits	Course Level
Finance Courses		
Structured Derivative Notes and Swaps		
Capped & Collared Floating Rate Notes (FRNs)	1 ⁽³⁾	Intermediate
CMS Option Structures <i>(new course)</i>	1.5 ⁽³⁾	Advanced
Inverse FRNs <i>(new course)</i>	1.25 ⁽³⁾	Advanced
Power Reverse Dual Currency (PRDC) Notes <i>(new course)</i>	1.25 ⁽³⁾	Advanced
Range Accrual Structures	1.5 ⁽³⁾	Advanced
Target Redemption Notes (TARNs) <i>(new course)</i>	1.25 ⁽³⁾	Advanced
Trigger Structures	1.5 ⁽³⁾	Advanced
Trade Finance and Letters of Credit		
Letters of Credit - Structures & Forms of Payment	1 ⁽³⁾	Basic
Letters of Credit - Types	1.25 ⁽³⁾	Intermediate
Trade Finance & Letters of Credit – An Introduction	1 ⁽³⁾	Intermediate
Trade Processing		
Trade Processing – An Introduction <i>(new course)</i>	1.25 ⁽³⁾	Basic
Trade Processing – Equities <i>(new course)</i>	1.25 ⁽³⁾	Basic
Trade Processing – Fixed Income <i>(new course)</i>	1.25 ⁽³⁾	Basic
Trade Processing – Foreign Exchange <i>(new course)</i>	1.25 ⁽³⁾	Basic
Trade Processing – Futures <i>(new course)</i>	1.25 ⁽³⁾	Basic
Trade Processing – Options <i>(new course)</i>	1.25 ⁽³⁾	Basic
Trade Processing – OTC Derivatives <i>(new course)</i>	1.25 ⁽³⁾	Basic
Trade Processing – Risks and Risk Management <i>(new course)</i>	1.25 ⁽³⁾	Basic
Value Creation		
Driving Value <i>(new course)</i>	1.5 ⁽⁴⁾	Basic
The Value Creation Concept <i>(new course)</i>	1.5 ⁽⁴⁾	Basic
The Value Model <i>(new course)</i>	1.5 ⁽⁴⁾	Basic
VAR		
VAR – An Introduction <i>(new course)</i>	1 ⁽³⁾	Basic
VAR – Historical Simulation and Other Issues <i>(new course)</i>	1 ⁽³⁾	Basic
VAR – Monte Carlo Simulation <i>(new course)</i>	1.5 ⁽³⁾	Basic
VAR – Variance-Covariance Approach <i>(new course)</i>	2 ⁽³⁾	Basic
Working Capital Management		
Cash Flow Challenge <i>(new course)</i>	1 ⁽⁴⁾	Basic
Cash, Receivables and Payables <i>(new course)</i>	1.5 ⁽⁴⁾	Basic
Introduction to Working Capital <i>(new course)</i>	1 ⁽⁴⁾	Basic

Course Name	CPE Credits	Course Level
Finance Courses		
Inventory Management (<i>new course</i>)	1 ⁽⁴⁾	Basic
Yield Curves		
Building a Yield Curve	2 ⁽³⁾	Intermediate
Futures – Building a Yield Curve (Actual Dates)	1 ⁽³⁾	Intermediate
Futures – Building a Yield Curve (Even Periods)	1 ⁽³⁾	Intermediate

Course Name	CPE Credits	Course Level
Financial Planning Education		
Foundation		
Basic Final Assessment Test	None	Basic
Comprehensive Case Study	2	Basic
Education Planning	3	Basic
Estate Planning	4	Basic
Income Taxes	4	Basic
Introduction to Financial Planning	3	Basic
Investment Planning	4	Basic
Retirement Planning	5	Basic
Risk Management	3	Basic
Stock Options and Compensation Planning	4	Basic
Continuing Education		
Advanced Education Planning – The Use of 529 Plans	1	Advanced
Advanced Estate Planning I	5	Advanced
Advanced Estate Planning II	5	Advanced
Advanced Equity Investment Planning	3	Advanced
Advanced Income Tax Planning	3	Advanced
Advanced Income Tax Planning – Taxation of Financial Instruments I	1.5	Advanced
Advanced Income Tax Planning – Taxation of Financial Instruments II	1	Advanced
Advanced Insurance Planning I	3	Advanced
Advanced Insurance Planning II	3	Advanced
Advanced Retirement Planning – Minimum Distributions	1.5	Advanced
Advanced Stock Option Planning – Incentive Stock Options	1.5	Advanced
Gifting Techniques	3	Advanced
Recap of 2003 and 2004 Tax Legislation	1.5	Advanced
Year-End Financial Planning for Individuals	1	Advanced

