



NEBRASKA SOCIETY OF
Certified Public Accountants



CPE CATALOG & MEMBER GUIDE

2024



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NESCPA at a Glance

Our Mission

The mission of the Nebraska Society of Certified Public Accountants is to enhance the professional success of the members;
to encourage the maintenance of high professional standards;
to facilitate relationships among the members;
to further the professional knowledge, competence, and performance of the members;
to promote a better understanding of services rendered by members;
to promote the accounting profession; and
to act in a representative capacity for the profession.

For The Record

- ▶ The NESCPA is a highly effective organization headquartered in Lincoln, Neb.
- ▶ The Society had 2,600 members as of April 30, 2024.
- ▶ Society members are employed by 920 organizations located in 105 Nebraska communities.
- ▶ Members reside in 24 different states and the island of Guam.
- ▶ Approximately 130 volunteers serve each year on the Society's boards and committees.
- ▶ The Society offered 8,408 Continuing Professional Education (CPE) courses and conferences in 2023.
- ▶ A total of 2,298 registrants attended CPE through the Society in 2023.
- ▶ The Society has a staff of four full-time employees.



Volunteer

YOU CAN MAKE A DIFFERENCE!

Society Committees

- ▶ Accounting Careers
- ▶ Business & Industry
- ▶ Continuing Professional Education (CPE)
- ▶ Ethics
- ▶ Fall Conference
- ▶ Governmental Accounting & Auditing
- ▶ Legislation
- ▶ Not-For-Profit
- ▶ Political Education
- ▶ Taxation
- ▶ Women In Accounting

Committees meet two to three times per year. To volunteer, email society@nescpa.org.

How You Can Get Involved

As a committee member for the Nebraska Society of CPAs, you have the opportunity to influence a profession that touches the lives of most Nebraskans. Your contributions not only will help shape the future of the CPA profession, but also will provide you with great personal and professional satisfaction.

Help maximize the power and performance of CPAs in Nebraska by selecting from the volunteer opportunities on the left.

All interested members are encouraged to volunteer!

Why Join Nebraska Society of CPAs?



ADVANCE YOUR CAREER & YOUR PROFESSION
THROUGH SOCIETY MEMBERSHIP.

By joining, you receive members-only perks, an exclusive publication, networking opportunities, and a whole lot of exposure for yourself and your organization. Get on board and see the difference!

Learning

Gain a competitive edge with professional education on all the hot topics.

Networking

Meet fellow accounting professionals at Society events.

Visibility

Stand out and get noticed in your profession.

Credibility

Raise your reputation through membership.

Discounts

Increase your purchasing power through members-only pricing on CPE, insurance, shipping, digital printing, job postings, and more.

Advocacy

Gain a say in what happens through the Society's legislative efforts.

Scholarships

Help Nebraska college students and promote the CPA profession.

Contact NESCPA at (402) 476-8482 or society@nescpa.org to learn more about the benefits of membership today!



Education Your Way

WHY CHOOSE THE NEBRASKA SOCIETY OF CPAs FOR YOUR LEARNING AND DEVELOPMENT?

As a 501(c)(6) organization, we are not organized for profit and our net earnings don't benefit shareholders—they fund member programs and initiatives to assist YOU!

Webcasts

Watch and learn via thousands of courses offering engaging content—from tax to cybersecurity, technical skills to management, communications to ethics, and more.

Conferences

Whether you work in audit, tax, not-for-profit, government, business, or industry, we've got the education you need.

In-Person Classes

Nothing beats learning the latest topics in person from quality instructors—plus networking, sharing best practices, and a candy station!

Onsite Training

Bring NESCPA to your office or event and let us take care of the details. Our CPE staff will work with you to determine focus, length, and cost for your onsite training needs.

OnDemand

Anytime, anywhere learning provides you the convenience of starting, stopping, and resuming your course work on your own schedule.

Receive education your way at nescpa.org/cpe.



Advocating for You

FIGHTING FOR THE PROFESSION

FAQs About The NESCPA Political Education Committee

What is NESCPA PEC and why is it important?

The Society's Political Education Committee (PEC) provides direct campaign support to candidates for Nebraska Legislature who value and understand the CPA profession. The PEC helps ensure CPAs have a voice in state government.

Why should I contribute to NESCPA PEC?

Your voluntary contribution helps ensure the CPA profession has a strong voice in the Nebraska Legislature. By joining forces with your fellow NESCPA members through the PEC, you help the Society build alliances with state legislators who directly influence legislation.

Do my NESCPA membership dues fund the PEC?

No. By law, the Society cannot use your dues for contributions to political candidates. CPAs must make all political contributions voluntarily.

Are NESCPA's efforts a duplication of AICPA PAC?

No. AICPA PAC supports candidates for Congress in Washington, D.C. The NESCPA PEC only supports candidates for the Nebraska Legislature.

What if I don't want my money to support a particular party?

NESCPA PEC is nonpartisan in its selection of candidates to support. The PEC considers the quality of candidate when determining who receives support. The PEC Board is member managed and member driven. We welcome the insights and views of our members with respect to candidates and issues.

Every dollar counts! Protect and advance the CPA profession by donating to NESCPA PEC today at nescpa.org/advocacy/contribute.



2024 Conferences

POSITION YOURSELF FOR SUCCESS!

Business, Industry & Innovation Conference, with Memorial Stadium Tour

- ▶ **April 24** | 6 CPE | Champions Club, Lincoln

Financial Institutions Conference

- ▶ **May 21** | 8 CPE | Multi-State Live Webcast

Not-For-Profit & Governmental Accounting Conference

- ▶ **June 17-18** | 16 CPE/2 Ethics | Innovation Campus, Lincoln

ABCs of Business Happy Hour

- ▶ **June 17** | The Scarlet Hotel, Innovation Campus, Lincoln

Insurance Industry Conference

- ▶ **June 20** | 7 CPE/1 Ethics | Multi-State Live Webcast

Audits of School Districts Course

- ▶ **July 10** | 8 CPE/1 Ethics | Fonner Park, Grand Island

Agriculture Tax & Accounting Conference

- ▶ **Aug. 14** | 8 CPE | Multi-State Live Webcast

Women in Accounting Summit

- ▶ **Aug. 28** | 6 CPE | Riverview Lodge, Mahoney State Park, Ashland

Fall Conference & Annual Meeting

- ▶ **Oct. 29-30** | 16 CPE/2 Ethics | Riverview Lodge, Mahoney State Park, Ashland

Tax Update for Individuals & Businesses

- ▶ **Dec. 9-10** | 16 CPE | Round the Bend Ballroom, Ashland

Learn more and register at nescpa.org/cpe.



**BECOME
A
SPONSOR**

Sponsorship & Exhibit Opportunities

Increase your organization's exposure, heighten your brand recognition, and drive sales by claiming your sponsorship or exhibit space at one of the Nebraska Society of CPAs' annual conferences or events. Each opportunity is designed to help your corporate message effectively reach Nebraska's CPAs.

Speaker Sponsorship—\$2,000 (Minimum)

- ▶ Company logo on all event promotion emails, social media promotions, and conference materials
- ▶ Company signage will be placed at each table during the event
- ▶ Mention of your company during the conference
- ▶ Complimentary attendance for one company representative

Food & Beverage Sponsorship—\$1,000

- ▶ Company logo on signage near food and beverages—choose from coffee, breakfast, lunch, snacks, or reception, if applicable
- ▶ Company logo on conference materials
- ▶ Mention of your company during the conference
- ▶ Complimentary attendance for one company representative

Conference Exhibitor—\$750

- ▶ Company logo on conference materials
- ▶ Tabletop display area
- ▶ Opportunity to provide giveaways to attendees

Other Sponsorships—\$500

- ▶ Charging Station or Candy Station Sponsorship
- ▶ Company logo on signage at Station
- ▶ Mention of your company during the conference

Become a Conference Exhibitor or Sponsor today by contacting Society Vice President Kelly Ebert at (402) 476-8482 or kelly@nescpa.org.



About CPE

All of the Society's CPE courses and conferences, along with thousands of partner webcasts, are listed at nescpa.org/cpe.

Society Membership Discounts

Society membership provides you with a \$60 discount on all Society-sponsored courses and conferences. In addition, the Society offers **Early Bird Pricing** for individuals attending a Nebraska Society event. **Standard Pricing** goes into effect 30 days prior to the event. **All fees listed in this booklet display Standard Pricing.**

Three Ways To Register & Pay

ONLINE at nescpa.org/cpe – select a course, complete the registration form, and pay with a credit card.

