About the CPE Forum

The CPE Forum was established in the Fall of 1980 by Josephine (Jo) Sarnelli, CPA (www.SarnelliCPA.com). The Forum's mission is to provide high quality educational programs at a low cost to business professionals, including Certified Public Accountants and others seeking continuing professional educational (CPE) credits for licensing purposes. It is also open to the general community.

General Information

Each session qualifies for 3 hours of Continuing Professional Education credits, except for the November 28th session which qualifies for 4 credits. The sessions meet on Tuesdays from 3:00 until 6:00, except for November 28th which begins at 2:00 to offer 4 hours of CPE . The cost of attending all or any part of the six-week series is $100.00.

Write check payable: CPE Forum

Mail check: Josephine Sarnelli, CPA
14 Mill Street
Westfield, MA 01085

Online Learning

All sessions are conducted online with live streaming and interactive participation using the Zoom webinar application. You can join a session using a smart cellphone, tablet, computer, or laptop. If your computer does not have a microphone or speaker, you can use either your landline or cellphone in conjunction with your computer. A video camera is not required.

Register in advance for these webinars:

https://us02web.zoom.us/webinar/register/WN_gOq6fB8oTOWf_S5XnhlMwQ

After registering, you will receive a confirmation email with information about joining the webinars.

RETAIN THAT CONFIRMATION EMAIL. IT WILL HAVE THE SECURITY LINK TO ATTEND THE ENTIRE SERIES.

For more information and assistance on registering, visit www.cpeForum.org.

The Spring CPE Forum is sponsored in part by:

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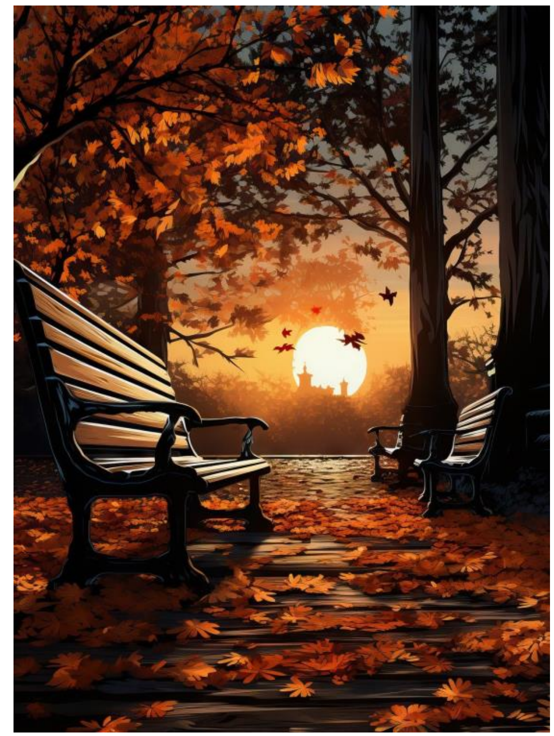
CPE Forum

Fall 2023
Online Educational Programs



Contact:
Josephine Sarnelli, CPA
(413) 746-9067
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www.cpeForum.org

November 7, 2023

Financing Eldercare

Enrique J. Alvarez, MSFS, CLU, ChFC, RHU, REBC, CFP®, CASL, MRFC
Retirement Doctor®, LLC
eja@retirementdoctor.com

Kevin D. Quinn, J.D., President
Legacy Counsellors, P.C.
kquinn@legacycounsellors.com

Many people may require some form of eldercare. Discussion will include these financing strategies: Self-funding, Long Term Care, Annuity with a LT Care Rider, Medicaid Qualified Annuity, Life Insurance with a LT Care Rider, Life Insurance with a Chronic Care Rider, Under-insured Motorist Coverage and Medicaid. Additionally, asset protection strategies will be discussed for protecting the family home and assets with trusts.

November 14, 2023

Helping Businesses Manage Human Resources

Jennifer Rodgers, HR Small Business Consultant at Paychex
Jrodgers1@paychex.com

Human Resource management is a critical function that can be challenging to manage. As the business landscape continues to change demands on HR professionals and business owners are growing. During this session, Jennifer will discuss best practices for attracting, hiring and retaining employees, promoting employee wellbeing, the value of offering benefits, and staying connected and compliant with ever changing state and federal laws.

November 21, 2023

A.I. Made Easy: Your Gateway to Immediate, User-Friendly Business Results

Delcie Bean, Founder & CEO of Paragus Strategic I.T.
www.paragusit.com

Everybody's talking about A.I., but how does it work? And more specifically, how can it work for your business? Does it really save that much time and money? What kind of changes will you have to make to your current systems? Is it easy to use? There are no stupid questions. Join Paragus Strategic I.T. Founder & CEO, Delcie Bean, for an informative session designed to demystify this new technology and help you better understand the simplicity and effectiveness of integrating A.I. into your daily operations.

November 28, 2023

Annual Tax Update (4 Hours)

Deborah Rogers, CPA
Deb Rogers, CPA deb@rg-cpa.net

Deb is an active member of the Mass Society of CPAs Tax Committee. She will present on current tax updates. She will lead a high-level discussion and presentation on current tax law developments at both the Federal and State level. The program will begin at 2:00 and end at 6:00 to qualify for 4 hours of CPE credits.

December 5, 2023

Guidance for Your Life

Jarrod M. Liebel CFP®, ChFC®, CLU®, M.S.
FVP, Manager | PeoplesWealth Advisory Group
jarrod@mypeopleswealth.com

Jarrod will present on the core foundational elements needed to construct a sound holistic financial plan designed to help families and business owners achieve security in their lifetimes and the lifetimes of their heirs.

December 19, 2023

Annual Fraud Update

Josephine Sarnelli, CPA
Sarnelli@SarnelliCPA.com

The business world is ever changing and so is fraud. That requires that fraud prevention techniques always be evolving. This will be a lively discussion with other professionals in the crime prevention field.