



# A different school of thought

Executive Education

[www.kpmglearning.com](http://www.kpmglearning.com)

# Our story

Welcome to KPMG Executive Education. A different school of thought, designed to meet a world of different needs.

While emerging and complex accounting and regulatory changes are driving the need for enhanced skills, the world and business are also moving at a speed we never thought possible. And if companies and people don't keep up, it will become almost impossible to catch up.

Through KPMG Executive Education, you can tap into all the training you need. We've developed and delivered over 1,000 programs on trending topics and emerging issues in the accounting and finance industries, taught by KPMG leaders, industry specialists, and highly regarded academics from prestigious universities. Our 30+ years of experience has helped numerous Fortune 100, middle-market, and global companies strengthen their staff and secure their future.

To create curriculum, our Learning & Development (L&D) professionals work closely with our KPMG audit, accounting, and industry specialists, as well as our thought leaders. To help ensure excellence and accuracy, KPMG Department of Professional Practice is involved in the development and review process. Additionally, we know people learn differently today, and we infuse innovation to drive relevance and interest.

We offer flexible, multi-channel delivery—in-person, online, on-site, and mobile—to fit your company's culture, as well as professionals' preferences and demanding schedules. Our real-time, engaging, actionable curriculum can bring benefits to your business and your people.

## Blush-worthy kudos

We're proud of these honors we've achieved:

- **Training Magazine** – Top 10 Hall of Fame, 2011—present
- **CLO Magazine** – LearningElite Gold, 2013-2020
- **ATD** – Excellence in Practice Awards, 2016

We look forward to helping you, your employees, and your company look ahead and thrive.



**Stacey L. Tolpa**  
*Managing Director, Executive Education*

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**Refreshed:** Courses that are considered Refreshed have had significant content updates. You may be eligible to receive CPE credit if you have previously taken this course.

📅 In-person Seminar  
🔄 Live Virtual Seminar

# A deeper dive into the details of KPMG Executive Education



## For You

**Public Seminars**, offered in both in-person and live virtual formats, cover the most relevant and trending topics to help you avert skill gaps and thrive. Our instructor-led courses are taught by KPMG leaders, industry specialists, and highly regarded academics from prestigious universities.

**Digital Self-Studies** are mobile-friendly courses – nearly all CPE-eligible – on current and emerging technical accounting topics that build skills and confidence in the ever-evolving accounting industry. Annual subscriptions for individuals are available.

**Free Webcasts** (sponsored by KPMG Institutes) are nearly all CPE-eligible and cover emerging trends, risks, and opportunities. Our open forum invites insight sharing and access to timely thought leadership.



## For Your Team

**Private Seminars**, offered in both in-person and live virtual formats, save on tuition, travel, and time. Our seminars, taught at your office, focus on the issues and topics that matter most to your industry and company. Exercises and examples are focused on your needs, so they're highly productive and engaging.

**Custom Learning Solutions** are created for your business's unique needs, strategy, goals, and culture. We use engaging teaching methods – including simulation, gamification, and curated content – to encourage participation and interaction. Relevance plus engagement plus actionable coursework drive people to thrive.

**Custom Learning Portals** are your gateway to knowledge. We offer an extensive list of technical accounting and finance courses, all mobile-friendly and nearly all CPE-eligible. New trainings are added on a regular basis. Management can assign training and receive monthly reports of team members' course progress.





## Update Conferences

### Course objective:

The annual symposium updates corporate financial executives on the important financial and management issues that impact their areas of responsibility over the near term and for year-end reporting.

**Prerequisite:** Basic knowledge of U.S. GAAP

**Preparation:** None

**Level of knowledge:** Update

**Estimated CPE credits:** 16 hrs

**Field of study:** Accounting

**Delivery method:** In-person

**Date:** December 4–5, 2024

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

New

# 34<sup>th</sup> Annual Accounting & Financial Reporting Symposium

**This year's Symposium will be held at Caesars Palace in Las Vegas.**

This popular and highly rated event offers sessions on a wide range of topics geared to finance and accounting executives.

Our 2023 Symposium sold out early so act now to secure your spot for 2024. We invite you to register now for the 2024 event and plan to join your peers, KPMG professionals and thought-provoking keynote speakers for sessions on top-of-mind business issues including:

- recent FASB and SEC developments
- audit committee issues
- U.S. legislative and federal tax updates
- the economy
- the most relevant technical accounting topics
- emerging technologies

By the end of this course, participants should be able to:

- discuss important financial management topics, issue and trends over the near term and for year-end reporting
- recall current economic, tax and audit committee insights
- describe how to lead effectively in the current environment

Refreshed

# Annual U.S. GAAP Update – 2024

**Experienced preparers and users of financial statements need to stay on top of key revisions that affect U.S. Generally Accepted Accounting Principles (GAAP). This live virtual seminar brings participants up to date on recent developments.**

This course focuses on recent and expected changes in U.S. GAAP guidance, disclosures from the FASB and SEC, and hot topics such as trends in SEC comment letters. We will discuss application and transition rules related to recent pronouncements as they relate to public, private and not-for-profit entities. Also to be addressed are current trends in environmental, social and governance (ESG) reporting.

By the end of this course, participants should be able to:

- evaluate recent accounting standard updates to ensure compliance with accounting changes and relevant disclosures
- explain accounting adoptions for public, private and not-for profit companies in current areas
- discuss accounting and reporting issues resulting from recent economic trends and events
- recall the standards and disclosure requirements expected to be effective in the near future (and their impact)
- Describe key themes from the SEC and PCAOB related to non-GAAP disclosures, risk management, ESG and MD&A

This course is updated regularly to reflect new developments.

## Update Conferences

### Course objective:

Give participants an in-depth understanding of the recent and proposed guidance issued by the FASB, SEC, and other regulators, enabling them to assess the impact of this new guidance on their companies and/or clients.

**Prerequisite:** Basic knowledge of U.S. GAAP

**Preparation:** None

**Level of knowledge:** Update

**Estimated CPE credits:** 8 hrs

**Field of study:** Accounting

**Delivery method:**  
Live Virtual

**Course leader:**  
Brian Ballou, PhD, CPA  
Professor and MBA Faculty  
Director, Miami University.

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

### Course objective:

Give participants an in-depth understanding on how and when to recognize revenue under ASC 606 and IFRS 15 and enable them to apply this guidance and comply with the reporting requirements to typical transactions entered into by their companies.

