CPE PLUS: Start from Trust: Adopting AI and New Technology in Small and Midsize CPA Firms

Wednesday, October 21 2026 12:00pm - 1:00pm EDT Virtual 1.00 Credits

Professional skepticism is the profession's best asset for the AI decade, if it is aimed at the right target. Drawing on the Start from Trust research report and the psychology of trust and judgment, this session examines why experienced professionals discount sound AI output, what mis-aimed caution quietly costs, and how to match trust to what a tool actually does well. You will locate your firm on the AI Trust and Usage Quadrant, get five trust questions to ask any AI vendor, and leave with evidence-based first steps sized to your firm. The session is vendor neutral and recommends no products.

CPE PLUS: From Audit to Indictment: When Civil Tax Matters Turn Criminal

Tuesday, October 27 2026 12:00pm - 1:00pm EDT Virtual 1.00 Credits

This one-hour CLE webinar aims to provide CPAs with practical guidance on recognizing when a civil tax matter is at risk of becoming a criminal matter and what to do when the warning signs appear. Drawing on experience from tax attorneys, one of whom is a former federal prosecutor, presenters will cover the “badges of fraud” that IRS examiners and Special Agents look for, the mechanics of the civil-to-criminal referral process (including the role of IRS Criminal Investigation and the fraud technical advisor), common fact patterns in civil examinations that get referred for criminal prosecution, and the taxpayer rights and procedural protections that attach once criminal exposure emerges.

CPE PLUS: Understanding Advantages of SBA Financing With Program Updates

Tuesday, November 10 2026 12:00pm - 1:00pm EST Virtual 1.00 Credits

There have been many changes in SBA lending in the past years and we are expecting more this year. This presentation will be an overview of SBA financing rules with any updates and a chance to ask questions. Financing through the SBA, small business administration, allows a smaller or in some instances no down payment, a longer term, a collateral shortfall and is the difference between getting the loan and not getting the loan. The SBA 7(a) program is frequently used for business acquisition financing, partner buyouts or partial buyouts and the SBA 504 loan program is frequently used for acquisition of fixed assets, majority owner-occupied commercial real estate or equipment with a life of 10 years or longer.

CPE PLUS: Beyond the Tipping Point: Insights from the 2026 AI Tax Research

Tuesday, November 24 2026 12:00pm - 1:00pm EST Virtual 1.00 Credits

Drawing on fresh data from Blue J and CPA.com's 2026 AI Tax Research Solution Outlook Report, this session explores how accounting firms are shifting from trying AI to relying on it—and what this means for the future of the profession. From deepening client relationships to placing a greater emphasis on practitioner judgment, AI adopters are increasingly prioritizing human experiences and the uniquely human skills AI can't replace. Hear from Ankit Dhawan, Partnerships Manager at Blue J, on what these changes mean for your firm and gain practical strategies to make the most of your own AI transformation.

CPE PLUS: The 2026 Real Estate Tax Playbook: The Must-Do Strategies for CPAs

Wednesday, December 9 2026 12:00pm - 1:00pm EST Virtual 1.00 Credits

This focused year-end session provides CPAs with a checklist covering the most impactful tax-saving strategies for real estate clients in 2026. Topics include cost segregation timing, depreciation elections, partial asset dispositions, coordinated incentive planning, §163(j) considerations, and audit-ready documentation strategies.

CPE PLUS: When Private Equity Comes Calling: The New Frontier in Professional Services M&A

Wednesday, April 21 2027 12:00pm - 1:00pm EDT Virtual 1.00 Credits

For decades, the legal profession assumed it was insulated from private equity's reach - unauthorized practice of law rules, ownership restrictions, and ethical constraints seemed to make lawyers, accountants, and physicians poor candidates for the roll-up playbook that transformed dental, veterinary, and physical therapy practices. That assumption is being tested. PE sponsors have identified professional services organizations as attractive targets: recurring revenue, fragmented markets ripe for consolidation, and increasingly workflows where AI-driven automation promises to compress costs and multiply margins in ways that make even highly regulated, labor-intensive practices financially compelling. But these aren't standard buyouts. Structuring an acquisition of a law, accounting, or medical practice requires navigating a patchwork of state-specific restrictions on non-lawyer ownership, fee-splitting prohibitions, and licensure requirements often through management services organization (MSO) structures or friendly-PC arrangements designed to separate clinical/professional judgment from the capital and control PE investors expect. Jurisdictions like Massachusetts add another layer of complexity: the state's near-total unenforceability of non-competition agreements for physicians (and significant limits for other professionals) undermines a tool PE buyers typically rely on to protect the value they're paying for, forcing dealmakers toward alternative retention and restrictive covenant strategies.

CPE PLUS Bundle

Multiple Events Between Monday, September 28 2026 - Monday, September 28 2026 Eligible for 0.00 Credits

Free CPE credits available only to NECPAs members. Check back for more information to come!