MAIL a completed registration form with credit card information or a check made payable to:

The Nebraska Society of CPAs
7435 O Street, Suite 100
Lincoln, NE 68510



www.nescpa.org/cpe

FAX a completed registration form with credit card information to the Society at (402) 476-8731.

Registration Confirmations

You should receive a registration confirmation via email two days prior to the course. Any registrant may substitute another individual for his or her registration up to the beginning of the first morning session of the event.

Be sure to review your confirmation carefully, as starting times and locations may change.

No Shows

Those who register for an event and do not attend are responsible for the event fee and will receive the course materials.

Society Cancellations

The Society may cancel an event due to insufficient enrollment, inclement weather, or other circumstances beyond the Society's control. In these cases, the amount paid will be placed as a credit on the registrant's account to attend another Society-sponsored event. The registrant has the option of requesting a refund.

If the event is cancelled due to insufficient enrollment, the Society will contact each registrant at least five days prior to the event.

In the case of inclement weather, the Society will contact each registrant as soon as possible by email or phone. All cancellations will be posted on the Society website.

Registrant Cancellations

If a registrant needs to cancel his/her registration, the registrant must provide a written notice to the Society via email at society@nescpa.org.

Cancellations received in the Society office 15 days or less prior to the event date will receive an account credit minus a \$50 cancellation fee. Except in special circumstances, refunds will not be granted to those attempting to cancel registrations less than six days prior to the event date.

Specific Needs

Please notify the office at (402) 476-8482 or kelly@nescpa.org at least one week prior to an event if you have any special dietary requirements (for full-day courses) or other specific needs; we will do our best to accommodate you.

Parking

Parking is generally but not always provided with event fees. If the event is held at Mahoney State Park, be sure to sign the sign-in sheet at the information booth at the park entrance to obtain the daily mandatory parking pass. Review your registration confirmation for parking specifics.

Lodging

Special lodging rates may be available for in-person courses. Please contact Kelly at the Society office at (402) 476-8482 or kelly@nescpa.org.

What To Wear

Business casual attire is recommended for in-person courses. Because meeting room temperatures are difficult to control, we recommend dressing in layers to ensure comfort.

Attendance Verification

At the conclusion of in-person CPE events, a CPE attendance verification form will be distributed for all attendees to sign. **The Nebraska Society office can only verify attendance if the form has been signed.**

All webcast courses use a form of online prompts during the broadcast for verification of attendance.

CPE Credit

All courses listed in this catalog have been submitted to and approved by the Nebraska Board of Public Accountancy for recommended CPE credit. CPE certificates may be downloaded for each course attended through the “My CPE Tracker” at nescpa.org/my-cpe. The “My CPE Tracker” also allows you to download annual CPE transcripts at any time, and to include self-entered CPE courses to your transcript.

Information For IRS Enrolled Agents

The Nebraska Society of CPAs partners with the following IRS-approved continuing education providers to provide continuing education for Enrolled Agents.

- ▶ American Institute of CPAs (AICPA) – AICPACompliance@aicpa.org
- ▶ CalCPA Education Foundation – (800) 922-5272
- ▶ Surgent McCoy CPE Inc. – info@surgent.com / (800) 778-7436
- ▶ The Garvs LLC dba The Tax U – (623) 535-9760
- ▶ Van Der Aa Tax Ed LLC – info@vandraatax.com / (248) 770-6587

Nebraska’s CPE Rules

The rules for Continuing Professional Education for Nebraska CPAs are located within Title 288, Chapter 8, of the State Board regulations, and CPE Guidelines may be viewed at nbpa.nebraska.gov under the CPE menu. **Most noted among the rules is a four-hour ethics requirement for biennial license renewals (80 CPE hours) and reinstatements (120 CPE hours).** In addition, 16 hours of self-determined Personal Development courses related to the CPA’s current employment may be reported. The rules also clarify the number of CPE hours allowed for self-study, faculty, and college semester credit hours, and grant the Nebraska Board of Public Accountancy the authority to request documentation from a permit holder for five years from the individual’s last reporting period. If you have any questions about the CPE rules, contact the State Board at (402) 471-3595 or view the rules at nbpa.nebraska.gov.

Electronic CPE Materials

The Society provides an electronic version of course materials at nescpa.org/my-cpe. Once ematerials have been downloaded, no cancellation, transfer, or refund will be available.

Surveys

Surveys will be emailed to all attendees after every CPE course and conference. The Society CPE Committee, instructors, and staff take your comments and concerns seriously, as we strive to provide you with high-quality, cost-effective education. You may also email kelly@nescpa.org with comments and concerns.

Use Of Photo & Video

Attendance at or participation in NESCPA events constitutes an agreement that any photos, videos, audio, or other visual or audio reproduction obtained during the event can be used for promotion by the NESCPA. NESCPA is released from any liability connected with the use of event pictures or voices.

Disclaimer

The information and suggestions presented at courses and conferences sponsored by the Nebraska Society of CPAs are subject to constant change and, therefore, should only serve as a foundation for further investigation and study. Further, any forms presented at such courses or conferences are samples only and are not necessarily authoritative. All information, procedures, and forms contained or used in such seminars or conferences should be carefully reviewed and should serve as a guide for use in specific situations. Speakers and discussion leaders are expressing their own views, or those of event authors. Such views and opinions have not been approved or endorsed by the Nebraska Society of CPAs.

The Nebraska Society of CPAs reserves the right to make changes to prices, dates, locations, and speakers at any time without notice. Early registration helps avoid cancellations. The Nebraska Society of CPAs does not assume financial responsibility for penalties or expenses incurred by registrants who must cancel travel arrangements due to course cancellation.

Every effort has been made to avoid error and omissions in every phase of this work. As the publisher, the Nebraska Society of CPAs assumes no liability of any kind in connection with this publication.



Course Locations

2024 courses have been scheduled at the following locations and facilities. You will find the location for each course at nescpa.org/cpe.

Ashland

Crete Carrier Riverview Lodge Mahoney State Park

28500 West Park Highway
(I-80 Exit #426)
Ashland, NE 68003
(402) 944-2523

Round the Bend Ballroom

30801 East Park Highway
(I-80 Exit #426)
Ashland, NE 68003
(402) 944-9974

Grand Island

Fonner Park Convention Center

700 East Stolley Park Road
Grand Island, NE 68801
(308) 382-4515

Lincoln

Courtyard by Marriott Downtown/Haymarket

808 R Street
Lincoln, NE 68508
(402) 904-4800

Nebraska Innovation Campus Conference Center

2021 Transformation Drive
Lincoln, NE 68508
(402) 472-8937

The Scarlet Hotel

2101 Transformation Drive
Lincoln, NE 68508
(531) 300-6300

South Sioux City

South Sioux City Marriott Riverfront

385 East 4th Street
South Sioux City, NE 68776
(402) 494-4000

CPE/Conference Registration Form

To register for any of the following courses:

Download the
Printable Form



<https://tinyurl.com/eventscpa>

Register
Online



<https://www.nescpa.org/cpe>

Nebraska Society of CPAs 2024 Course Calendar

Date	Course Name Course No. / Vendor / Location	CPE/Ethics Credit	Member Fee
MAY 2024			
7	Excel Essentials for Staff Accountants 2411-1 / K2 Enterprises / Webcast	8	\$324
8	Excel Tips, Tricks & Techniques for Accountants 2411-2 / K2 Enterprises / Webcast	8	\$324
9	Advanced Excel 2411-3 / K2 Enterprises / Webcast	8	\$324
13	Governmental Accounting & Auditing Update 2412 / Nebraska Society of CPAs / NESCPA Office, Lincoln	8	\$324
13-16	Level II: Semi-Senior Staff Training 24AH12 / AHI / Webcast	24	\$794
14	Nonprofit Accounting & Financial Reporting 2413 / Nebraska Society of CPAs / NESCPA Office, Lincoln	8	\$324
16	Budgeting & Forecasting Tools & Techniques 2411-4 / K2 Enterprises / Webcast	8	\$324
17	Case Studies in Fraud & Technology Controls 2411-5 / K2 Enterprises / Webcast	8	\$324
20-23	Level III: Beginning in Charge Training 24AH13 / AHI / Webcast	24	\$794
21	Financial Institutions Conference 2414 / Iowa Society of CPAs / Webcast		
21	Current Issues in Accounting & Auditing: An Annual Update 24MW01 / Surgent / Webcast	4	\$204

