New England Society of CPAs

Your Selections: Keyword: **EA/IRS credit**

The Complete Guide to Payroll Taxes and 1099 Issues

Thursday, August 20 2026 9:00am - 4:30pm EDT | Virtual | 8.00 Credits | $ Member Price: $309

You could pay $0 for this course!This course qualifies for EA/IRS and CFP credit. If you need EA/IRS credit, please contact Tyler Dion (tdion@necpas.org) after you have registered and provide him your PTIN number. This year practitioners need to keep abreast of tax changes affecting pass-through entities used by their business clients and employers, and this enlightening course delivers that information. You will learn invaluable strategies, techniques, innovative tax-planning concepts, income-generating ideas, and other planning opportunities available to S corporations, partnerships, LLCs, and LLPs. In addition, this course will discuss current trends and emerging issues, helping practitioners stay informed about relevant and significant topics that may impact their clients. Continually updated to reflect enacted legislation. Massachusetts firms/companies with fewer than 50 staff can be reimbursed up to 100% of the cost of training and firms/companies with 50-100 employees can be reimbursed up to 50% of the cost of training. You must register for the course and apply for reimbursement through the Massachusetts Workforce Training Express Fund website a minimum of three weeks prior to the start of the course to be eligible. The course code for this program is C-15385. To learn more, click here or contact Julia Ekelund at jekelund@necpas.org.

Required Minimum Distributions: Compliance and Planning

Tuesday, August 25 2026 9:00am - 12:30pm EDT | Virtual | 4.00 Credits | $ Member Price: $219

You could pay $0 for this course!This course qualifies for EA/IRS and CFP credit. If you need EA/IRS credit, please contact Tyler Dion (tdion@necpas.org) after you have registered and provide him your PTIN number. Required minimum distributions (RMDs) from employer retirement plans and IRAs must be made or steep penalties will be incurred. Planning opportunities exist in certain situations to minimize distributions. Also, special rules exist for inherited retirement funds. Your clients depend on you to help them navigate the rules regarding required minimum distributions and the taxation of distributions. This course addresses compliance issues and planning opportunities regarding required minimum distributions. Massachusetts firms/companies with fewer than 50 staff can be reimbursed up to 100% of the cost of training and firms/companies with 50-100 employees can be reimbursed up to 50% of the cost of training. You must register for the course and apply for reimbursement through the Massachusetts Workforce Training Express Fund website a minimum of three weeks prior to the start of the course to be eligible. The course code for this program is C-3097. To learn more, click here or contact Julia Ekelund at jekelund@necpas.org.

Introduction to Compilation Engagements

Friday, September 25 2026 9:00am - 10:40am EDT | Virtual | 2.00 Credits | $ Member Price: $109

You could pay $0 for this course!This course qualifies for EA/IRS and CFP credit. If you need EA/IRS credit, please contact Tyler Dion (tdion@necpas.org) after you have registered and provide him your PTIN number. This program discusses, in a practical way, how an S corporation shareholder calculates their stock and loan basis on Form 7203. Form 7203 is the IRS Form on which a shareholder is sometimes required to calculate their stock and loan basis. This topic is particularly important when an S corporation has a loss and the shareholders wish to know whether they are entitled to fully utilize the loss that has been allocated to them against their other income. Massachusetts firms/companies with fewer than 50 staff can be reimbursed up to 100% of the cost of training and firms/companies with 50-100 employees can be reimbursed up to 50% of the cost of training. You must register for the course and apply for reimbursement through the Massachusetts Workforce Training Express Fund website a minimum of three weeks prior to the start of the course to be eligible. The course code for this program is C-15387. To learn more, click here or contact Julia Ekelund at jekelund@necpas.org.

