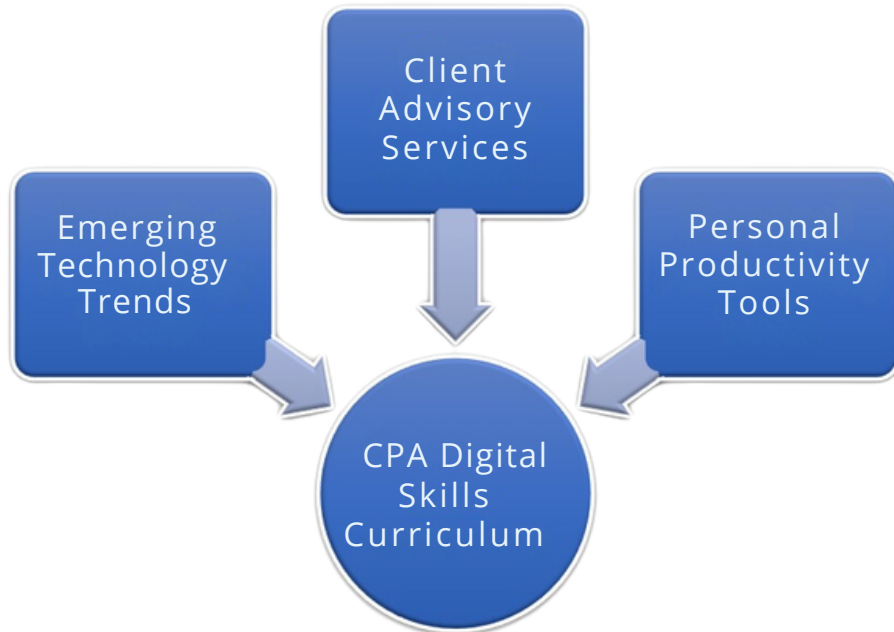




2024-25 CPA DIGITAL SKILLS EDUCATION

John Higgins, CPA.CITP

**In the swiftly transforming realm of business,
it's imperative for CPAs to expand their digital skills like never before.**



Higgins Advisory steps up to this pivotal challenge by crafting an expansive digital skills education program tailored for CPAs. This program is designed to equip CPA professionals across the spectrum with essential knowledge and competencies, empowering them to thrive in a competitive marketplace. This catalog enables you to present this transformative program to your members through diverse formats like conferences, specialized courses, interactive virtual presentations, and accessible on-demand platforms.

Emerging Technology Trends

Bitcoin Fundamentals - What Every CPA Should Know

The Bitcoin cryptocurrency has reached an elevated level of credibility in the financial markets due to the SEC's approval of the Bitcoin ETFs (Exchange Traded Funds). We are beginning to see wealth advisors and institutional investors adding bitcoin to their portfolio recommendations. Therefore, it is important for CPAs to have a fundamental understanding of this new asset class. This presentation will provide you with a solid foundation of knowledge about bitcoin and how it works.

Blockchain Technology: What Every CPA Should Know

The adoption of blockchain technology continues to march forward with new innovations and applications arriving on the scene on a continuous basis. Since this is a revolutionary model for storing data in a shared ledger model, it is imperative that CPAs develop a foundational understanding of what it is, how it works and the range of applications it is suited for. This presentation will provide you with a solid foundation of knowledge about blockchain technology and how it works.

ChatGPT: What Every CPA Should Know

This presentation will provide a primer on ChatGPT and generative AI technology and its potential impact. The concepts of generative AI will be explained, along with the nomenclature. Discussion and demonstration of practical applications for ChatGPT in a professional services firm will be provided.

ChatGPT Hands-on Bootcamp for CPAs

This half day hands-on course will get you well on your way to becoming a ChatGPT expert. John Higgins, a nationally recognized advisor and educator on CPA technology, will guide you through the process of accessing ChatGPT and applying it to a variety of practical accounting, finance and tax scenarios.