21	Technology Trends & Hot Topics Impacting the Accounting Profession 24MW02 / Surgent / Webcast	4	\$204
22	Artificial Intelligence for Accounting & Finance Professionals 24MW03 / Surgent / Webcast	2	\$98
22	Guide to the Corporate Transparency Act for Accounting & Finance Professionals 24MW04 / Surgent / Webcast	2	\$98
28	AI & Data Analytics for Auditing: The Big Picture 24AH14 / AHI / Webcast	2	\$98
28	Level V: Advanced Management & Leadership Essentials 24AH15 / AHI / Webcast	2	\$98
30	Accounting Data Analytics 24AH16 / AHI / Webcast	2	\$98

JUNE 2024

3-6	Level V: Advanced Management & Leadership Essentials 24AH17 / AHI / Webcast	16	\$674
6	Level IV: Management & Leadership Essentials Training 24AH18 / AHI / Webcast	8	\$494
13-14	K2's 2024 Standard Technology Conference 2409 / Nebraska Society of CPAs / Webcast	16	\$504
14	CFO/Controller's Roadmap to Success: Integrated Planning, Forecasting & Budgeting 2416 / Surgent / Webcast	8	\$324
17	Not-For-Profit & Governmental Accounting Conference - 1st DAY ONLY 240301 / Nebraska Society of CPAs / Innovation Campus, Lincoln	8/2	\$349
17-18	Not-For-Profit & Governmental Accounting Conference 2403 / Nebraska Society of CPAs / Innovation Campus, Lincoln	16/2	\$504
19	Business Intelligence, Featuring Microsoft's Power BI Tools 2411-6 / K2 Enterprises / Webcast	8	\$324
19	Performing Effective & Efficient Audit Sampling & Analytical Procedures 24MW05 / Surgent / Webcast	4	\$204
19	Testing & Documenting ICFR & ITGCs 24MW06 / Surgent / Webcast	4	\$204
20	K2's Accountant's Artificial Intelligence Conference 2408 / Nebraska Society of CPAs / Webcast	8	\$349
20	Insurance Industry Conference 2415 / Iowa Society of CPAs / Webcast	7/1	\$335
20	Excel Pivot Tables for Accountants 2411-7 / K2 Enterprises / Webcast	8	\$324
20	Ethical Considerations for CPAs 24MW07 / Surgent / Webcast	4/4	\$204
20	Understanding Blockchain, Bitcoin & Digital Assets & Their Accounting Intricacies 24MW08 / Surgent / Webcast	2	\$98
21	Excel Best Practices 2411-8 / K2 Enterprises / Webcast	8	\$324
21	Complying With the Corporate Transparency Act: A Guide for Client Protection 24MW09 / Werner-Rocca / Webcast	2	\$98

■ Webcast ■ On-Location

Date	Course Name Course No. / Vendor / Location	CPE/Ethics Credit	Member Fee
21	Cybersecurity Issues for the Professional 24MW10 / Werner-Rocca / Webcast	2	\$98
24	Accountant's Guide to QuickBooks 2411-9 / K2 Enterprises / Webcast	8	\$324
25	Better Productivity Through Artificial Intelligence 2411-10 / K2 Enterprises / Webcast	4	\$204
25	Emerging Technologies for Accountants, Including Blockchain & Cryptocurrencies 2411-11 / K2 Enterprises / Webcast	4	\$204
25	Guide & Update to Compilations, Reviews & Preparations 24MW11 / Surgent / Webcast	4	\$204
25	Preparing & Reviewing Client Prepared Financial Statements & General Attest Engagements 24MW12 / Surgent / Webcast	4	\$204
25	AI & Data Analytics for Auditing: The Big Picture 24AHI9 / AHI / Webcast	2	\$98
25	Level V: Advanced Management & Leadership Essentials 24AHI10 / AHI / Webcast	2	\$98
26	Paperless Office 2411-12 / K2 Enterprises / Webcast	8	\$324
26	Auditing Complex Management Estimates 24MW13 / Surgent / Webcast	4	\$204
27	Ethics & Technology 2411-13 / K2 Enterprises / Webcast	4/4	\$204
27	Mastering Advanced Excel Functions 2411-14 / K2 Enterprises / Webcast	4	\$204
27	Accounting Data Analytics 24AHI11 / AHI / Webcast	2	\$98
28	Technology for CPAs: Don't Get Left Behind 2411-15 / K2 Enterprises / Webcast	8	\$324
28	2024 Mid-Year Individual Tax Update 24MW14 / Werner-Rocca / Webcast	4	\$204
28	2024 Mid-Year Business Tax Update 24MW15 / Werner-Rocca / Webcast	4	\$204

JULY 2024

10	Audits of School Districts 2417 / Nebraska Society of CPAs / Fonner Park, Grand Island	8	\$324
15-18	Level I: Basic Staff Training 24AHI12 / AHI / Webcast	24	\$794
16	Microsoft 365/Office 365: All the Things You Need to Know 2411-16 / K2 Enterprises / Webcast	8	\$324
16	Farm Taxation Update 24MW16 / Paul Neiffer / Webcast	8	\$324
17	Small Business Internal Controls, Security & Fraud Prevention & Detection 2411-17 / K2 Enterprises / Webcast	8	\$324
18	Excel Charting & Visualizations 2411-18 / K2 Enterprises / Webcast	4	\$204

18	Best Word, Outlook & PowerPoint Features 2411-19 / K2 Enterprises / Webcast	4	\$204
23	AI & Data Analytics for Auditing: The Big Picture 24AH113 / AHI / Webcast	2	\$98
23	Level V: Advanced Management & Leadership Essentials 24AH114 / AHI / Webcast	2	\$98
25	Accounting Data Analytics 24AH115 / AHI / Webcast	2	\$98
30	An Accountant's Guide to Blockchain & Cryptocurrency 2411-20 / K2 Enterprises / Webcast	4	\$204
30	Artificial Intelligence for Accounting & Financial Professionals 2411-21 / K2 Enterprises / Webcast	4	\$204
31	Advanced QuickBooks Tips & Techniques 2411-22 / K2 Enterprises / Webcast	4	\$204
31	Case Studies in Fraud & Technology Controls 2411-23 / K2 Enterprises / Webcast	4	\$204

AUGUST 2024

8	Yellow Book: Staying Compliant With Government Auditing Standards 24MW17 / AICPA / Webcast	8	\$324
14	Agriculture Tax & Accounting Conference 2407 / Nebraska Society of CPAs / Webcast	8	\$409
15	Critical Issues That CPAs in Industry Will Need to Face This Year 24MW18 / Surgent / Webcast	4	\$204
15	Accounting for Changes in Accounting Principles & Error Corrections 24MW19 / Surgent / Webcast	2	\$98
20	Business Continuity: Best Practices for Managing the Risks 2411-24 / K2 Enterprises / Webcast	8	\$324
20	Construction Industry GAAP Review & Contract WIP Reporting & Analytics 2418 / Iowa Society of CPAs / Webcast	4	\$204
21	Microsoft Access: Tables, Queries & Beyond 2411-25 / K2 Enterprises / Webcast	8	\$324
21	Create Reports That Matter 24MW20 / The Knowledge Institute / Webcast	8	\$324
21	Key Tax Issues Facing Business & Industry 2419 / Van Der Aa Tax Ed / Round the Bend, Ashland	8	\$324
22	QuickBooks for Accountants 2411-26 / K2 Enterprises / Webcast	8	\$324
22	Partnership & S Corporation Essentials: Reporting Basis & More 2420 / Van Der Aa Tax Ed / Round the Bend, Ashland	8	\$324
23	Year-End Tax Planning: Thinking Outside the Box 2421 / Van Der Aa Tax Ed / Round the Bend, Ashland	8	\$324
26	Women's Leadership Series: Women's Equality Day 2410-3 / Virginia Society of CPAs / Webcast	1	\$49
26	The Inflation Reduction Act's Changes to Auto & Energy-Related Tax Credits 24MW21 / Surgent / Webcast	2	\$98

■ Webcast ■ On-Location

Date	Course Name Course No. / Vendor / Location	CPE/Ethics Credit	Member Fee
26	Update on the SECURE 2.0 Act 24MW22 / Surgent / Webcast	2	\$98
27	Real Estate Taxation: Critical Considerations 24MW23 / Surgent / Webcast	4	\$204
27	What Practitioners Need to Know About Estate Planning & Administering a Client's Estate 24MW24 / Surgent / Webcast	3	\$164
27	AI & Data Analytics for Auditing: The Big Picture 24AH116 / AHI / Webcast	2	\$98
27	Level V: Advanced Management & Leadership Essentials 24AH117 / AHI / Webcast	2	\$98
28	Women in Accounting Summit 2404 / Nebraska Society of CPAs / Riverview Lodge, Ashland	6	\$344
29	Accounting Data Analytics 24AH118 / AHI / Webcast	2	\$98

