

Audit Nightmares - LumiQ Podcast Learning Path

 Available for 1 year after purchase date  **OnDemand** 9.00 Credits  Member Price: \$180

Join LumiQ's resident auditors as they investigate real world case studies of audits gone wrong. Whether it's negligence or fraud committed with the intention to mislead, these episodes break down the key assertions that were at risk and what auditors need to know so that they don't repeat these mistakes. Episodes in this learning path include:- Audit Nightmares: Expenses- Audit Nightmares: Revenue Recognition- Audit Nightmares: Bank Confirmations- Audit Nightmares: Inventory Counts- Audit Nightmares: Related Party Transactions After purchasing this product you will receive an email from LumiQ with instructions for accessing the learning path on their web, iOS, or Android applications.

Business Development: Foundations - LumiQ Podcast Learning Path

 Available for 1 year after purchase date  **OnDemand** 7.50 Credits  Member Price: \$150

This learning path equips public accounting professionals with the relationship-building skills that drive long-term career success. From networking and personal branding to rapport-building and making an impact within your firm, this learning path offers practical strategies to help you build stronger professional connections and create new opportunities. Episodes in this learning path include:- Get Ahead of the Game: Business Development for Junior Staff- The Power of LinkedIn: Business Development & Networking for CPAs- Networking in a Hyper-Connected World- How the FBI Trains its Agents to Build Rapport- Business Development: Making An Impact at Your Firm After purchasing this product you will receive an email from LumiQ with instructions for accessing the learning path on their web, iOS, or Android applications.

Business Development: Leadership - LumiQ Podcast Learning Path

 Available for 1 year after purchase date  **OnDemand** 9.00 Credits  Member Price: \$180

This learning path is designed for emerging leaders in public accounting looking to strengthen their ability to drive growth, influence relationships, and contribute strategically to their firm. Through practical discussions on sales processes, negotiation, thought leadership, and client dynamics, this learning path helps managers and future leaders develop the business development mindset needed to lead with confidence and create lasting impact. Episodes in this learning path include:- Standardizing Your Firm's Sales Process- From Theory to Practice:

Sales Methodologies Explained- Mastering Negotiation: Tough Client Conversations in Public Accounting- Navigating Cognitive Dissonance in Internal and Client Relationships- First Steps to Becoming A Thought Leader- Managing Peaks and Valleys Through Sales ForecastingAfter purchasing this product you will receive an email from LumiQ with instructions for accessing the learning path on their web, iOS, or Android applications.

Business Transformation in Practice - LumiQ Podcast Learning Path

 Available for 1 year after purchase date  **OnDemand** 9.50 Credits  Member Price: \$190

Through real-world business case studies, this learning path illustrates how organizations navigate disruption, changing markets, and strategic inflection points. You'll uncover the decisions, challenges, and leadership lessons that determine whether a company successfully reinvents itself or falls behind. Episodes in this learning path include:- Rebuilding LEGO: The Innovation Comeback- What Really Killed Kodak?- Disney's Acquisition of Pixar- Driving Success: Liberty Media's Acquisition of Formula 1After purchasing this product you will receive an email from LumiQ with instructions for accessing the learning path on their web, iOS, or Android applications.

Client Advisory Services: Level 1 - LumiQ Podcast Learning Path

 Available for 1 year after purchase date  **OnDemand** 9.50 Credits  Member Price: \$190

Client Advisory Services (CAS) is broken out into three levels: accounting, controllership, and CFO-level services. In this Level 1 learning path, we're getting down to the basics of how to execute accounting-level services. We cover key concepts of accounting theory, how to record journal entries, how to complete the month-end close process, and best practices for understanding financial statements and communicating financial insights to your clients. We even take a sneak peek into Level 2 services with an introduction to budgeting and forecasting. Mastering accounting-level services is the basis for escalating to Level 2 and 3 and becoming a full-suite trusted advisor for our clients... So let's get started! Episodes in this learning path include:- CAS Episode #1: Introduction to Client Advisory Services- CAS Episode #2: Accounting & Financial Statement Basics- CAS Episode #3: The Month-End Close Process- CAS Episode #4: Financial Statement Analysis- CAS Episode #5: Introduction to Budgeting- CAS Episode #6: Introduction to Forecasting- CAS Episode #7: Sales Tax for CAS PracticesAfter purchasing this product you will receive an email from LumiQ with instructions for accessing the learning path on their web, iOS, or Android applications.