**Prerequisite:** Basic knowledge of U.S. GAAP

**Preparation:** None

**Level of knowledge:**  
Intermediate

**Estimated CPE credits:** 8 hrs

**Field of study:** Accounting

**Delivery method:** In-person

**Course leaders:** To be determined

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

New

# Revenue Recognition Fundamentals

### Special Discounts:

**In conjunction with your registration, you will automatically be enrolled into *Revenue from Contracts with Customers – Overview*. The completion of this complimentary, CPE-eligible self-study will allow for all participants to attend the course with equivalent advance knowledge.**

In addition, registrants of *Revenue Recognition Fundamentals* will receive a 50% discount on the remaining courses within the *Revenue from Contracts with Customers* web-based training series. Instructions for redeeming this offer will be provided in the registration confirmation email that you will receive upon registering for the course.

### Course Details:

Revenue recognition is one of the most pervasive accounting topics. Our course provides an overview of ASC Topic 606, *Revenue from Contracts with Customers*, focusing on the areas that can prove challenging to professionals, such as:

- The five-step model
- Determining performance obligations
- Point-in-time versus over-time revenue recognition
- Principal versus agent considerations
- Licensing arrangements
- Disclosure requirements



# Lease Accounting

**FASB ASC 842 has redefined accounting for leases. This seminar explains the requirements of the standard, its logic, implications, and problem areas concerning financial statement preparers.**

Practical hands-on spreadsheets illustrate the underlying concepts and their rationale, allowing participants to understand how the complexities of the new standard affect the interpretation of financial statements by investors.

## Agenda:

- Four ways to account for contractual commitments for assets that are depreciated
  - Commitments that stay off the balance sheet: Contracts that are not leases; Short-term leases
  - Commitments that are on a balance sheet: Operating and finance leases
- Lease payments, discount rate, inception date, commencement date, lease term
- Allocating consideration to lease and non-lease components
- Impairments of the right-of-use asset, modifications reassessments, subleases
- Sale-leaseback accounting, build-to-suit leases, real estate leases
- Policy elections and disclosures
- Lessor accounting
  - Interaction with revenue recognition rules
  - Elimination of the distinction between real estate leases and other leases
  - Elimination of leveraged leases

## Technical Accounting

### Course objective:

Help participants understand and apply the U.S. GAAP lease accounting standard (ASC 842) and explain its logic, its implications, and the problem areas for constituents.

Prerequisite: Basic knowledge of U.S. GAAP

**Preparation:** None

**Level of knowledge:** Intermediate

**Estimated CPE credits:** 16 hrs

**Field of study:** Accounting

**Delivery method:** In-person, Live Virtual

**Course leader:** Dan Gode, Co-founder, Almaris E-Learning Systems

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

### Course objective:

Provide participants with an in-depth understanding of how to apply the FASB pronouncements on accounting for income taxes, including the information needed to determine journal entries in specific situations and the appropriate financial statement disclosures.

**Prerequisite:** Basic knowledge of U.S. GAAP

**Preparation:** None

**Level of knowledge:** Intermediate

**Estimated CPE credits:** 16 hrs

**Field of study:** Accounting

**Delivery method:** In-person, Live Virtual

**Course leader:** Dan Gode,  
Co-founder, Almaris  
E-Learning Systems

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

# Accounting for Income Taxes

**Accounting for income taxes has long been a complicated, evolving challenge. We use easy-to-follow examples with detailed journal entries to help you understand and apply income tax accounting per FASB ASC 740.**

The first half of the course introduces the conceptual foundation of ASC 740. It explains how to reconcile permanent and temporary differences between four flows: cash flows, GAAP income, taxable income, and more-likely-than-not taxable income, given the uncertainty in income taxes. Also covered are tax loss carryforwards, tax credit carryforwards, other comprehensive income, and tax disclosures.

We then move to more advanced concepts, such as valuation allowances, unrecognized tax benefits, interim tax allocations, business combinations, and stock compensation. We go beyond the technical requirements and use easy-to-follow examples with detailed journal entries to explain the rationale and consequences of these standards.

Our *Advanced Accounting for Income Taxes* seminar builds upon this seminar and assumes that you have mastered the topics in this seminar. Please read the descriptions for both seminars to choose which one (or both) is best for you. Many participants take both seminars.

### Agenda:

- Permanent vs. taxable and deductible temporary differences between book flows and tax flows and how they affect the effective tax rate
- The difference between taxes payable (refundable), unrecognized tax benefit liabilities, and deferred tax liabilities (assets)
- Taxes and other comprehensive income
- Tax credit carry forwards and tax loss carry forwards
- Valuation allowance for deferred taxes
- Unrecognized tax benefit liabilities
- Interim period taxes for quarterly reporting
- Deferred taxes for business combinations and sharebased compensation

# Advanced Accounting for Income Taxes

**This advanced seminar explains complex aspects of FASB ASC 740. We go beyond merely describing the technical requirements; we explain these standards' rationale and consequences using clear examples with detailed journal entries.**

This seminar builds on our intermediate-level Accounting for Income Taxes seminar. Please read the descriptions for both seminars to determine which is best for you. Many participants take both. For example, the intermediate seminar only covers acquisitions with no tax-deductible goodwill, while this seminar covers tax-deductible goodwill, 338 elections, contingent consideration, transaction costs, and measurement period adjustments. A full list is provided below.

## Agenda:

- Unrecognized tax benefits: Accrual of interest, UTBs that result in adjustments to NOLs, interaction with state taxes
- Valuation allowance: Interaction with business combinations, share-based compensation, discrete items, and intraperiod tax allocation
- Intraperiod tax allocations: Discontinued operations; Other comprehensive income; treatment of dangling OCI items after changes in the tax rate; items that go directly to paid-in capital
- Interim allocations: Out-of-period adjustments due to the release of the valuation allowance, unusual or infrequently occurring items, the effect of rate changes
- Acquisitions with tax-deductible goodwill, Section 338 elections, contingent consideration, transaction costs, measurement period adjustments
- Foreign operations: Remeasurements, translations, repatriation
- Intra-entity transactions: Change in basis
- Equity investments, joint ventures, non-controlling interest
- Intercorporate tax allocations: Separate-return method versus benefit-for-loss method
- Share-based compensation: 162(m) issues, 83(b) elections, 409A issues, disqualifying dispositions, acquired share-based compensation

## Technical Accounting

### Course objective:

Provide participants in-depth exposure to complex issues related to accounting for income taxes for participants knowledgeable of the relevant FASB requirements.