SEPTEMBER 2024

3-6	Level I: Basic Staff Training 24AH119 / AHI / Webcast	24	\$794
11	Fraud Prevention 24MW25 / The Knowledge Institute / Webcast	8	\$324
11	AI Ethics: Balancing on the Tightrope 2422 / Virginia Society of CPAs / Webcast	2/2	\$98
12	Accounting & Auditing Update for Not-for-Profits 24MW26 / AICPA / Webcast	8	\$324
16-19	Level II: Semi-Senior Staff Training 24AH120 / AHI / Webcast	24	\$794
17	How to Settle a Client's Estate 2423 / Surgent / Webcast	8	\$324
19	Avoiding Deficiencies in Peer Reviews: Focus on Engagement Quality 24MW27 / Surgent / Webcast	4	\$204
20	Audit Documentation Requirements 24MW28 / Surgent / Webcast	2	\$98
20	Guide to the AICPA Quality Management Standards 24MW29 / Surgent / Webcast	2	\$98
24	Next Generation Excel Reporting 2411-27 / K2 Enterprises / Webcast	8	\$324
24	AI & Data Analytics for Auditing: The Big Picture 24AH121 / AHI / Webcast	2	\$98
24	Level V: Advanced Management & Leadership Essentials 24AH122 / AHI / Webcast	2	\$98
25	Data Analytics for Accountants & Auditors 2411-28 / K2 Enterprises / Webcast	4	\$204
25	Implementing Internal Controls in QuickBooks Environments 2411-29 / K2 Enterprises / Webcast	4	\$204
25	Best Practices in Not-for-Profit Accounting & Reporting 24MW30 / Surgent / Webcast	4	\$204
25	The Most Critical Challenges in Not-for-Profit Accounting Today 24MW31 / Surgent / Webcast	4	\$204

26	Improving Productivity With Microsoft 365/Office 365 Cloud Applications 2411-30 / K2 Enterprises / Webcast	4	\$204
26	Introduction to Excel Macros 2411-31 / K2 Enterprises / Webcast	4	\$204
26	Maximizing Your Social Security Benefits 24MW32 / Surgent / Webcast	4	\$204
26	Accounting Data Analytics 24AHI23 / AHI / Webcast	2	\$98
27	What Tax Practitioners Need to Know About Medicare 24MW33 / Surgent / Webcast	2	\$98
27	Social Security: Dispelling Common Myths With Essential Truths 24MW34 / Surgent / Webcast	2	\$98

OCTOBER 2024

11	Presentation Skills for Success 24MW35 / The Knowledge Institute / Webcast	8	\$324
17	Federal Tax Update 24MW36 / Surgent / Webcast	4	\$204
17	S Corporations: Key Issues, Compliance & Tax Strategies 2424 / AICPA / Webcast	8	\$324
17	Level IV: Management & Leadership Essentials Training 24AHI24 / AHI / Webcast	8	\$494
17-18	AHI Staff Training: Basic (Level 1) 24MW37 / AHI / Webcast	16	\$674
17-18	Level I: Basic Staff Training 24MW75 / AHI / Webcast	16	\$674
18	Social Security & Medicare: Planning for You & Your Clients 2425 / Surgent / Webcast	8	\$324
21	Accounting & Auditing Update for Small Businesses 24MW38 / AICPA / Webcast	8	\$324
21	Advanced Taxation LLCs & Partnerships 2426 / AICPA / Webcast	8	\$324
21-24	Level I: Basic Staff Training 24AHI25 / AHI / Webcast	24	\$794
23	Construction Industry Financial Reporting, Benchmarking & Basic Taxation 2427 / Iowa Society of CPAs / Webcast	4	\$204
24	The Top Five Tax Issues in Dealing With LLCs & Partnerships 24MW39 / Surgent / Webcast	4	\$204
28	Accounting & Auditing Update for the Real World 2428 / Iowa Society of CPAs / Webcast	8	\$324
28-31	Level III: Beginning in Charge Training 24AHI26 / AHI / Webcast	24	\$794
29	AI & Data Analytics for Auditing: The Big Picture 24AHI27 / AHI / Webcast	2	\$98
29	Level V: Advanced Management & Leadership Essentials 24AHI28 / AHI / Webcast	2	\$98
29	Microsoft Teams 2411-32 / K2 Enterprises / Webcast	4	\$204

■ Webcast ■ On-Location

Date	Course Name Course No. / Vendor / Location	CPE/Ethics Credit	Member Fee
29	Securing Your Data: Practical Tools for Protecting Information 2411-33 / K2 Enterprises / Webcast	4	\$204
29	Interpreting the New Revenue Recognition Standard: What All CPAs Need to Know 24MW40 / AICPA / Webcast	4	\$204
29	The Bottom Line on the New Lease Accounting Requirements 24MW41 / AICPA / Webcast	4	\$204
29	Preparation, Compilation & Review Update for the Local Firm 2429 / Iowa Society of CPAs / Webcast	8	\$324
29-30	Fall Conference & Annual Meeting 2405 / Nebraska Society of CPAs / Riverview Lodge, Ashland	16	\$504
30	Small Business Accounting Shootout 2411-34 / K2 Enterprises / Webcast	4	\$204
30	Technology Update 2411-35 / K2 Enterprises / Webcast	4	\$204
30	Multistate Income Tax Issues 24MW42 / Surgent / Webcast	4	\$204
30	Individual Income Tax Update 24MW43 / Surgent / Webcast	4	\$204
31	Testing & Auditing Excel Workbooks 2411-36 / K2 Enterprises / Webcast	4	\$204
31	Top PDF Features You Should Know 2411-37 / K2 Enterprises / Webcast	4	\$204
31	Accounting Data Analytics 24AHI29 / AHI / Webcast	2	\$98

NOVEMBER 2024

1	Applying the Uniform Guidance in Your Single Audits 24MW44 / AICPA / Webcast	8	\$324
1	Real World Tax Update for Individuals & Entities 2430 / Real World Seminars of Georgia / Marriott Riverfront, South Sioux City	8	\$324
4	The Complete Trust Workshop 2431 / Surgent / Webcast	8	\$324
5	The Complete Guide to Payroll Taxes & 1099 Issues 2432 / Surgent / Webcast	8	\$324
7	Federal Tax Update: Individual & Business 2433W / Iowa Society of CPAs / Webcast	8	\$324
11-12	AHI Staff Training: Semi Senior (Level 2) 24MW45 / AHI / Webcast	16	\$674
11-12	Level II: Semi-Senior Staff Training 24MW76 / AHI / Webcast	16	\$674
13	Predicting the Future 24MW46 / The Knowledge Institute / Webcast	8	\$324
14	Employer's Handbook: Health Care, Retirement & Fringe Benefit Tax Issues 24MW47 / Surgent / Webcast	4	\$204
14	Construction Contractors: Accounting & Auditing 24MW48 / AICPA / Webcast	8	\$324

18	Select Estate & Life Planning Issues for the Middle-Income Client 2441 / Surgent / Webcast	4	\$204
18-21	Level IV: Management & Leadership Essentials Training 24AH130 / AHI / Webcast	24	\$794
19	Women's Leadership Series: Women's Entrepreneurship Day 2410-4 / Virginia Society of CPAs / Webcast	1	\$49
19	Working Remotely: The New Normal 2411-38 / K2 Enterprises / Webcast	4	\$204
19	Advanced QuickBooks Tips & Techniques 2411-39 / K2 Enterprises / Webcast	4	\$204
19	Construction Contractors: Non-Revenue & Non-Lease Accounting Considerations 24MW49 / AICPA / Webcast	4	\$204
19	Construction Contractors: Accounting & Financial Reporting Issues 24MW50 / Surgent / Webcast	4	\$204
20	Excel Tips, Tricks & Techniques for Accountants 2411-40 / K2 Enterprises / Webcast	8	\$324
21	Advanced Excel 2411-41 / K2 Enterprises / Webcast	8	\$324
21	Buying & Selling a Business: Tax & Structuring Overview 24MW51 / Surgent / Webcast	4	\$204
21	A Complete Tax Guide to Exit Planning 24MW52 / Surgent / Webcast	2	\$98
21	Accounting Data Analytics 24AH131 / AHI / Webcast	2	\$98
22	Annual Update for Accountants & Auditors 2434 / AICPA / Webcast	8	\$324
25	Section 754 Step-Up in Basis: Understanding the Tax Issues for Partnerships & LLCs 24MW53 / Surgent / Webcast	2	\$98
26	Non-GAAP Financial Statement Options: Cash, Modified Cash & Tax Basis 24MW54 / Surgent / Webcast	4	\$204
26	Surgent's Individual Tax Planning Ideas 24MW55 / Surgent / Webcast	4	\$204
26	AI & Data Analytics for Auditing: The Big Picture 24AH132 / AHI / Webcast	2	\$98
26	Level V: Advanced Management & Leadership Essentials 24AH133 / AHI / Webcast	2	\$98