Cryptocurrency 15 Years Later - A Market Update with John Higgins

Bitcoin, the original cryptocurrency, was released in 2009. Fifteen years later, the cryptocurrency market consists of over 5,000 unique coins/tokens with a market capitalization of over 1.5 trillion as of 2024. This presentation will provide an update on the cryptocurrency market and the blockchain technology that supports it.

ChatGPT Hands-On Bootcamp for CPAs

Imagine a technology so groundbreaking that it has taken the world by storm, with over 100 million users adopting it in a few short months.

That's the power of ChatGPT!



Offered as 4-hour in-person or virtual session.

What's in it for your members?

- Gain practical, hands-on experience with ChatGPT
- Learn how to seamlessly integrate ChatGPT into accounting and finance tasks
- Supercharge efficiency and accuracy as a CPA
- [Click here for the full course description](#)

By the end of this half-day course, they won't just be ahead of the curve, they will be standing proudly at the top of the pyramid of CPAs who wield incredible power of ChatGPT!

Emerging Technology Trends

Ethics of Artificial Intelligence (AI): A CPA's Guide

The practical application of artificial intelligence (AI) in the accounting profession is spreading like wildfire with the release of powerful applications such as ChatGPT. A byproduct of this evolution is the origination of new ethical dilemmas for CPAs on how to address the use of this technology in the delivery of their services. This course will provide CPAs with a practical framework for addressing the various ethical issues that can arise with the application of AI in their work.

Integrating ChatGPT into Your Client Advisory Services

Two of the hottest topics in the accounting profession are CAS (client advisory services) and ChatGPT. This presentation will explain how you can integrate ChatGPT into your CAS services as a resource to conduct research and compose reports, as well as how to advise your clients on how they can take advantage of it in their organizations.

Technology Trends Update for CPAs with John Higgins

This enlightening presentation is where we delve into the pivotal technology trends reshaping the accounting profession. We will cover an array of topics including cloud computing, big data, data analytics, Robotic Process Automation (RPA), Machine Learning (ML), Artificial Intelligence (AI), cryptocurrency, blockchain technology, and the metaverse. Designed for forward-thinking professionals, this session offers insights into how these technologies impact your business, your firm, your clients and most importantly, your career.



Technology Trends Update for CPAs

**Embrace technology and
stay ahead in your field!**

Offered as 2, 3 or 4 CPE sessions

**As a conference session or stand
alone event**

In-person or virtual format



What's in it for your members?

- **Stay Current:** Get up-to-date on the latest technological advancements in the fields of accounting, finance, auditing, and business.
- **Comprehensive Overview:** An expansive exploration of a wide range of technologies, from personal devices to emerging mega technologies like blockchain, digital currency, AI, data analytics, and robotic process automation.
- **Informed Discussions:** Be well-prepared to engage in informed discussions with clients, colleagues, management, IT specialists, and service providers regarding the current technological landscape.
- **Relevance in Remote Work:** Be aware of the impact of technology in the context of the increasingly prevalent remote working environment.
- **Competitive Edge:** Enhance technological acumen to remain competitive and effective in the fast-paced changes of the digital age.
- Click [here](#) for the full course description.

Personal Productivity Tools

Adobe Acrobat Tips for Working with PDF Files

Review of key features of Adobe that will help you create, process and manage your PDF files with greater efficiency.

How to Use Adobe Acrobat to Create and Manage Fillable Forms

Eliminate the inefficient use of paper, Word or Excel to create fillable forms. Adobe Acrobat's fillable forms feature provides a superior solution that provides more structure and ease of use for creating and processing forms digitally.

Securing Your Data with a Password Management App

Explain and demonstrate how to use one of the most useful and important tools for managing all your login credentials and significantly enhance your cybersecurity protection.

Using e-Signature Software to Process Forms & Agreements

Learn how to use electronic signature software to manage the processing of engagement letters and other agreements in a 100% digital format that provides maximum security, confidentiality and efficiency. A review of top-selling solutions will be provided.