Course Name	CPE Credits	Course Level
Tax Courses		
Accounting Methods & Periods		
Accounting Methods & Periods Series: Accounting Periods	3	Basic
Accounting Methods & Periods Series: Changes in Accounting Methods	2	Intermediate
Accounting Methods & Periods Series: Inventory Valuation	7	Basic
Accounting Methods & Periods Series: LIFO Inventory	5	Intermediate
Accounting Methods & Periods Series: Overview of Accounting Methods	5	Basic
Accounting Methods & Periods Series: Timing of Expense Deduction	5	Basic
Accounting Methods & Periods Series: Timing of Income Recognition	7	Basic
Capital Gains and Losses		
Capital Gains and Losses	9	Advanced
Consolidated Tax Returns		
Consolidated Tax Returns	8	Intermediate
Consolidated Tax Returns: Intercompany Transactions	9	Advanced
Consolidated Tax Returns – Intermediate: Acquisitions and Dispositions of a Subsidiary	7	Intermediate
Consolidated Tax Returns – Intermediate: Consolidated Net Operating Losses and Separate Return Limitation Years	4	Intermediate
Consolidated Tax Returns – Intermediate: Net Operating Losses - Section 382	4	Intermediate
Consolidated Tax Returns – Intermediate: Other Consolidated Topics	4	Intermediate
Corporate Taxes		
Alternative Minimum Tax: Corporate	2	Advanced
Understanding Schedules M-1 and M-2 on Forms 1120 and 1120S	5	Intermediate
Depreciation		
Depreciation: Modified ACRS	9	Intermediate
Expatriate Taxation		
Introduction to Expatriate Taxation Series: Expatriate Exclusions	6	Basic
Introduction to Expatriate Taxation Series: Foreign Nationals	5	Basic

Course Name	CPE Credits	Course Level
Tax Courses		
Introduction to Expatriate Taxation Series: Other Expatriate and Foreign Nationals Topics	5	Basic
Foreign Tax Credits		
Foreign Tax Credits & Subpart F Series: Deemed Paid Foreign Credit	5	Intermediate
Foreign Tax Credits & Subpart F Series: Effects of Baskets	5	Intermediate
Foreign Tax Credits & Subpart F Series: Foreign Tax Credit Basics	3	Basic
Foreign Tax Credits & Subpart F Series: Interest Expense Allocation	5	Intermediate
Foreign Tax Credits & Subpart F Series: Look Through	9	Basic
Foreign Tax Credits & Subpart F Series: Overall Foreign Loss (OFLs)	5	Intermediate
Foreign Tax Credits & Subpart F Series: Rules for Sourcing Income	4	Intermediate
Foreign Tax Credits & Subpart F Series: Subpart F Part I	10	Intermediate
Foreign Tax Credits & Subpart F: Subpart F Part II	5	Intermediate
International Reorganizations		
International Reorganizations Series: Dual Consolidated Losses	2	Intermediate
International Reorganizations Series: Section 304 – Redemptions Using Related Corporations	4	Intermediate
International Reorganizations Series: Section 338 – Stock Purchases as Asset Acquisitions	3	Intermediate
International Reorganizations Series: Section 367	13	Intermediate
International Taxation		
Basic International Taxation Series: Foreign Corporations and Anti-Deferral Provisions	8	Basic
Basic International Taxation Series: Foreign Tax Credit	7	Basic
Basic International Taxation Series: Fundamental Concepts	6	Basic
Basic International Taxation Series: Planning for Foreign Operations	5	Basic
International Taxation: Inbound Transactions I	3	Basic
International Taxation: Inbound Transactions II	2	Basic
International Taxation: Outbound Transactions	7	Basic