DECEMBER 2024

2	This Year's Best Income Tax, Estate Tax & Financial Planning Ideas 2435 / Surgent / Webcast	8	\$324
4	QuickBooks for Accountants 2411-42 / K2 Enterprises / Webcast	8	\$324
4	Representing a Client in an IRS Audit 24MW56 / Surgent / Webcast	3	\$164
5	Small Business Internal Controls, Security & Fraud Prevention & Detection 2411-43 / K2 Enterprises / Webcast	8	\$324

■ Webcast ■ On-Location

Date	Course Name Course No. / Vendor / Location	CPE/Ethics Credit	Member Fee
5	Preparing Individual Tax Returns for New Staff & Paraprofessionals 2436 / Surgent / Webcast	8	\$324
5-6	AHI Staff Training: Beginning in Charge (Level 3) 24MW57 / AHI / Webcast	16	\$674
5-6	Level III: Beginning in Charge Training 24MW77 / AHI / Webcast	16	\$674
6	Key Partnership & S Corporation Tax Planning Strategies 24MW58 / Surgent / Webcast	4	\$204
6	Tax Loss Limitations Imposed on Individuals & Pass-Through Entities 24MW59 / Surgent / Webcast	3	\$164
9	Excel Essentials for Staff Accountants 2411-44 / K2 Enterprises / Webcast	8	\$324
9-10	Two-Day Federal Tax Update: Individual & Business 2406 / The Tax U / Round the Bend, Ashland	16	\$535
9-12	Level V: Advanced Management & Leadership Essentials 24AHI34 / AHI / Webcast	16	\$674
10	Technology for CPAs: Don't Get Left Behind 2411-45 / K2 Enterprises / Webcast	8	\$324
11	Excel PivotTables for Accountants 2411-46 / K2 Enterprises / Webcast	8	\$324
11	Finance & Innovation: Reinvent Your Department & Your Company 24MW60 / The Knowledge Institute / Webcast	8	\$324
12	Excel Best Practices 2411-47 / K2 Enterprises / Webcast	8	\$324
13	Better Productivity Through Artificial Intelligence 2411-48 / K2 Enterprises / Webcast	4	\$204
13	Ethics & Technology 2411-49 / K2 Enterprises / Webcast	4	\$204
16	Excel Charting & Visualizations 2411-50 / K2 Enterprises / Webcast	4	\$204
16	Mastering Advanced Excel Functions 2411-51 / K2 Enterprises / Webcast	4	\$204
16	Financial Statement Disclosures: A Guide for Small & Medium-Sized Businesses 24MW61 / Surgent / Webcast	4	\$204
16	Securing a Comfortable Retirement 24MW62 / Surgent / Webcast	4	\$204
16	Innovative Forecasting & Budgeting: Moving Beyond the Traditional Techniques 24MW63 / Surgent / Webcast	4	\$204
16	S Corporation, Partnership & LLC Tax Update 24MW64 / Surgent / Webcast	4	\$204
16	New Revised 2024 Yellow Book 2437 / Nebraska Society of CPAs / NESCPA Office, Lincoln	8	\$324
17	Microsoft 365/Office 365: All the Things You Need to Know 2411-52 / K2 Enterprises / Webcast	8	\$324
17	Current Issues in Accounting & Auditing: An Annual Update 24MW65 / Surgent / Webcast	4	\$204

17	Reviewing Individual Tax Returns: What Are You Missing? 24MW66 / AICPA / Webcast	4	\$204
17	Ethical Considerations for CPAs 24MW67 / Surgent / Webcast	4/4	\$204
17	IRS Tax Examinations & Hot Issues 24MW68 / Surgent / Webcast	4	\$204
17	Governmental Accounting & Auditing Update 2438 / Nebraska Society of CPAs / NESCPA Office, Lincoln	8	\$324
17	AI & Data Analytics for Auditing: The Big Picture 24AHI35 / AHI / Webcast	2	\$98
17	Level V: Advanced Management & Leadership Essentials 24AHI36 / AHI / Webcast	2	\$98
18	Next Generation Excel Reporting 2411-53 / K2 Enterprises / Webcast	8	\$324
18	Reviewing Partnership Tax Returns: What Are You Missing? 24MW69 / AICPA / Webcast	4	\$204
18	Annual FASB Update & Review 24MW70 / Surgent / Webcast	4	\$204
18	Introduction to Forensic Accounting 24MW71 / Surgent / Webcast	4	\$204
18	Reviewing S Corporation Tax Returns: What Are You Missing? 24MW72 / AICPA / Webcast	4	\$204
19	Federal Tax Update for Business & Individual 2439 / Van Der Aa Tax Ed / Courtyard By Marriott, Lincoln	8	\$324
19	Accounting Data Analytics 24AHI37 / AHI / Webcast	2	\$98
20	Federal Tax Update for Business & Individual 2440 / Van Der Aa Tax Ed / Fonner Park, Grand Island	8	\$324
30	Case Studies in Fraud & Technology Controls 2411-54 / K2 Enterprises / Webcast	4	\$204
30	Artificial Intelligence for Accounting & Financial Professionals 2411-55 / K2 Enterprises / Webcast	4	\$204
31	Accountant's Guide to QuickBooks 2411-56 / K2 Enterprises / Webcast	8	\$324

JANUARY 2025

6-9	Level I: Basic Staff Training 24AHI38 / AHI / Webcast	24	\$794
7	AI & Data Analytics for Auditing: The Big Picture 24AHI39 / AHI / Webcast	2	\$98
7	Level V: Advanced Management & Leadership Essentials 24AHI40 / AHI / Webcast	2	\$98
8	Getting Ready for Busy Season: Key Changes Every Tax Practitioner Should Know 24MW73 / Surgent / Webcast	4	\$204
9	Accounting Data Analytics 24AHI41 / AHI / Webcast	2	\$98
13-14	Federal Tax Update With Ron Roberson 24MW74 / TaxSpeaker / Webcast	16	\$535

■ Webcast ■ On-Location

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From the Beginning

Looking Back

The Nebraska Society of CPAs traces its beginnings to March 10, 1908, at the Millard Hotel in Omaha, where several public accountants initially gathered together and over the next few years organized under the name Nebraska State Association of Public Accountants. Although the group adopted a constitution and bylaws, and formed committees, it did not incorporate. The first elected chairman of the association was J.M. Gilchrist, who held the first CPA certificate in Nebraska and whose descendants are still active in the Society. Along with Gilchrist, other founders of the association were J.W. Tulleys (Cert. No. 3), R.F. Svoboda (Cert. No. 4), R.B. Merriam (Cert. No. 5), E.A. Dworak (Cert. No. 6), Emil Ganz (Cert. No. 8), E.J. Robinson (Cert. No. 9), A.L. Searle (Cert. No. 11), and George W. Holbrook (Cert. No. 14).

Twenty years later, on July 23, 1928, the Nebraska Society of Certified Public Accountants was officially established when six public accountants met and approved the Society's Articles of Incorporation. Signing as incorporators of the Society were Henry C. Moeller (Cert. No. 18) of Lincoln, who would eventually become the Society's first president, G. Lawrence Greenfield (Cert. No. 28) of Omaha, Raymond H. Walker (Cert. No. 35) of Lincoln, Calvin B. Remmington (Cert. No. 36) of Lincoln, Wayne McPherran (Cert. No. 47) of Omaha, and Harry E. Judd (Cert. No. 48) of Lincoln.

Early Growth

The Society grew slowly at first. In 1938, Society records reflect only 23 members; that number grew to 52 in 1948, stretching to 207 in 1958. In 1968, the membership grew to 320. By 1970, the Society had expanded to 510 members. Then, it took a major jump, reaching 1,390 by 1980. Part of the reason for the growth in the 1970s was the Nebraska Legislature's passage of mandatory continuing education for licensed practitioners in 1971. Nebraska was the first state in the nation to pass such legislation, which led the Society to sponsor increasing numbers of Continuing Professional Education (CPE) courses for its members.