Microsoft 365

How to Use Microsoft 365 Forms to Create Online Surveys

Learn how to gather information digitally with this simple app for creating surveys and forms that are easy to complete and even easier to analyze with Excel.

Engagement Management with the Microsoft 365 Planner App

Learn how to deploy the Planner app as your primary engagement management tool to track task completion, engagement notes, workpapers and more.

Microsoft 365 Application Lightning Round Review

Do you use Microsoft (Office) 365? Are you satisfied that you are getting the most that you can from it? If you answered yes then no, this course will provide a really high return on your investment of time and money in this application suite. John will explain and demonstrate the depth and breadth of the Microsoft 365 ecosystem. The course is designed to raise your awareness of all that you can do with Microsoft 365 and substantially increase your monthly subscription ROI.

Microsoft 365 Copilot - Get Ready to Boost Your Productivity

The generative AI technology of ChatGPT is being embedded into the Microsoft 365 ecosystem. This presentation will provide a preview of the AI capabilities Copilot will bring to the apps you use every day to compose better email messages, documents, reports, spreadsheets, presentations and more. We will also discuss the steps you can take now to prepare your organization to embrace this new technology.

Microsoft 365 Deployment Best Practices

Review of best practices for deploying Microsoft 365 in a professional services firm to maximize your subscription fee ROI.

Microsoft 365 Deployment Bootcamp for CPAs with John Higgins (4 CPE)

Join us for an insightful presentation featuring John Higgins, a renowned technology advisor to the CPA profession, who has assisted many firms with Microsoft 365 deployment. Discover how to leverage the Microsoft 365 suite of apps to unlock new efficiencies and opportunities within your firm. Don't miss this chance to supercharge your practice with cutting-edge tools! Whether you are a solo practitioner or larger firm, this "bootcamp" will provide you with an ROI many times greater than your investment to attend.

Microsoft 365

Microsoft Outlook - Must Know Email Tips

Review of key features of Outlook that will help you compose, process and organize your email messages with greater efficiency.

Microsoft SharePoint & OneDrive - Everything You Need to Know

Data security and privacy protection is one of the most important responsibilities for CPAs and CFOs. The chances are you are already paying for one of the most secure cloud-based file storage solutions available. If you utilize Microsoft 365 in your organization, you have the opportunity to build your file storage solution on OneDrive and SharePoint within the Microsoft 365 Ecosystem. This presentation will walk you through a step-by-step guide for deploying OneDrive and SharePoint.

Use Microsoft Teams and SharePoint for Your Client Portal

A fundamental component of a digital CPA practice is a secure and easy-to-use client portal to exchange files via the cloud and the related communications/conversations. Part of the challenge is that deploying many of the portal solutions can be expensive and/or complicated to setup. John will explain and demonstrate how you can set up a comprehensive client portal solution using the Microsoft 365 Teams and SharePoint apps. If you already use Microsoft 365, the incremental software costs are zero!

Microsoft Teams Features Every User Should Know

For anyone who uses Teams, this presentation will review and demonstrate how to utilize all the features to manage conversations, files and linked content.

Microsoft Teams Deployment Best Practices

A "how to" review for deploying Microsoft Teams to get the most out of it and avoid costly setup mistakes.

OneNote - Mastering Organization of Your Notes & Correspondence

OneNote is rapidly becoming one of the most popular applications in the Microsoft 365 product suite. The reason for this becomes pretty evident when you learn about all that you can do with OneNote to record and manage notes, to do lists, meeting agendas and much more. This course will provide a thorough review of all of the features of OneNote so you can master them to organize all of your activities and communications in one central place. You will be amazed at how powerful and simple to use this application is

Microsoft 365

PowerPoint Fundamentals - Create Engaging Presentations

In this course you will learn how to create presentations that look professional and clearly deliver your message to your audience. You will benefit from a step-by-step guide for building a presentation, including understanding the PowerPoint interface. We will also dive into topics such as using themes and layouts; adding graphics, photos and other objects to engage the viewer; and tips & tricks for delivering your PowerPoint presentation.