Client Advisory Services: Level 2 - LumiQ Podcast Learning Path

 Available for 1 year after purchase date  **OnDemand** 6.50 Credits  Member Price: \$130

Client Advisory Services (CAS) is broken out into three components: accounting, controllership, and CFO-level services. In this Level 2 Learning Path, we take a deep dive into accounting-level services through transaction accrual accounting. In conversation with leaders in the CAS industry, we walk through select financial statement accounts that have specific nuances and complexities when booking their related accruals and share best practices for CAS teams. Episodes in this learning path include:- CAS Level 2: Episode #1 - Working Capital Accruals- CAS Level 2: Episode #2 - Fixed Asset Accounting- CAS Level 2: Episode #3 - Payroll Process- CAS Level 2: Episode #4 - Debt Accounting- CAS Level 2: Episode #5 - Inventory Accounting After purchasing this product you will receive an email from LumiQ with instructions for accessing the learning path on their web, iOS, or Android applications.

C-Suite Engagement - LumiQ Podcast Learning Path

 Available for 1 year after purchase date  **OnDemand** 8.50 Credits  Member Price: \$170

Access the mindset you need to engage with C-level executives, and recognize the critical roles of leadership, communication, and research to provide insight and lead your client's organization forward. Episodes in this learning path include:- C-Suite Engagement Part 1: The Professional's Dilemma- C-Suite Engagement Part 2: Your Evolving Value- C-Suite Engagement Part 3: Personal and Professional Fields of Play- C-Suite Engagement Part 4: Interpersonal Intelligence- C-Suite Engagement Part 5: Managing Relationships- C-Suite Engagement Part 6: Meeting with Executives- C-Suite Engagement Part 7: Value Propositions- C-Suite Engagement Part 8: Questioning and Listening After purchasing this product you will receive an email from LumiQ with instructions for accessing the learning path on their web, iOS, or Android applications.

Professionalism Fundamentals - LumiQ Podcast Learning Path

 Available for 1 year after purchase date  **OnDemand** 6.50 Credits  Member Price: \$130

Professionalism isn't just about doing good work, it's about how others experience working with you. This learning path covers the real-world habits that quietly shape your professional reputation. Learn practical, trust-building skills that help professionals work smarter, show up with confidence, and stand out for the right reasons. Episodes in this learning path include:- Professionalism Fundamentals: Calendar Management Essentials- Professionalism Fundamentals: Mastering Email Etiquette- Professionalism Fundamentals: Proofreading with Purpose- Professionalism Fundamentals: Making Meetings Count- Professionalism Fundamentals: Communicating with Your Manager After purchasing this product you will receive an email from LumiQ with instructions for accessing

the learning path on their web, iOS, or Android applications

Tax Foundations: Individual, Estate, and Trust - LumiQ Podcast Learning Path

 Available for 1 year after purchase date  **OnDemand** 9.00 Credits  Member Price: \$180

Master the basics of individual, estate, and trust taxation with our learning path, tailored to empower newcomers with foundational knowledge and practical insights. Episodes in this learning path include:- Popular Estate Planning Techniques- Help! I Owe the IRS Money!- Beyond 1099s: The Realities of International Tax Transparency- Taxation for US Expats- Retirement Planning for U.S. High Net Worth Individuals After purchasing this product you will receive an email from LumiQ with instructions for accessing the learning path on their web, iOS, or Android applications.

The Single Audit: Level 1 - LumiQ Podcast Learning Path

 Available for 1 year after purchase date  **OnDemand** 10.50 Credits  Member Price: \$210

Understanding and performing a single audit is a weighty task. The various requirements and nuances of the audit are enough to make your head spin! This learning path reviews the guidance for auditing federal grants and explains the key components of planning, executing, and reporting on single audits. And the best part... each episode in this learning path qualifies for your Yellow Book CPE requirement! Episodes in this learning path include:- Single Audit: Level 1 Episode #1 - An Overview of the Uniform Guidance & Single Audit- Single Audit: Level 1 Episode #2 - Major Program Determination- Single Audit: Level 1 Episode #3 - Compliance Supplement- Single Audit: Level 1 Episode #4 - 12 Compliance Requirements - Part 1- Single Audit: Level 1 Episode #5 - 12 Compliance Requirements - Part 2- Single Audit: Level 1 Episode #6 - Testing Internal Controls vs Compliance- Single Audit: Level 1 Episode #7 - Auditing the SEFA- Single Audit: Level 1 Episode #8 - Findings Structure & Common Examples After purchasing this product you will receive an email from LumiQ with instructions for accessing the learning path on their web, iOS, or Android applications.