The late 1950s were a turning point for the Society. In 1957, the Nebraska Legislature passed the Nebraska Public Accountancy Act and, in 1958, Arnold Magnuson was hired as a part-time staff person. Over the next 32 years, Magnuson would guide the growth and expansion of the Society and eventually become its full-time executive vice president.

Magnuson was the only employee until October 1972; at that time, the Society opened its first executive office located in the Stuart Building in Lincoln, employing Magnuson as the executive director and one secretary. Today, the Society has four employees.

In 1985, the Society offices moved to the Roman L. Hruska Law Center west of the State Capitol. When Magnuson fully retired in 1992, the membership had grown to approximately 2,400. In 1990, Dan Vodvarka was named the Society's executive vice president. In 1995, his title was changed to president, and the highest elected Society office was changed to chairman of the board. Vodvarka retired in October 2018 after 28 years of service to the Society. In July 2018, Joni Sundquist began serving as president and executive director of the Society. In January 2020, the Society offices moved to the Corporate Centre Office Park at 7435 O Street, Suite 100, in Lincoln.

Our Vision

Our vision is to be the leading resource and advocate for the CPA profession in Nebraska.

Our Mission

Our mission is to enhance the professional success of the members; to encourage the maintenance of high professional standards; to facilitate relationships among the members; to further the professional knowledge, competence, and performance of the members; to promote a better understanding of services rendered by members; to promote the accounting profession; and to act in a representative capacity for the profession.

Our Values

These core values guide our work:

► Ethical

We place integrity, trustworthiness, and accountability at the center of all we do.

► Encouraging

We inspire each other and our members to embrace challenges and opportunities, to think creatively, and to strive for personal and professional excellence.

► Professional

We respect one another and our members, regardless of our differences.

► Purposeful

We understand the importance of the CPA profession and our passion lies in serving our members.



Focused on the Future

Working Together

One of the Nebraska Society of CPAs' strengths is the role it plays as a sounding board for thoughts, ideas, and opinions from CPAs across the state. Through the Society, ideas may be channeled to the membership and then heard, analyzed, and acted upon. Through the Society, CPAs explore the issues that affect the profession's day-to-day and long-range outlook. Membership in the Society signifies a CPA's commitment to the profession and the belief that much can be accomplished by working together.

Our Goals

▶ Education Goal

To educate our members by offering quality, cost-effective Continuing Professional Education (CPE) through a variety of delivery formats.

▶ Legislative Goal

To advocate for a legislative and regulatory environment that supports our member CPAs.

▶ Communications Goal

To enhance and highlight the value of Society membership and promote the image of the CPA profession in Nebraska.

▶ Membership Goal

To maintain, serve, and support an active and involved membership to ensure the future success of the profession and the Society.

▶ Operations Goal

To develop and maintain effective and efficient Society operations for the benefit of our membership.



Volunteer CPAs Serve as Driving Force

The official decision-making body of the Nebraska Society of CPAs is the board of directors, which meets four times a year. The board approves the budget, sets member dues, and makes other policy decisions.

In 1928, members could serve on three committees: the Committee on Legislation & Education, the Committee on Finance, and the Committee on Ethics. Today, the Nebraska Society has 11 committees and occasional ad hoc committees and task forces established to accomplish specific goals.

Participation on boards and committees is viewed as an opportunity for CPAs to further develop leadership skills and gain a broader perspective of the profession. In addition, these volunteers are provided an opportunity to influence a profession that touches the lives of most Nebraskans. Committees meet two to three times per year.

If you would like to help maximize the power and performance of CPAs in Nebraska, we encourage you to serve on one of the following Society committees. Committee descriptions and current committee members are listed in the following section of this booklet.

- ▶ Accounting Careers Committee
- ▶ Business & Industry Committee
- ▶ Continuing Professional Education (CPE) Committee
- ▶ Ethics Committee
- ▶ Fall Conference Committee
- ▶ Governmental Accounting & Auditing Committee
- ▶ Legislation Committee
- ▶ Not-For-Profit Committee
- ▶ Political Education Committee
- ▶ Taxation Committee
- ▶ Women in Accounting Committee



Legislative Representation & Government Relations Are a Priority

The continued increase in legislative proposals affecting the CPA profession requires representation in the legislative arena. The Society's presence at the State Capitol and its visibility on the national level are critical.

Lobbying For CPAs

When the Nebraska Legislature is in session, the Society's lobbying efforts ensure the views of Nebraska CPAs are known. The first lobbyist for the Society was hired in 1956. Today, the Society's lobbyists, Walt Radcliffe, Korby Gilbertson, and Justin Brady of Radcliffe, Gilbertson & Brady, scrutinize every legislative bill, keep track of amendments, and become involved with legislative action on all bills that have a specific impact on the CPA profession. In addition, the Society testifies at public hearings and pens letters of support and/or opposition as needed.

The Society has long played a proactive role for certified public accountants in Nebraska, sponsoring bills and defending the profession against legislation that might be detrimental from the Society's standpoint. Nebraska was the first state to pass mandatory CPE legislation. In 1991, Nebraska became the 14th state to pass the 150-hour education requirement for new CPAs, and in 1994, the Society helped draft and support a successful effort in the Nebraska Legislature to pass the first bill in the nation allowing for the partial ownership of CPA firms by non-CPAs. In 2009, the Society helped draft and support the quick passage of "CPA Mobility" legislation, which allows licensed CPAs from other states to practice public accountancy in Nebraska without the need to obtain licensure by reciprocity, register, or pay a fee to the Nebraska Board of Public Accountancy. In 2013, the Society helped draft and support passage of "Expanded CPA Experience" legislation. In 2019, the Society worked with the State Board to draft and support passage of legislation that allows Nebraska CPA firms to create Employee Stock Ownership Plans (ESOPs). Thanks to another joint legislative effort by the Society and State Board in 2024, Nebraska CPA candidates will be able to sit for the Uniform CPA Examination after completing 120 semester hours (or 180 quarter hours) of qualifying college credit and a bachelor's degree beginning Jan. 1, 2025. In addition, the Society successfully achieved an exemption from inclusion in Nebraska's occupational licensing legislation in 2024 and we continue to oppose efforts that would extend Nebraska's sales tax on professional services.

On the national scene, the Society monitors events in Washington, D.C., and speaks on behalf of Nebraska CPAs in dealing with the state's congressional delegation.

Key Contact Program

The Society involves CPAs at the grassroots level through its Key Contact Program; these individuals assist in communicating the Society's positions on legislative issues to their state senators and the Nebraska congressional delegation when needed. The Society also works with the American Institute of Certified Public Accountants (AICPA) to strengthen the profession's voice both in Lincoln and in Washington.

In addition, the Society works closely with state and federal governmental agencies, including the Nebraska Department of Revenue and the Internal Revenue Service, which have operations that directly affect Nebraska CPAs. The Society also maintains contact with other statewide trade associations on issues of common interest.



Supporting the Political Process

Financing Campaigns

Through the Society's Political Education Committee (PEC), established in 1982, Nebraska CPAs may make political contributions to help finance the campaigns of candidates seeking elective office at the state level. The Society's political action efforts represent a key element in the Society's overall government relations program. Our system of government depends on the willingness of individuals to seek elected positions without fear of personal financial sacrifice. The Society's PEC provides CPAs with an opportunity to support candidates who understand the needs and concerns of CPAs and to hold candidates accountable for their actions as legislators.



Educating Nebraska's CPAs

Your Continuing Professional Education Partner

In 1971, the Society offered only two or three educational programs each year. Today, the Society offers approximately 9,500 courses, conferences, and webcasts year-round.

Attending in-person courses and conferences provides members with the opportunity to network and share best practices. Society members pay lower, discounted fees to attend Society-sponsored courses and conferences and are eligible for early bird pricing.

The Society provides CPAs at all levels of their careers with live continuing professional education programs, educating more than 2,000 CPAs each year. These programs are recommended for their timeliness, affordability, convenience, and quality.

Society courses are planned by CPAs for CPAs to keep members abreast of new developments and technologies affecting the profession. Programs are directed toward all areas of the profession and are designed to provide sound, practical instruction.

Nebraska CPAs serving on the Society's committees work closely with Society staff in developing topics and determining speakers for all conferences and courses. Each year, approximately 130 CPA volunteers are selected to serve on the various Society committees and boards.



Sharing Ideas

In addition to conferences and live CPE programs, the Society holds and participates in many other meetings and gatherings that give CPAs the opportunity to come together to network, discuss common interests, and share information.