**Prerequisite:** Basic knowledge of U.S. GAAP and knowledge of FASB requirements for accounting for income taxes

**Preparation:** Accounting for Income Taxes or equivalent

**Level of knowledge:**  
Advanced

**Estimated CPE credits:** 16 hrs

**Field of study:** Accounting

**Delivery method:** In-person,  
Live Virtual

**Course leader:** Dan Gode,  
Co-founder, Almaris E-Learning  
Systems

This course is co-presented by a KPMG partner with specialized knowledge in the subject matter.

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

## Technical Accounting

### Course objective:

Using lecture and exercises, this course is designed to give participants a detailed understanding of the more important differences between FASB and IASB pronouncements, and help determine the information needed to make the appropriate adjustments on the financial statements for those differences.

**Prerequisite:** Basic knowledge of U.S. GAAP

**Preparation:** None

**Level of knowledge:** Intermediate

**Estimated CPE credits:** 16 hrs

**Field of study:** Accounting

**Delivery method:** In-person, Live Virtual

**Course leaders:** Partners and senior managers from KPMG's Department of Professional Practice Group

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

# IFRS—Practical Application and Comparison to U.S. GAAP

**For companies subject to IFRS (International Financial Reporting Standards) and U.S. GAAP requirements, accounting can be doubly complex given critical differences between the two systems.**

Financial reporting professionals face a variety of challenges as they prepare statements in compliance with IFRS and even more when adopting IFRS. This live virtual seminar is designed for financial executives of U.S. subsidiaries of foreign companies, U.S. companies accessing foreign capital markets or with international investors, and any other company reporting under IFRS. The latest standard-setting activities by the International Accounting Standards Board are also covered.

By the end of this course, participants should be able to:

- recognize the key differences for U.S. companies adopting IFRS on topics such as:
  - Financial instruments
  - Revenue recognition
  - Intangible assets
  - Consolidation and joint ventures
  - Leasing
  - Income taxes
  - Presentation and disclosures
- recall climate-related risks and their impacts on the financial statements
- describe the practical considerations for converting from U.S. GAAP to IFRS.

# Fair Value Accounting: Guidance and Application

**Measuring fair value requires a consistent process and involves significant judgment and estimation. A number of external forces are causing complexities in the marketplace, including volatile financial markets, significant economic uncertainty resulting from geopolitical events, rising inflation and interest rates, increasing concern on how climate change affects fair value, and new technologies (including investments in cryptocurrency). These forces place pressure on companies to ensure that key inputs and assumptions are properly incorporated into fair value accounting.**

This live virtual seminar will reinforce core concepts covered in ASC Topic 820, Fair Value Measurement, as they apply to both financial and nonfinancial assets and liabilities. Using case studies to dive deeper, participants will evaluate and interpret examples to apply the concepts covered in ASC 820.

By the end of this course, participants should be able to:

- evaluate the process for identifying and measuring fair value for financial and nonfinancial assets and liabilities
- assess key assumptions in determining fair value (and whether those assumptions can ensure that models are reasonable and robust)
- determine inputs to measure fair value at appropriate level 1, level 2, and level 3 hierarchies
- select appropriate valuation approach(es), technique(s) and inputs to measure fair value
- review the associated risks and their impact on ensuring effective internal control.

## Technical Accounting

### Course objective:

Give participants an in-depth understanding of ASC Topic 820, Fair Value Measurement, highlighting the accounting and reporting requirements, key inputs and assumptions used in valuation techniques to estimate fair value, and highlight the common practice issues as identified by regulators in complying with the fair value requirements.

**Prerequisite:** None

**Preparation:** None

**Level of knowledge:** Basic

**Estimated CPE credits:** 8 hrs

**Field of Study:** Accounting

**Delivery method:** Live Virtual

**Course leader:** Brian Ballou, Professor and MBA Faculty Director, Miami University

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

### Course objective:

After attending this course, participants should be able to apply the ASC Topic 815 (as updated by ASU 2017-12) requirements to common derivatives and hedging transactions, including calculating journal entries and disclosures, and describing key business considerations related to the use of derivatives.

**Prerequisite:** Basic knowledge of U.S. GAAP

**Preparation:** None

**Level of knowledge:** Intermediate

**Estimated CPE credits:** 16 hrs

**Field of study:** Accounting

**Delivery Method:** In-person, Live Virtual

**Course leaders:** Partners and directors from KPMG's Advisory practice. Co-presented by an external facilitator with specialized knowledge in the subject matter.

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

# Derivatives & Hedging Foundations for Accountants

**This seminar introduces both the business and accounting sides of derivatives and hedging. Gain foundational knowledge and a practical understanding of this important topic.**

Led by leading derivatives and hedging professionals at KPMG, this course teaches accounting and treasury professionals how to designate hedge accounting relationships, assess hedge effectiveness, prepare journal entries and draft disclosures.

We begin with an overview of derivative products – futures, forwards, options and swaps – including how they work and the associated accounting treatments. Next, we focus on broad derivative market categories including interest rates, commodities and currencies. Then, we use case studies to understand hedge accounting models and discuss current events impacting derivatives and hedging, such as LIBOR transition.

By the end of this course, participants should be able to:

- describe a derivative and an embedded derivative, and how companies use them
- distinguish certain types of hedging, such as fair value, cash flow, foreign currency, commodity and interest rate
- explain recent developments impacting derivatives and hedging
- cite applicable disclosures for derivatives and hedging.



# Accounting for Business Combinations

**Timely and technically accurate accounting is indispensable to a successful business combination.**

This seminar will help you understand and apply accounting for acquisitions (ASC 805), non-controlling interests (ASC 810), intangible assets (ASC 350 and 360), goodwill (ASC 350), and the related deferred tax effects.

We go beyond merely describing these standards by explaining their logic and consequences via hands-on spreadsheet-based examples, detailed journal entries, and real cases. We discuss their implications for M&A structuring and future EPS, which improves collaboration with the finance team.