Top Business Tax Planning Strategies

Friday, September 25 2026 9:00am - 10:40am EDT Virtual 2.00 Credits $ Member Price: $109

You could pay $0 for this course!This course qualifies for EA/IRS and CFP credit. If you need EA/IRS credit, please contact Tyler Dion (tdion@necpas.org) after you have registered and provide him your PTIN number. In this continually revised course, tax advisors will be fully updated on the most recent enacted legislation and IRS guidance, as well as major trends on the horizon with a view toward planning considerations. This update course is designed for all practitioners, both those working in public accounting as well as those in private industry, who need the latest information on tax changes. Please Note: Due to content overlap, it is recommended that this course NOT be taken together with BITU. Massachusetts firms/companies with fewer than 50 staff can be reimbursed up to 100% of the cost of training and firms/companies with 50-100 employees can be reimbursed up to 50% of the cost of training. You must register for the course and apply for reimbursement through the Massachusetts Workforce Training Express Fund website a minimum of three weeks prior to the start of the course to be eligible. The course code for this program is C-2253. To learn more, click here or contact Julia Ekelund at jekelund@necpas.org.

Accounting, Audit, and Attest Update for Practitioners with Small-Business Clients

Monday, October 19 2026 9:00am - 4:30pm EDT Virtual 8.00 Credits $ Member Price: $309

You could pay $0 for this course!This course qualifies for EA/IRS and CFP credit. If you need EA/IRS credit, please contact Tyler Dion (tdion@necpas.org) after you have registered and provide him your PTIN number. Specifically tailored for practitioners who not only perform audits but also provide other attest and non-attest services to small and medium-sized businesses, this course is a comprehensive update covering recently issued accounting, auditing, and SSARS standards, including SAS 145 and the quality management standards, as well as other professional guidance impacting small and medium-sized business accountants. The course uses practical examples and illustrations to help you understand and apply the new guidance. Following the release of the FASB's final PIR report for ASC 606, Revenue, in December of 2024, we do a deep dive into the complex revenue recognition standard and findings of the PIR report, review common special purpose frameworks, and discuss the new quality management standards for audits and SSARS engagements. This course will get you up to speed on the things that are most important to your small and medium-sized clients. Massachusetts firms/companies with fewer than 50 staff can be reimbursed up to 100% of the cost of training and firms/companies with 50-100 employees can be reimbursed up to 50% of the cost of training. You must register for the course and apply for reimbursement through the Massachusetts Workforce Training Express Fund website a minimum of three weeks prior to the start of the course to be eligible. The course code for this program is C-15384. To learn more, click here or contact Julia Ekelund at jekelund@necpas.org.

Surgent's Federal Tax Camp

Wednesday, December 2 2026 8:00am - 4:00pm EST Norwood 8.00 Credits $ Member Price: $359

You could pay $0 for this course!This course qualifies for EA/IRS and CFP credit. If you need EA/IRS credit, please contact Tyler Dion (tdion@necpas.org) after you have registered and provide him your PTIN number. Tax practitioners have been hard-pressed to keep up with recent legislation and new IRS guidance. In this course, tax advisors will be fully updated on the most important legislative and regulatory developments of the season as well as major trends and changes in the case law, with a view toward planning considerations. This course is continually updated to reflect enacted legislation. Massachusetts firms/companies with fewer than 50 staff can be reimbursed up to 100% of the cost of training and firms/companies with 50-100 employees can be reimbursed up to 50% of the cost of training. You must register for the course and apply for reimbursement through the Massachusetts Workforce Training Express Fund website a minimum of three weeks prior to the start of the course to be eligible. The course code for this program is C-1758. To learn more, click here or contact Julia Ekelund at jekelund@necpas.org.

Surgent's Federal Tax Camp

Thursday, December 3 2026 8:00am - 4:00pm EST Virtual 8.00 Credits $ Member Price: $359

You could pay $0 for this course!This course qualifies for EA/IRS and CFP credit. If you need EA/IRS credit, please contact Tyler Dion (tdion@necpas.org) after you have registered and provide him your PTIN number. Tax practitioners have been hard-pressed to keep up with recent legislation and new IRS guidance. In this course, tax advisors will be fully updated on the most important legislative and regulatory developments of the season as well as major trends and changes in the case law, with a view toward planning considerations. This course is continually updated to reflect enacted legislation. Massachusetts firms/companies with fewer than 50 staff can be reimbursed up to 100% of the cost of training and firms/companies with 50-100 employees can be reimbursed up to 50% of the cost of training. You must register for the course and apply for reimbursement through the Massachusetts Workforce Training Express Fund website a minimum of three weeks prior to the start of the course to be eligible. The course code for this program is C-1758. To learn more, click here or contact Julia Ekelund at jekelund@necpas.org.