Course Name	CPE Credits	Course Level
Tax Courses		
Miscellaneous Tax		
Bankruptcy and the New Act of 2005	7	Intermediate
Casualty and Disaster Losses	2	Basic
Commercial Bank Taxation and Regulatory Issues: Introduction	8	Basic
Employee Benefit Plans: Introduction	4	Basic
Employee Benefits: Introduction to Executive Compensation	2	Advanced
Entity Comparisons <i>(recently updated)</i>	2	Basic
Ethics and Professional Responsibilities in Tax Practice <i>(recently updated)</i>	1	Basic
Incidental Fringe Benefits	5	Intermediate
Interest Deduction Rule	8	Intermediate
Investment Income Tax and Bond Investments	5	Intermediate
Investment Income Tax and Non Bond Investments <i>(new course)</i>	4	Intermediate
Judicial Concepts of Taxation	1	Basic
LIFO Inventory Method	9	Intermediate
Oil and Gas Taxation	7	Intermediate
Overview of Business Entities	3	Basic
Passive Losses	8	Intermediate
Purchasing and Selling a Business	8	Intermediate
Partnerships		
LLCs & LLPs: Rules for Limited Liability Entities <i>(recently updated)</i>	9	Advanced
Partnership Series: Basis in Partnership Interest	4	Basic
Partnership Series: Closing the Partnership's Tax Year	4	Basic
Partnership Series: Dispositions of Partnership Interests ⁽¹⁾	4	Basic
Partnership Series: Distributions to Partners	6	Basic
Partnership Series: Family Partnerships ⁽¹⁾	4	Intermediate
Partnership Series: Partnership Allocations	6	Basic
Partnership Series: Partnership Basis Adjustment ⁽¹⁾	4	Basic
Partnership Series: Partnership Classification	4	Basic

Course Name	CPE Credits	Course Level
Tax Courses		
Partnership Series: Partnership Formations	5	Basic
Partnership Series: Partnership Operations	5	Basic
Partnership Series: Retirement or Death of a Partner	3	Intermediate
Partnership Series: Special Allocation for Contributed Property	4	Intermediate
Partnership Series: Transactions Between Partners & Partnerships	4	Basic
Partnership Taxation: Advanced	9	Advanced
Partnership Taxation: Fundamentals	8	Intermediate
Personal Income Taxes		
Alternative Minimum Tax	6	Intermediate
Income Tax Training, Form 1040: Module 1. Getting Started	9	Basic
Income Tax Training, Form 1040: Module 2. Tax Savings Opportunities <i>(recently updated)</i>	14	Basic
Income Tax Training, Form 1040: Module 3. Business and Property Income <i>(recently updated)</i>	13	Basic
Income Tax Training, Form 1040: Module 4. Advanced Tax Issues	14	Basic
IRAs: Contributions	5	Intermediate
IRAs: Distributions	7	Advanced
IRAs: Transfers and Conversions	5	Intermediate
Retirement Income Taxation	6	Intermediate
S Corporations		
Taxation of S Corporation Series: Effect of the Election on the Corporation	3	Basic
Taxation of S Corporation Series: Effect of the Election on the Shareholders	9	Basic
Taxation of S Corporation Series: Taxes Imposed on S Corporations	5	Basic
Taxation of S Corporation Series: Termination of Election	2	Basic
State and Local Taxes		
Basic SALT Series: Corporate Income and Franchise Tax	8	Basic
Basic SALT Series: Payroll and Unemployment Taxes	2	Basic
Basic SALT Series: Property Tax	3	Basic

Course Name	CPE Credits	Course Level
Tax Courses		
Basic SALT Series: Sales and Use Tax	9	Basic
Multistate Taxation	5	Basic
State and Local Taxes	8	Basic
Subchapter C Corporations		
C Corporations – Income Tax Reporting	5	Basic
C Corporations – Overview of Corporate Income Tax <i>(new course)</i>	4	Basic
C Corporations – Tax Depreciation and Amortization	3	Basic
Small Business Schedule C & F Expenses <i>(recently updated)</i>	10	Basic
Subchapter C: Fundamentals of Corporate Taxation	7	Intermediate
Subchapter C Series: Corporate Distributions	4	Basic
Subchapter C Series: Corporate Divisions	5	Intermediate
Subchapter C Series: Corporate Formations	3	Basic
Subchapter C Series: Corporate Liquidations	3	Basic
Subchapter C Series: Corporate Penalty Taxes	5	Basic
Subchapter C Series: Corporate Redemptions	8	Basic
Subchapter C Series: Judicial Doctrines	3	Intermediate
Subchapter C Series: Nontaxable Corporate Reorganizations	6	Intermediate
Subchapter C Series: Overview of Taxable and Nontaxable Acquisitions	6	Intermediate
Subchapter C Series: Purchase Price Allocations	2	Intermediate
Subchapter C Series: Statutory Limitations on Tax Attributes	8	Intermediate
Subchapter C Series: Tax Consequences of Nontaxable Reorganizations	5	Intermediate
Subchapter C Series: Taxable Acquisitions	5	Intermediate
Tax Procedures and Research		
Tax Practice and Procedure: Fundamentals	8	Basic
Tax Research I: Tax Law and Treasury Interpretations	4	Basic
Tax Research II: Court Interpretations and Citator	9	Basic
Tax Research III: Case Analysis	4	Basic