## **Agenda:**

- Overview of the acquisition method with practical examples covering the core concepts of fresh-start accounting
- Definition of a business and how to determine if a transaction is a business combination
- Cost of acquiring the target, contingent consideration, and share-based awards
- Allocation of the acquisition cost to the acquired assets and assumed liabilities
- Deferred tax consequences of step-ups
- Intangible assets and goodwill (ASC 350 and ASC 360)
- Two-step test for goodwill impairment
- Accounting for non-controlling interests (ASC 810)

## **Technical Accounting**

### **Course objective:**

Provide participants with an in-depth understanding of how to apply the FASB pronouncements on business combinations, including the information needed to determine journal entries in specific situations and the appropriate financial statement disclosures.

**Prerequisite:** Basic knowledge of U.S. GAAP

**Preparation:** None

**Level of knowledge:** Intermediate

**Estimated CPE credits:** 16 hrs

**Field of study:** Accounting

**Delivery method:** In-person, Live Virtual

**Course leader:** Dan Gode, Co-founder, Almaris E-Learning Systems

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

### Course objective:

Provide an in-depth understanding of how to apply ASC 718, including the information needed to determine journal entries in specific situations and the appropriate financial statement disclosures.

**Prerequisite:** Basic knowledge of U.S. GAAP

**Preparation:** None

**Level of knowledge:**  
Intermediate

**Estimated CPE credits:** 8 hrs

**Field of study:** Accounting

**Delivery method:** In-person,  
Live Virtual

**Course leader:** Dan Gode,  
Co-founder, Almaris E-Learning  
Systems

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

# Accounting for Share-Based Payments

**Companies which pay employees in equity as well as salary know that accounting for stock-based compensation under ASC 718 (FAS 123R) can be somewhat bewildering.**

The requirements of ASC 718 are particularly complex for equity-classified awards because accountants are not used to the underlying concept of modified-grant-date accounting. To address this challenge, the seminar goes beyond a mere description of the technical requirements; it explains the underlying concepts and their rationale via practical hands-on spreadsheet-based examples. These examples help the participants grasp complex issues relating to expected volatility, expected terms, conditions imposed on awards, classification, modifications, business combinations, deferred taxes, EPS, and disclosures.

This seminar also incorporates the latest relevant accounting bulletins so that attendees come away with practical, need to know guidance.

### Agenda:

- Covers a range of share-based compensation including the following:
  - Non-qualified Stock Options (NQO)
  - Incentive Stock Options (ISOs)
  - Unvested stock with and without 83(b) elections
  - Employee Stock Purchase Plans (ESPPs)
- Measurement of fair value and the effect of expected term and volatility
- Classification of awards as equity or liability based on service, performance, market, and other conditions
- Recognition of compensation costs
- Modification of awards
- Business combinations
- Disclosures and earnings per share

# Accounting for Foreign Operations

**This seminar describes the technical requirements and provides in-depth coverage of accounting for foreign currency transactions, remeasurements and translations per FASB ASC 830.**

Learn the standard's underlying concepts and their rationale using practical hands-on spreadsheets to break down foreign transaction calculations, discuss practical implementation issues, and how the standard affects interpretation of financial statements with your peers.

## **Agenda:**

- An overview of the concepts underlying the five-step process used to account for foreign currency transactions, remeasurements, and translations
- Determining the functional currency
- Translations under the current rate method
- Remeasurements under the temporal method
- Foreign currency transactions
- Multi-level consolidations
- Intercompany transactions and consolidations
- Statement of cash flows and foreign operations

Please note: The *Derivatives and Hedging Foundations* seminar covers accounting for foreign currency derivatives.

## Technical Accounting

### **Course objective:**

Give participants an in-depth understanding of how to apply the FASB pronouncements on accounting for foreign operations, including the information needed to determine journal entries in specific situations, and the appropriate financial statement disclosures.

**Prerequisite:** Basic knowledge of U.S. GAAP

A laptop with Excel 2010 is required. We use Excel 365 in the seminar. A working knowledge of Excel is required (advanced knowledge of Excel, such as macros, is not needed).

**Preparation:** None

**Level of knowledge:** Intermediate

**Estimated CPE credits:** 8 hrs

**Field of study:** Accounting

**Delivery method:** In-person, Live Virtual

**Course leader:** Dan Gode, Co-founder, Almaris E-Learning Systems

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

### Course objective:

Give participants an in-depth understanding of how to apply the FASB requirements for cash flow statements, including the information needed to determine journal entries in specific situations and the appropriate financial statement disclosures.

**Prerequisite:** Basic knowledge of U.S. GAAP

**Preparation:** None

**Level of knowledge:**  
Intermediate

**Estimated CPE credits:** 8 hrs

**Field of study:** Accounting

**Delivery method:** In-person,  
Live Virtual

**Course leader:** Dan Gode,  
Co-founder, Almaris E-Learning  
Systems

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

# Statement of Cash Flows

**Preparing cash flow statements is challenging because you need a comprehensive, logical, and efficient process to prepare statements per FASB ASC 230 in a limited time.**

This seminar uses detailed numerical examples showing the reconciliation of net income to operating cash flows. It also covers real cases and SEC comment letters to explain the judgment required in classifying cash flows and the effect of significant non-cash events, foreign operations, derivatives, acquisitions, leases, bonds, securitizations, and equity investments.

### Agenda:

- Overview of a logical and efficient process to prepare the cash flow statement
- The judgment required in classifying cash flows into operating, investing, financing
- Other comprehensive income, discontinued operations, and equity transactions
- Special issues relating to the following:
  - Deferred taxes
  - Foreign currency remeasurements and translation
  - Equity investments
  - Acquisitions, consolidations, non-controlling interests, and dispositions
  - Significant non-cash events
  - Leases
  - Premium and discount on bonds
  - Derivatives and hedging
  - Securitizations

# Introduction to SEC Reporting & Compliance

**Geared toward finance professionals who are new to SEC reporting, this live virtual seminar provides a practical introduction to SEC reporting and compliance, with an emphasis on understanding the rules, forms, and SEC guidance.**

Actual SEC filings and case studies are integrated into the course to demonstrate how the regulations are implemented in practice.