Surgent's Federal Tax Camp

Friday, December 4 2026 8:00am - 4:00pm EST Virtual 8.00 Credits $ Member Price: $359

You could pay $0 for this course!This course qualifies for EA/IRS and CFP credit. If you need EA/IRS credit, please contact Tyler Dion (tdion@necpas.org) after you have registered and provide him your PTIN number. Tax practitioners have been hard-pressed to keep up with recent legislation and new IRS guidance. In this course, tax advisors will be fully updated on the most important legislative and regulatory developments of the season as well as major trends and changes in the case law, with a view toward planning considerations. This course is continually updated to reflect enacted legislation. Massachusetts firms/companies with fewer than 50 staff can be reimbursed up to 100% of the cost of training and firms/companies with 50-100 employees can be reimbursed up to 50% of the cost of training. You must register for the course and apply for reimbursement through the Massachusetts Workforce Training Express Fund website a minimum of three weeks prior to the start of the course to be eligible. The course code for this program is C-1758. To learn more, click here or contact Julia Ekelund at jekelund@necpas.org.

Surgent's Individual Tax Planning Ideas

Friday, December 11 2026 9:00am - 12:30pm EST Virtual 2.00 Credits $ Member Price: $219

You could pay $0 for this course!This course qualifies for EA/IRS and CFP credit. If you need EA/IRS credit, please contact Tyler Dion (tdion@necpas.org) after you have registered and provide him your PTIN number. With the far-reaching changes brought about by recent tax reform, careful planning takes on new importance. This course presents the most important income tax planning ideas wealthy clients and closely held business owners need to consider this year to take advantage of the present and plan for the future. It highlights areas in the income tax return that suggest future opportunities for the individual client. Continuously updated for the latest legislation and IRS guidance. This course qualifies for reimbursement through the state’s Workforce Training Express Fund. Massachusetts firms/companies with fewer than 50 staff can be reimbursed up to 100% of the cost of training and firms/companies with 50-100 employees can be reimbursed up to 50% of the cost of training. You must register for the course and apply for reimbursement through the Massachusetts Workforce Training Express Fund website a minimum of three weeks prior to the start of the course. The course code for this program is C-13050. To learn more, click here or contact Julia Ekelund at jekelund@necpas.org.

Trump Accounts Created by OBBBA: A Comprehensive Guide for Accounting and Finance Professionals

Friday, December 11 2026 1:00pm - 2:40pm EST Virtual 2.00 Credits $ Member Price: $109

You could pay $0 for this course!This course qualifies for EA/IRS and CFP credit. If you need EA/IRS credit, please contact Tyler Dion (tdion@necpas.org) after you have registered and provide him your PTIN number. Many clients are asking their advisors about Trump Accounts, one of the most anticipated yet misunderstood provisions of the One Big Beautiful Bill Act (OBBBA). This program will provide practitioners with the background to be able to advise their clients regarding how Trump Accounts operate. The course will also discuss the comparison between Trump Accounts and other accounts, such as 529 Plans and Roth IRAs. In addition, coverage will be provided on how the pilot program will function to give $1,000 to newborns. Massachusetts firms/companies with fewer than 50 staff can be reimbursed up to 100% of the cost of training and firms/companies with 50-100 employees can be reimbursed up to 50% of the cost of training. You must register for the course and apply for reimbursement through the Massachusetts Workforce Training Express Fund website a minimum of three weeks prior to the start of the course to be eligible. The course code for this program is C-15382. To learn more, click here or contact Julia Ekelund at jekelund@necpas.org.