State Senators' Reception & Dinner

The Society sponsors an annual State Senators' Reception & Dinner in January on the evening before the first day of every legislative session to bring CPAs together with their state representatives. This tradition began in the mid-1970s and continues to be an excellent event, with the majority of Nebraska's 49 state senators typically in attendance.

Annual Meeting

The Society's Annual Meeting, held each year during the Fall Conference, marks the changing of the guard for the Society's officers. During the Annual Meeting, the Society also welcomes and congratulates new CPA certificate holders and scholarship recipients, honors outstanding members with awards, and reflects on recent accomplishments of the Society.

During 2023, the Society celebrated its 95th anniversary during its Annual Meeting. Today, with more than 2,600 members, the Society can reflect on a history of growth and accomplishments with pride and look forward to a future in which the Nebraska Society will find new and innovative ways to serve its membership and the CPA profession.

Spring Meeting In Washington, D.C.

Every other year, the Society travels to Washington, D.C., for the AICPA's Spring Meeting of Council and AICPA Annual Members' Meeting. This trip is designed to bring CPAs up to date on current issues at the federal level and includes nationally known speakers and meetings with Nebraska's congressional delegation.



Scholarships Grow the CPA Pipeline

Nebraska CPAs understand the importance of a well-educated, well-trained workforce in our state. They also understand that accounting students are the future of the CPA profession. For these reasons, the Society is helping to grow the CPA pipeline by providing scholarships to accounting students attending college in Nebraska through the Foundation of the Nebraska Society of CPAs.

Each year, thousands of dollars in scholarships are awarded to deserving students. Foundation scholarships are funded through a portion of member dues, investments, and generous donations from members, CPA firms and businesses, and instructors.

Vision

The vision of the Nebraska Society of CPAs' Foundation is to empower a new era of CPAs who are not only skilled but also innovative and forward-thinking, ready to lead and shape the future of the accounting profession in Nebraska.

Mission

The mission of the Foundation is to elevate the CPA profession in Nebraska by awarding scholarships, enhancing accounting education, and supporting initiatives designed to cultivate and attract new individuals to the CPA profession.

Record Numbers

Established in 1976, the Foundation provided 74 scholarships worth \$95,500 to college accounting students at 14 Nebraska colleges and universities during the 2023-2024 school year.

The first president of the Foundation Board of Trustees was J.B. Dresselhaus of Lincoln. The Foundation continues to experience consistent growth under the leadership of current Foundation President Mark Manning of Crete.

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Society Awards

Each year, the Society accepts the nomination of members for the following four special awards:

- ▶ Public Service Award
- ▶ Distinguished Service to the Profession Award
- ▶ Outstanding Accounting Educator Award
- ▶ Outstanding CPA in Business & Industry Award

These awards were created to honor and show the Society's appreciation of those members who have given unselfishly to their communities, to their businesses, and to the accounting profession or to academia. Selection of the award recipients is determined by a special Awards Selection Committee that consists of the Society's current chairman, immediate past chairman, and three members appointed by the chairman, with final approval made by the Society Board of Directors.

Nominations should be received by October 31.

The awards are presented in the following year at the Society's Annual Meeting. It is at the discretion of the Awards Selection Committee and the Society Board as to which, if any, awards will be presented each year. Nominations not selected will remain in an active file for at least three years.

Every day, Nebraska CPAs are performing many unheralded services for their community, for their profession, and for Nebraska.

Consider some of the outstanding Society members you know and make a nomination today at nescpa.org/about/awards.



Promoting the Profession

Social Networking

The Society participates in the world of social media to help build online connections with our members and the general public.

Social media allows the Society to reach people we wouldn't otherwise reach, to promote the CPA profession and the positive role CPAs play in our state and communities, and to magnify the voice of the CPA profession.

- ▶ **Facebook:** <https://www.facebook.com/NebraskaCPAs>
- ▶ **X:** <https://twitter.com/NebraskaCPAs>
- ▶ **LinkedIn:** <https://www.linkedin.com/company/nebraska-society-of-cpas>

Responding To The Media

The Society is at times called upon by the media to respond to accounting and business issues. Interviews by Society officers help ensure the profession is represented and contribute to a better understanding of accounting and business issues. These interviews give the Society an opportunity to enhance the image of CPAs by stressing the roles they play within their communities and the state.

College Career Fairs

The Society addresses long-term workforce needs by promoting CPA participation in Career Fairs at public and private colleges throughout Nebraska. These events help match CPA firms and Nebraska businesses with potential employees and interns.



Member Discounts & Special Pricing

Through the Nebraska Society of CPAs' Member Benefits Program, the Society works to identify and align member needs and priorities with trusted organizations, known as Business Solution Providers, that are service-oriented and have a proven track record of success.

- ▶ Obtain affordable life insurance through the **AICPA**.
- ▶ Access a portfolio of personal and professional insurance products, including Accountants Professional Liability Insurance, Cyber Liability Insurance, Long-Term Care Insurance, Medicare Plans, and Pet Insurance through **AMBA**.
- ▶ Journey into a new domain with a new **.CPA** web address.
- ▶ Recruit top-notch employees at the Society's online **Careers Center** at nescpa.org/careers or through classified advertising in the Nebraska CPA journal.
- ▶ Manage payments in your firm with **CPACharge**, a professional online payment solution developed specifically for CPA firms.
- ▶ Enjoy perks and savings on the latest **Dell** products and select electronics and accessories.
- ▶ Meet your business' online transaction needs with **Elavon**, one of the largest merchant services providers in the United States.
- ▶ Help solve the accounting talent shortage, without outsourcing or offshoring, through **Miles Education**. Miles has hundreds of CPA candidates averaging four-plus years of experience in accounting, auditing, and tax.
- ▶ Take advantage of special shipping rates and print marketing materials with **UPS**.
- ▶ And more to come!

Visit nescpa.org/about/benefits for a complete list of Society programs.

Great Value For Your Dues Dollars

In addition, dues for members of the Nebraska Society of CPAs are among the lowest in the nation compared to other state societies. Membership dues are billed annually in April.

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Society Leadership Board of Directors

The Nebraska Society of CPAs Board of Directors is the official decision-making body of the Society and meets four times a year. The board approves the budget, sets member dues, and makes other policy decisions.

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1943 - Phil Johnson	1973 - Herman D. Weist	2003 - G. Randall Hansen
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1945 - Donald W. Lambie	1975 - Duane L. Thelen	2005 - David E. Lechner
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1957 - E. Ross Martin	1987 - James F. Rouch	2017 - Ryan L. Parker
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1959 - J.B. Dresselhaus	1989 - William V. Strain	2019 - Shari A. Munro
1960 - Donald S. Erion	1990 - David A. Emry	2020 - Ryan L. Burger
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1965 - Dean L. Busching	1995 - William L. Gaines, Jr.	

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The Accounting Careers Committee introduces Nebraska high school and college students to the diverse, expanding opportunities in the accounting profession.

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Business & Industry Committee

The Business & Industry Committee plans the Business & Industry Conference held in late April, works to stimulate interest and participation in the Society by industry members, and fosters interaction between members through educational and networking events.

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CPE Committee

The Continuing Professional Education (CPE) Committee helps plan the Society's annual courses, enabling Society members to enhance their skills and better serve their clients.

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Ethics Committee

The Ethics Committee investigates and disposes of ethics complaints within the Joint Ethics Enforcement Program (JEEP), monitors developments in the area of professional ethics, and informs the Society membership of official changes in the AICPA Code of Ethics and Nebraska Rules of Professional Conduct.

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Fall Conference Committee

The Fall Conference Committee plans and promotes the annual Fall Conference held in late October and participates in the administration of that event, which is associated with the Society's Annual Meeting.

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Governmental Accounting & Auditing Committee

The Governmental Accounting & Auditing Committee plans the annual Nebraska Governmental Accounting & Auditing Conference held in June and promotes improvements in providing professional services and excellence in financial reporting for governmental entities in Nebraska.

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Legislation Committee

The Legislation Committee coordinates Society lobbying activities in connection with proposed state or federal legislation related to the profession and evaluates such legislation for recommendations of action to be taken by the Society.

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Not-For-Profit Committee

The Not-For-Profit Committee plans the annual Not-For-Profit Conference held in June, identifies and promotes educational opportunities for not-for-profit organizations and the practitioners who serve them, and disseminates information regarding changes in accounting, auditing, reporting, and tax issues.

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Political Education Committee Board of Trustees

The Board of Trustees for the Political Education Committee (PEC) works to protect, advance, and strengthen the CPA profession and the free enterprise system by collecting and distributing financial contributions to state legislative candidates for the Nebraska Unicameral to further those objectives.