By the end of this course, participants should be able to:

- Describe the SEC, its operations, and organization
- Differentiate between the 1933 Act and 1934 Act
- Recognize and explain the statutes, rules, and forms (10-Q, 10-K, 8-K)
- Recognize the SEC guidance (including comment letters) that is implemented in practice.

## SEC Reporting and MD&A

### Course objective:

Provide attendees with a basic understanding of the SEC (Securities and Exchange Commission), as well as the reporting requirements for public companies including the rules, forms, and SEC guidance.

**Prerequisite:** None

**Preparation:** None

**Level of knowledge:** Basic

**Estimated CPE credits:** 4 hrs

**Field of study:** Accounting

**Delivery method:** Live Virtual

**Course leader:** Mary Anne Busse, former senior counsel in the Division of Corporation Finance at the SEC and currently managing director of Great Disclosure, LLC

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

## SEC Reporting and MD&A

### Course objective:

Provide a basic understanding of how to prepare the Management's Discussion and Analysis section of the SEC's Form 10-K annual report and 10-Q quarterly report, including appropriate disclosures.

**Prerequisite:** Intermediate understanding of Form 10-K; *Introduction to SEC Reporting & Compliance*; *Intermediate SEC Reporting & Compliance*; intermediate knowledge of U.S. GAAP; or equivalent knowledge

**Preparation:** None

**Level of knowledge:**  
Intermediate

**Estimated CPE credits:** 8 hrs

**Field of study:** Accounting

**Delivery method:** In-person,  
Live Virtual

**Course leader:** Mary Anne Busse, former senior counsel in the Division of Corporation Finance at the SEC and currently managing director of Great Disclosure, LLC

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# MD&A Disclosures Workshop

**Public companies are increasingly focused on the quality of Management's Discussion and Analysis (MD&A) disclosures in SEC filings. Learn how to expand and improve the effectiveness and compliance of your MD&A disclosures at this live virtual seminar.**

Using case studies, participants will evaluate and critique MD&A disclosures and discuss how to apply these insights to their own MD&A disclosures.

By the end of this course, participants should be able to:

- Recall the requirements for MD&A
- Discuss and critique example MD&As, focusing on key topical issues
- Plan for and prepare disclosures such as key performance indicators, trend information, critical accounting estimates, and executive overviews using common practices in drafting guidance
- Explain key MD&A developments including SEC guidance on climate-related disclosures, cybersecurity disclosures, non-GAAP disclosures, SEC releases, comment letters, speeches, and disclosure best practices.

It is assumed you have mastered the topics covered in our Introduction to SEC Reporting & Compliance program as well as our Intermediate SEC Reporting & Compliance program.



# Intermediate SEC Reporting & Compliance

**Take your SEC skills to the next level in this live virtual seminar. This course provides intermediate guidance in SEC reporting and compliance for financial professionals at public companies or companies planning an IPO.**

By the end of this course, participants should be able to:

- Prepare sections of annual reports (Form 10-K), quarterly reports (Form 10-Q), current reports (Form 8-K), and proxy statements in compliance with SEC disclosure requirements
- Describe current issues on the SEC's agenda such as climate-related disclosures, cybersecurity disclosures, non-GAAP disclosures, management-related disclosures, and trends in SEC comments.

SEC filings and case studies are integrated into the course to demonstrate how the regulations are implemented in practice. Tips for dealing effectively with SEC staff are provided.

It is assumed you have mastered the topics covered in our foundational program, *Introduction to SEC Reporting & Compliance*, and have a basic understanding of the SEC, its operations, the statutes, and forms.

## SEC Reporting and MD&A

### Course objective:

Provide participants a basic understanding of how to prepare the SEC Form 10-K annual report, Form 10-Q quarterly report, and Form 8-K current report, as well as comply with the annual proxy requirements.

**Prerequisite:** *Introduction to SEC Reporting & Compliance*; basic to intermediate knowledge of U.S. GAAP; or equivalent knowledge

**Preparation:** None

**Level of knowledge:** Intermediate

**Estimated CPE credits:** 16 hrs

**Field of study:** Accounting

**Delivery method:** In-person, Live Virtual

**Course leader:** Mary Anne Busse, former senior counsel in the Division of Corporation Finance at the SEC and currently managing director of Great Disclosure, LLC

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

## SEC Reporting and MD&A

### Course objective:

Provide a more advanced understanding of disclosure requirements and best practices affecting Form 10-K annual reports.

**Prerequisite:** Intermediate understanding of Form 10-K; *Introduction to SEC Reporting & Compliance*; *Intermediate SEC Reporting & Compliance*; intermediate knowledge of U.S. GAAP; or equivalent knowledge

**Preparation:** None

### Level of knowledge:

Advanced

**Estimated CPE credits:** 8 hrs

**Field of study:** Accounting

**Delivery method:** In-person,  
Live Virtual

**Course leader:** Mary Anne Busse, former senior counsel in the Division of Corporation Finance at the SEC and currently managing director of Great Disclosure, LLC

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# Advanced SEC Reporting Workshop

**It takes top-notch skills to prepare key SEC forms – including Form 10-K, Form 10-Q, and Form 8-K – given the level of detail required and the potential level of scrutiny by the SEC.**

Gain an advanced understanding of complex reporting scenarios at this live virtual seminar, which takes a deep dive into Exchange Act disclosure requirements and relevant regulations including Regulation S-X and Regulation S-K. It is intended for experienced SEC reporting professionals.

By the end of this course, participants should be able to:

- Effectively plan and prepare key Exchange Act forms including Form 10-K, Form 10-Q and Form 8-K while considering best practices and complex reporting scenarios
- Apply financial data, MD&A, and financial statement considerations in the preparation process
- Discuss key business issues, risk factors, and executive compensation components as well as disclosure trend considerations
- Explain the latest issues facing reporting entities including climate-related disclosures, cybersecurity disclosures, non-GAAP financial measures, benchmarking, and Disclosure Committee best practices.

SEC filings and case studies are integrated into the course to demonstrate how the regulations are implemented in practice.

It is assumed you have mastered the topics covered in our *Introduction to SEC Reporting & Compliance* program as well as our *Intermediate SEC Reporting & Compliance* program.