Course Name	CPE Credits	Course Level
Tax Courses		
Tax Updates		
American Jobs Creation Act (AJCA)	5	Basic
Corporate Tax Update <i>(recently updated)</i>	5	Update
Economic Stimulus Act of 2008 <i>(new course)</i>	5	Basic
Energy Tax Incentive Act of 2005	3	Basic
Individual Tax Overview <i>(recently updated)</i>	8	Basic
The Emergency Economic Stabilization Act of 2008 <i>(new course)</i>	6	Basic
Working Families Tax Relief Act (WFRA)	3	Basic
Transfer Pricing		
Basic Transfer Pricing: Comparability Analysis	3	Intermediate
Basic Transfer Pricing: General Principles	8	Intermediate
Basic Transfer Pricing: Transfer Pricing Methods	7	Intermediate

Course Name	CPE Credits	Course Level
Industry Courses		
General Courses		
Introduction to Investment Companies	6	Basic
Introduction to Securities Brokers/Dealers (<i>recently updated</i>)	4	Basic
Introduction to the Automotive Supply Chain	4	Basic
Introduction to the Consumer Products Industry	5	Basic
Introduction to the Food and Beverage Industry	4	Basic
Introduction to the Health Care Industry	8	Basic
Introduction to the Media Industry	6	Basic
Introduction to the Pharmaceutical Industry	8	Basic

Course Name	CPE Credits	Course Level
Miscellaneous Courses		
General Courses		
Business Perspectives (<i>new course</i>)	1.5 ⁽⁴⁾	Basic
Effective Writing for Accountants	8	Intermediate
How to Start a Business (<i>recently updated</i>)	8	Intermediate
How to Write a Business Plan (<i>recently updated</i>)	8	Intermediate
Human Resource Management: An Introduction to the Workforce	4	Basic
Human Resource Management: Separation from Company	4	Basic
Identity Theft and the Individual	2	Basic
Identity Theft in the Business Environment	2	Basic
Planning for the Future – Budgeting (<i>new course</i>)	3 ⁽⁴⁾	Basic
Powerful Presentations: How to Build and Deliver	4	Basic
Sources of Financial Information (<i>new course</i>)	1 ⁽⁴⁾	Basic
Understanding the Business (<i>new course</i>)	1.5 ⁽⁴⁾	Basic

- (1) This course is currently undergoing a technical update; it is not available for new registrants, however existing registrants can access the course.
- (2) This course is currently undergoing qualification to meet NASBA/QAS CPE requirements; however the course is available and will consume enrolments based on the course credit assigned.
- (3) One of our content providers, Intuition, has recently decided to not maintain their courses to comply with the continuing professional education (CPE) requirements of the National Association of State Boards of Accountancy (NASBA). As a result, effective immediately, this course will no longer qualify for CPE credit; however the course is available and will consume enrolments based on the course credit assigned. We will be evaluating potential replacements for some of these courses to qualify for CPE credit.
- (4) This course does not qualify for CPE credit under the guidelines of NASBA.

Details on each course are available in the CFO University Course Catalog. This Catalog is 500 pages in length. If you would like an electronic copy of this Catalog or you have any questions regarding CFO University, please contact your ACS Account Manager or Bob Daugherty.

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Additional off-the-shelf learning content is available from ACS. Off-the-shelf curriculums available include business communications, customer relations, human relations, leadership, management, personal computer, personal effectiveness, quality, sales, team building, and others. ACS has experience developing integrated learning solutions to address a wide range of business issues. If you have a business issue that needs addressing, contact ACS to see whether learning could be part of the solution. For information on ACS's integrated learning solutions visit www.acs-inc.com/learning. Alternatively, contact Bob Daugherty or your ACS Account Manager.