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Taxation Committee

The Taxation Committee assists, informs, and advises Society members and government authorities on federal, state, and local tax matters and enhances public awareness of the CPA's role in the field of taxation. The Taxation Committee also assists the Legislation Committee in monitoring, evaluating, and testifying on proposed federal and state tax legislation.

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Women in Accounting Committee

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Foundation Board of Trustees

Accounting students are the future of the CPA profession. Nebraska CPAs understand this and are working hard to further develop the accounting workforce of the future. The Foundation Board of Trustees supports excellence in the CPA profession and helps grow the CPA pipeline by overseeing the Foundation of the Nebraska Society of CPAs. Each year, the Foundation provides thousands of dollars in financial assistance to more than 70 accounting students at 14 colleges and universities throughout Nebraska. Foundation scholarships are funded through a portion of member dues, investments, and generous donations from members, businesses, and instructors.

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1986 - Corwin D. Moore	2001 - James F. Rouch	2015 - Donald D. Kluthe
1987 - Donald L. Darst	2002 - Richard A. Hoiekvam	2016 - Leo J. Panzer
1988 - Larry R. Larson	2003 - James R. Greisch	2017 - Richard G. Zacharia
1990 - Verne R. Moseman	2004 - Janice M. Mumm	2018 - Donavon A. Heimes
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1994 - Harold E. Hoff	2007 - Robert K. Muehling	2021 - Janet M. Labenz
1995 - Thomas D. Hubbard	2008 - Lyndee J. Black	2022 - Lawrence R. Kopsa
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1997 - William V. Strain	2010 - Robert C. McChesney	

About The Distinguished Service To The Profession Award

The purpose of the Distinguished Service to the Profession Award is to recognize Nebraska CPAs who have during their career demonstrated a commitment to the accounting profession locally, nationally, or internationally. The nominee must be a CPA, be a member of the Nebraska Society, and be in good standing with the profession.

The selection committee will consider accomplishments in the following areas:

- ▶ Service to the Nebraska Society, such as serving as a board or committee member, legislative key person, or CPE discussion leader;
- ▶ Service to the American Institute of Certified Public Accountants, such as serving as a member of council, committee member, or speaker;
- ▶ Service to the Nebraska Board of Public Accountancy, such as serving as a board member or task force member; or
- ▶ Service to other organizations that contribute to the overall strength of the accounting profession.

OUTSTANDING CPA IN BUSINESS & INDUSTRY AWARD

1997 - John T. Connor	2011 - Thomas J. Von Riesen
1998 - John A. Sturgeon	2012 - Bradley R. Crain
1999 - Bruce C. Rohde	2013 - David E. Lechner
2000 - JoAnn M. Martin	2014 - Jeffrey M. Scherer
2001 - George J. Kubat	2015 - Michael A. Summers
2002 - Sheri L. Andrews	2016 - Aaron C. Hilkemann
2003 - Irving R. Dana, III	2017 - Doris J. Robertson
2005 - William F. Goedken	2018 - Chris C. Roth
2006 - James R. Krieger	2019 - Ryan L. Parker
2007 - Karen B. Rhoads	2020 - Susan K. Wilkinson
2008 - Tonn M. Ostergard	2021 - Deann M. Haeffner
2009 - Steven L. Ford	2022 - Douglas A. Ewald
2010 - Lewis E. Trowbridge	2023 - Neal D. Lyons

About The Outstanding CPA In Business & Industry Award

The purpose of the Outstanding CPA in Business & Industry Award is to honor Nebraska CPAs who have made a significant contribution to the growth and success of their employers or a notable entrepreneurial achievement. In addition, the award recognizes those CPAs working in business, industry, or government who have distinguished themselves by having made a significant contribution to the enhancement of the accounting profession. The nominee must be a CPA employed in business, industry, or government, and a current or former member of the Nebraska Society of CPAs.

The Selection Committee will consider the nominee's involvement in the following areas:

- ▶ Significant contributions to the growth and success of his or her employer;
- ▶ Notable entrepreneurial achievement; or
- ▶ Service to organizations at the local, state, and national level that contribute to the overall strength of the accounting profession.

PUBLIC SERVICE AWARD

1980 - Marvin E. Jewell	2005 - Thomas J. Purcell, III
1981 - Corwin D. Moore	2006 - Byron L. Boslau
1982 - Irving J. Olson	2007 - John W. Hancock
1983 - Verne R. Moseman	2008 - Lloyd E. Brooks
1986 - Fred A. Lockwood	2009 - Richard J. Vierk
1987 - J.B. Dresselhaus	2010 - Edward W. Fitzgerald
1989 - George W. Klein	2011 - Duane J. Gabriel
1990 - George J. Kubat	2012 - Jared M. Faltys
1992 - John R. Uhrich	2013 - JoAnn M. Martin
1994 - Lawrence F. Chandler	2014 - Galen D. Hadley
1995 - Lewis E. Trowbridge	2015 - Kristian H. Rutford
1996 - Frank L. Hayes	2016 - Bryan E. Slone
1997 - Thomas M. Price	2017 - James R. Gardner
1998 - Elaine E. Booth	2018 - Daniel F. Koraleski
1999 - Paul L. Dutton	2019 - Sarah C. Krick
2000 - David L. Duren	2020 - Ralph Dovali, Jr.
2001 - David R. Oelkers	2021 - Jennifer R. Claus
2002 - B.T. Friedrichsen	2022 - Robert H. Berger
2003 - Delmar Lienemann, Sr.	2023 - John P. Stinner
2004 - Rod Heng	

About The Public Service Award

The purpose of the Public Service Award is to recognize Nebraska CPAs who have performed outstanding public service in their communities. The nominee must be a CPA, be a member of the Nebraska Society of CPAs, and be in good standing with the profession.

Examples of public service may include:

- ▶ Participation in community, charitable, or other civic activities on an ongoing basis;
- ▶ Participation in and responsibility for a public service project that had a significant impact on the community;
- ▶ Service in a notable volunteer capacity in government at the local, state, or national level; or
- ▶ Other volunteer service to individuals or organizations.

OUTSTANDING ACCOUNTING EDUCATOR AWARD

1982 - Thomas D. Hubbard

1983 - Jack Krogstad

1984 - Richard Metcalf

1986 - Robert H. Raymond

1987 - George C. Holdren

1988 - Thomas D. Hubbard

1994 - Judith Watanabe

1995 - Thomas J. Purcell, III

1996 - Roger W. Doerr

1997 - Tom D. Lewis

1999 - Kathleen J. Smith

2000 - Paul A. Shoemaker

2001 - Vaughn L. Benson

2002 - Michael E. Shadbolt

2003 - Nancy J. Stara

2005 - Debra M. Cosgrove

2006 - Laurie S. Swinney

2007 - Janice E. Lawrence

2009 - Sharon K. Garvin

2012 - Jack R. Kramer

2013 - Thomas A. Shimerda

2015 - Stanley R. Obermueller

2017 - Jon D. Moxnes

2019 - Jillian K. Poyzer

2020 - Courtney C. Baillie

2021 - Margaret E. Knight

2022 - Kathryn C. Maresh

2023 - Susan W. Eldridge

About The Outstanding Accounting Educator Award

The purpose of the Outstanding Accounting Educator Award is to recognize full-time Nebraska accounting educators for excellence in accounting education. The nominee must be a CPA, be a member of the Nebraska Society, be a full-time accounting educator at a college or university, and be in good standing with the profession.

The selection committee will consider the nominee's accomplishments in the following areas:

- ▶ Excellence in classroom teaching, including endorsements from students, alumni, and/or colleagues;
- ▶ Contributions to accounting education, including professional involvement, educational innovations, and publications;
- ▶ Service to the Nebraska Society, such as serving as an officer, board or committee member, legislative key person, or CPE discussion leader; or
- ▶ Service to other organizations that contribute to the overall strength of the accounting profession.



**2025
AWARDS
NOMINATION
FORM!**

Application for Award Nomination

To nominate a Nebraska Society of CPAs member:

Download the Printable Form



<https://tinyurl.com/CPAaward>

Deadline For Nominations

NOVEMBER 8, 2024

Email: society@nescpa.org

Mail: Nebraska Society of CPAs, 7435 O Street, Suite 100, Lincoln, NE 68510



NEBRASKA SOCIETY OF
Certified Public Accountants

Nebraska Society of CPAs Staff Directory

Dedicated Staff

The Society's four-person staff is committed to delivering the utmost value for your membership, while helping you take advantage of all the opportunities the CPA profession provides. Please let us know how we can best serve you!

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Nebraska Society of CPAs





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