**“I’ve attended at least two KPMG Executive Education events each year for several years. Great investment of my time!**

*—Senior Vice President/Chief Accounting Officer, Specialty Consumer Finance Company*

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**“It provides me with necessary technical training in financial reporting and successfully pushes me to think outside the box.**

*—Manager of Financial Reporting, Pet Services and Solutions Provider*

**Course objective:**

Using facilitated discussion and exercises, this course is designed to give participants detailed insights on the Environmental, Social and Governance (ESG) landscape and prepare them to develop their ESG reporting strategy.

**Prerequisite:** None

**Preparation:** None

**Level of knowledge:**  
Intermediate

**Estimated CPE credits:** 8 hrs

**Field of study:** Accounting

**Delivery method:** In-person,  
Live Virtual

**Course leader:** Barbara Porco,  
PhD, CPA, CFF

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

# ESG Reporting: Building Enterprise Value and Sustainability

**Companies are increasingly being held responsible for performance and disclosure on a variety of environmental, social, and governance (ESG) factors by investors, regulators and other stakeholders.**

Finance and accounting teams need to meet these reporting demands and demonstrate they have a clear strategy that drives sustainability. In this eight-hour course, you will examine the ESG landscape and the strategic drivers to develop and manage your ESG reporting strategy.

Through examples, leading practices and tools, you will learn the key considerations to conduct a maturity and materiality assessment, and to collect and manage ESG data. You will gain insights into the advantages of sustainable supply chains and learn about the SEC emerging regulatory disclosure requirements, including the proposed climate-related disclosures. Lastly you will determine the inputs to develop an ESG reporting roadmap and understand the role of finance and accounting teams in embedding ESG strategy.

**By the end of this course, participants should be able to:**

- Leverage ESG as a framework to integrate environmental, social and governance risks and opportunities into your company's strategy
- Determine where you are on an ESG program maturity scale
- Define the concept of materiality related to ESG performance and disclosure
- Recognize the importance of ESG data collection and management
- Explain the relevance of ESG issues, risks, and opportunities within supply chains.
- Examine the global and U.S. regulatory developments and frameworks
- Review the SEC proposal on climate-related disclosures and the impact on your business
- Explain the impact of climate risk on your organization's financial performance and disclosures
- Determine inputs to develop an ESG reporting strategy to sustain your reporting environment and prepare for assurance.

# M&A: Preparing for the Deal

## **Mergers & acquisitions have the potential to rapidly create or destroy value for enterprises and their owners.**

This seminar provides professionals at all levels with the tools and framework to develop and enhance their organization's M&A strategy and lead their organization through the M&A process.

The most significant opportunities to add value and overcome obstacles are the primary focus of this interactive, live virtual course, which allows attendees to learn from real-world case studies, engage in exercises, participate in discussions, share their own examples, and ask questions.

By the end of this course, participants should be able to:

- Develop a strategic M&A plan for their company
- Provide value-creating insights and solutions throughout the M&A process
- Guide their company through the M&A process
- Apply the fundamentals of business valuation as it relates to M&A
- Construct a deal structure that addresses deal obstacles, objections, and motivations of the parties involved
- Develop a productive negotiation strategy and style
- Create an effective letter of intent
- Recall the key elements of the due diligence and closing processes for a transaction

## Finance & Business Management

### **Course objective:**

Provide participants with strategic insights and tools that will enable them to be successful when engaging in M&A activities.

**Prerequisite:** None

**Preparation:** None

**Level of knowledge:**  
Intermediate

**Field of Study:** Finance

**Delivery Method:** Live Virtual

**Course leader:** Christopher Novak, Partner, Roadmap Advisors

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

**Course objective:**

Provide participants with the tools they need to communicate complex financial information effectively and develop an engaging and audience-focused presentation style.

**Prerequisite:** None

**Preparation:** None

**Level of knowledge:** Basic

**Estimated CPE credits:** 6 hrs

**Field of study:** Marketing & Communications

**Delivery method:** Live Virtual

**Course leaders:** Facilitators from Exec|Comm, a business-communications-skills consulting firm offering seminars and training in effective sales, meeting management, and leadership training

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

# Executive Presence for Finance Professionals

**Up your game when it comes to how you act, look and communicate with your audiences – peers, the c-suite, the board, regulators and investors. This highly interactive virtual seminar is designed to help you recognize and strengthen your leadership qualities and cultivate a strong executive presence.**

When you begin your career as a finance professional, you focus primarily on the numbers. You become increasingly proficient technically, and you gain knowledge about how the numbers impact an organization. As you move up in the ranks, you need to acquire additional skills.

To succeed in your next career step, you must communicate complex financial information in a compelling way and connect effectively with key stakeholders, who look to you for insights and guidance about the numbers. **Throughout the seminar, attendees spend time presenting and sharing feedback to develop their executive presence.** Instructor briefings combined with small group exercises aim to strengthen communication skills and advance professional growth.

By the end of this course, participants should be able to:

- identify tools and strategies that help make a strong first impression
- apply relational body language skills to effectively communicate in person or virtually
- demonstrate effective business storytelling by defining the purpose, choosing the story and structuring the plot
- describe best practices that authentic and vulnerable professionals and leaders employ
- apply mindfulness techniques to enhance emotional intelligence, manage stress, become more alert and improve memory.



# Optimizing Accounting & Finance with Advanced Excel

## Become an Excel power user and boost your productivity.

Taught by an instructor with an extensive accounting and programming background, this seminar helps you apply advanced Excel techniques to accounting and finance problems uniquely.

By the end of this course, you should be able to:

- Organize spreadsheets to optimize teamwork and analyze scenarios
- Create concise and understandable spreadsheets that reduce the risk of errors
- Utilize advanced Excel techniques to automate and condense schedules, build scenarios, and make spreadsheets responsive.

We provide 50+ detailed spreadsheets to illustrate and explain Excel concepts.

### Agenda:

- Build accounting and finance schedules efficiently via transpose and shift.
- Automate and condense schedules via SUMPRODUCT and ARRAY.
- Build scenarios via LOOKUP, OFFSET, and INDIRECT.
- Give spreadsheets a consistent look that can be changed easily via Excel Styles and Add-ins.
- Separate inputs from outputs.
- Build easy-to-update spreadsheets by (1) avoiding complex functions, nested ifs, and iterations and (2) integrating monthly, quarterly, and annual data
- Make spreadsheets responsive via Custom Formatting, Data Validation, Spinners, List Boxes, Sliders, INDEX, MATCH, OFFSET, and INDIRECT.
- Perform what-if analysis via DATA and PIVOT TABLES.
- Stress-test future cash flows via SOLVER and GOAL SEEK.

We use Excel 365 on Windows. Mac shortcuts will be provided but not demonstrated. We do not cover Excel VBA or Excel charting (except to build charts whose scales adjust automatically as input data changes).

## Finance & Business Management

### Course objective:

Provide an understanding of how to utilize advanced Excel functionality in accounting and finance roles.

**Prerequisite:** Intermediate knowledge of Excel, including commonly used keyboard shortcuts and functions, is assumed. The seminar will use Excel 365 on Windows.

**Level of knowledge:** Intermediate

**Estimated CPE credits:** 8 hrs

**Field of study:** Accounting; Computer Software & Applications

*Up to 2 Accounting credits can be earned by attending this seminar.*

**Delivery method:** In-person, Live Virtual

### Course leader:

Dan Gode, Co-founder, Almaris E-Learning Systems

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

**Course objective:**

Provide an understanding of how to develop financial statement models and to more efficiently and effectively analyze information.

**Prerequisite:** it is our recommendation that you consider attending the *Optimizing Accounting & Finance with Advanced Excel* course as those topics are required to effectively participate in this session. A laptop with Excel 2010 or above is required.

A strong working knowledge of Excel is required. We use Excel 365 in the seminar.

**Preparation:** None

**Level of knowledge:**  
Intermediate

**Estimated CPE credits:** 16 hrs

**Field of study:** Finance

**Delivery method:** In-person,  
Live Virtual

**Course leader:** Dan Gode,  
Co-founder, Almaris E-Learning  
Systems

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

# Modeling & Projecting Financial Statements

**Modeling financial statements is critical to financial planning and analysis, business development, valuation, and credit risk analysis.**

The seminar helps accounting and finance professionals weave business and financial forecasts into spreadsheet-based financial statement projections. It shows you how to break down models into manageable components and explains how the modeling sequence differs from how the accounting entries are made. It teaches best practices regarding integrating business drivers, accounting, Excel, finance, and financial programming to produce “well-engineered” models.

This seminar assumes that you are familiar with the topics covered in *Optimizing Accounting and Finance with Advanced Excel* seminar that precedes this seminar.

**Agenda:**

- Overview: Six key business drivers – Size, growth, margins, asset intensity, business risk, and financial risk; Two major parts of a model - enterprise and financial
- Best practices: Building models that reflect how management views a business and are error-free, understandable, and easy to update
- Enterprise activities: Revenues, expenses, and related accruals and deferrals
  - Modeling revenues, receivables, and deferred revenues
  - Modeling expenses, payables, and prepaid costs
  - Modeling multi-period effects: Long-term receivables, deferred revenues, accrued expenses, and deferred expenses (PP&E, intangible assets)
  - Modeling current and deferred taxes
  - Understanding and forecasting enterprise free cash flows
- Financial activities: Financial assets, financial liabilities, and equity
  - Deriving funding needs, modeling liquidity, and leverage
  - Cost of capital and risk; Terminal growth and terminal value

Refreshed

# Internal Controls: Optimized and Modernized

**ICFR (Internal Controls over Financial Reporting) can be viewed as a compliance exercise, or you can use it to drive excellence in your business.**

Over time, SOX has evolved with the increasing complexity of accounting standards. Attend this seminar to benefit from KPMG's observations from years of work with thousands of clients to help streamline, automate, improve and transform internal controls. We'll discuss aligning risk and ICFR focus, managing SOX hours, the use of data & analytics and the potential for intelligent automation.

In addition, we'll discuss the current PCAOB inspection focus areas, the implications of new accounting standards and the impact of evolving business structures on internal controls. We'll share real-life examples and lead activities to allow you to consider the impact of the issues discussed on your own ICFR program.

By the end of this course, participants should be able to:

- Recall the SEC and PCAOB's recent areas of focus around ICFR
- Recognize hot topics on ICFR programs such as , cyber security and ESG
- Demonstrate ways to enhance an ICFR program to make it more effective and efficient
- Discuss how to use data & analytics and automation to enhance SOX programs and first-line controls

## Finance & Business Management

### Course objective:

By the end of this course, participants should be able to discuss current issues in ICFR and ways to improve the efficiency and effectiveness of a corporate SOX program.

**Prerequisite:** Baseline understanding of ICFR and experience working with internal controls

**Preparation:** None

**Level of knowledge:** Update

**Estimated CPE credits:** 8 hrs

**Field of study:** Audit

**Delivery method:** In-person, Live Virtual

### Course leaders:

Partners and Directors from KPMG's Internal Audit and Enterprise Risk Advisory Practice and Technology Risk Management

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

**Course objective:**

Provide participants with the tools and skills they need to deliver complex financial information from PowerPoint and other visual media, while developing an engaging and audience-focused delivery style.

**Prerequisite:** None

**Preparation:** Please bring a presentation that you have delivered recently or one that you plan to deliver soon. Bring your laptop with your presentation loaded onto it. If you present using handouts, or a PowerPoint deck presentation, please bring three copies of the presentation materials with you, in addition to your laptop

**Level of knowledge:** Basic

**Estimated CPE credits:** 8 hrs

**Field of study:**  
Communications

**Delivery method:** In-person,  
Live Virtual

**Course leaders:** Facilitators from Exec|Comm, a business communications skills consulting firm offering seminars and training in effective sales, meeting management, and leadership training

For session details and more information, please visit us at [www.kpmglearning.com](http://www.kpmglearning.com)

# Presentation Skills for Finance Professionals

**In the world of finance and accounting, how you present information can be as important as what information you present.**

This seminar helps finance professionals successfully manage their presence, information and audience interaction when conveying complex data and concepts to both financial and nonfinancial audiences.

It provides organizational formats for sharing information as well as extensive practice on the key skills that enhance a professional's impact when presenting. With both instructor briefings and small group practice, participants will learn to deliver information from PowerPoint for a large group, and while at a meeting.

**Agenda:**

- Introduction to presentation skills
- Refining your executive presence
- Connecting with your audience
- Managing your physical presence
- Using visual aids with impact
- Developing your presentation
- Practicing your delivery
- Conducting sit-down presentations
- Delivering a complete business presentation
- Handling questions and answers
- Responding to emotional questions
- Controlling interruptions
- Creating a reinforcement plan





# Faculty

In addition to KPMG professionals, KPMG Executive Education utilizes an outside faculty of instructors who are knowledgeable and experienced in specific fields. We continually strive to select instructors who not only possess a practical understanding of the topics, but are also highly skilled and dynamic facilitators.

**Brian Ballou**, Ph.D., CPA has actively taught, researched, and worked with executives in governance, executive leadership, enterprise risk management, business reporting, and assurance in varying capacities since 1996. His graduate-level governance, risk management, and stakeholder reporting course sequence is one of the only courses of its kind in the United States and is taught utilizing a corporate governance perspective. He has conducted executive education courses on enterprise risk management and stakeholder management since 2001. He also has taught, researched, and worked with executives in governance-oriented, business risk based auditing approaches since 1998, including extensive seminars conducted for KPMG throughout the United States each summer since 1999. He also has been an active leader in innovating the MBA curriculum and Department of Accountancy curriculum to evolve both to help develop adaptable, flexible students for the data-driven business environment of the 21st Century (*Fair Value Accounting: Guidance and Application*)

**Mary Anne Busse** is a nationally recognized leader in disclosure and governance, having served for several years in various capacities with the Securities and Exchange Commission in Washington, D.C. Ms. Busse is currently Managing Director for Great Disclosure LLC, a consulting firm providing training and assistance on securities disclosure, investor relations, corporate governance and corporate communications. (*Introduction to SEC Reporting & Compliance, Banking SEC Reporting & MD&A Disclosures, MD&A Disclosure Workshop, Intermediate SEC Reporting & Compliance, Advanced SEC Reporting Workshop*)

**Dan Gode** continually receives top marks for his ability to present complex financial topics in an understandable, lively, and practical format. Dan regularly consults with and teaches at leading financial institutions, corporations, and hedge funds. Dan is the co-founder of Almaris Consulting and Training. He holds a PhD degree in accounting and information systems from Carnegie Mellon University. (*Accounting for Business Combinations, Accounting for Foreign Operations, Accounting for Income Taxes, Optimizing Accounting & Finance with Advanced Excel, Accounting for Share-based Payments, Advanced Accounting for Income Taxes, Modeling & Projecting Financial Statements, Lease Accounting, Statement of Cash Flows*)

**Christopher Novak**, CFA, is an experienced investment banker, serving for more than 20 years as a trusted advisor to public and private companies, family offices, and private equity funds. He has successfully completed hundreds of M&A, capital raise, and other advisory engagements for clients throughout the U.S. and internationally. Chris is a founding Partner of Roadmap Advisors, a Chartered Financial Analyst, FINRA Registered Rep, and serves on the boards of numerous companies. (*M&A: Preparing for the Deal*)

# Faculty

**Dr. Barbara Porco PhD, CPA, CFF** is a member of the accounting faculty for over twenty-five years and holds a certification in corporate sustainability and innovation and a master's degree in sustainability and environmental management from Harvard University and in ESG Executive Certificate Senior Leaders Program from The Wharton School. (*ESG Reporting: Building Enterprise Value and Sustainability*)

She proudly serves on the AICPA's Sustainability Assurance and Advisory Task Force as an academic representative for extended external reporting (EER) assurance and maintains her Certified Public Accountant license and her designation as a certified in financial forensics. (*ESG Reporting: Building Enterprise Value and Sustainability*)

**Facilitators of ExecComm, LLC**, a business communications skills consulting firm offering seminars and training in effective sales, meeting management, and leadership training. (*Presentation Skills for Finance Professionals, Executive Presence for Finance Professionals*)





# To register

**Online:** [www.kpmglearning.com](http://www.kpmglearning.com)

**The fees indicated for each course cover all learning materials, instructions, and food and beverages, if applicable.**

Discounts are available for early registrations, groups or KPMG Alumni.

Please contact KPMG Executive Education at 201-505-6062 or [us-kpmglearning@kpmg.com](mailto:us-kpmglearning@kpmg.com) for more information.

If paying by check for an In-person seminar, please make checks payable to KPMG LLP—Executive Education\*.

If you would like to register for a virtual seminar using held tuition credit, please e-mail KPMG Executive Education at [us-kpmglearning@kpmg.com](mailto:us-kpmglearning@kpmg.com).

*\*Payment via check is not available for Live Virtual Seminars.*

**Individuals who register for any 2 KPMG Executive Education Seminars can save!\***

Apply coupon code COMBO300 at checkout to receive \$300 off the combined purchase price of 2 In-person Seminars

Apply coupon code COMBO200 at checkout to receive \$200 off the combined purchase price of 2 Live Virtual Seminars.

\*Discounts cannot be combined and must be applied at time of initial registration.

# Accreditations

## NASBA CPE Sponsor

KPMG LLP is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org)

# Cancellation policy

Please contact the KPMG Executive Education registrar at [us-kpmglearning@kpmg.com](mailto:us-kpmglearning@kpmg.com) or 201-505-6062 to cancel your In-person or Live Virtual Seminar registration.

## In-person Seminars

Participants that have registered for an In-person KPMG Executive Education course who notify the registrar more than 7 full business days before a session may receive a full credit\* toward another Executive Education course or a refund of their tuition less a \$195 administrative service charge per course.

Registrants cancelling between 7 full business days and 4 full business days of the program start date are eligible to receive a held tuition credit.\*

*\* Held tuition credits will expire one year from the start date of the program originally cancelled and can be used by the original registrant or another member of their company to attend an Executive Education public seminar being held at any time before such expiration date or to purchase a digital self-study prior to such expiration date.*

Please note that at any time, a colleague can be substituted in the registrant's place.

## Live Virtual Seminars

Participants registered for a Live Virtual Seminar who notify the registrar more than 7 full business days before a session may receive a refund of their tuition less a \$195 administrative service charge per course.

Registrants cancelling between 7 full business days and 4 full business days of the program start date may receive a 50% refund.

Please note that a colleague can be substituted in the registrant's place as long as the registrar is notified prior to the start of Part 1. This substitution will be for the entirety of the course.

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Registrants for both **In-person** and **Live Virtual Seminars** who fail to attend a program for which they are registered, as well as those who notify the registrar of their cancellation within 3 full business days of the program start, will be assessed the full program fee.



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