PowerPoint Advance - Take Presentation from Good to Great

Learn how to leverage the more advanced features of PowerPoint to take your presentations to the next level. You'll create more effective presentations with a multitude of advanced features. We will cover slide transitions and animations, embedding audio and video content, how to leverage the full capability of SmartArt to make your presentations pop, how to customize the master layouts to visually improve your presentation by creating a standard custom look. Once your presentation is complete, John will take you through advanced slideshow presentation techniques. Be prepared to wow your audiences!

Simplify Outlook Meeting Scheduling with Office 365 Bookings

If you are tired of playing email and phone tag to schedule meetings, this presentation will show you how to set up the Bookings app to streamline your appointment management.

Synchronize Files to the Cloud with OneDrive and SharePoint

Have your cake and eat it too when you need to have files available on your local device but want to enjoy all the benefits of cloud-based file storage. This presentation will explain and demonstrate how to set up the OneDrive synch app.

Using Microsoft Teams to Host Virtual Meetings Online

If you have a Microsoft Office 365 subscription, you should be using Teams for all your meetings. This presentation will explain and demonstrate every feature available to host and participate in Teams meetings.

Microsoft 365

Engagement Management with the Microsoft 365 Planner Ap

Are you using Excel to keep track of progress and task completion for your engagements? Or, are you using a sophisticated engagement management app that takes too much time to keep your task completion progress up to date? Worst of all, are you relying primarily on email communications to keep track of your engagement progress? If any of these scenarios apply to your practice, this course will show you a better way to manage engagements. This app is effective for sole practitioners and firms of all sizes.

Securing Your Data with a Password Management App

Cybersecurity protection is one of the most important responsibilities of every CPA professional to protect the confidentiality of sensitive client information. While there are many aspects of cybersecurity that need to be addressed, the biggest vulnerability to protect against is unauthorized access to your application login credentials. Once your login credentials are breached, the cybercriminal essentially has the keys to your data kingdom. John Higgins, a national leader in the CPA technology, will demonstrate the ease with which you can protect all of your login credentials with maximum security with minimal expense. You will leave this course prepared to deploy this state-of-the-art security tool in your organization.

Higgins Advisory Features

- **Courses are available in 50-, 100-, 150- and 200 minute sessions**
- **Conference break out sessions, panel discussion and stand alone events**
- **All courses can be presented Live In-Person or Virtual**
- **Combine any courses to create a customized day of CPE!**

Elevate Your Potential

Microsoft 365 Deployment

Is your organization struggling to make the most of Microsoft 365? You're not alone. Many businesses adopt Microsoft 365 but fail to utilize its full suite of capabilities. That's where our Microsoft 365 Deployment Coaching Services come in. We empower you to harness the diverse functionalities that Microsoft 365 offers, transforming the way your team collaborates, communicates, and accomplishes tasks.

One-on-one Skills Coaching

Invest in your growth and proficiency with our Skills Coaching services. Whether you're looking to enhance your professional expertise or develop personal skills, our coaching program is tailored to meet your unique needs. A one-on-one dedicated coach can provide personalized guidance, support and feedback to enhance your capabilities. Equip yourself to thrive in the digital landscape and stay ahead of the curve.

Strategic Technology Planning

Strategic technology planning for a CPA firm should be an ongoing process that adapts to changes in technology and the profession. Regularly review and update your technology strategy to ensure it aligns with your firm's goals and the evolving needs of your clients and the accounting profession. Our expertise in accounting, finance and tax service enables us to help you through the digital transformation process from start to finish.

About Higgins Advisory, LLC

John is the founder and CEO of Higgins Advisory, LLC, established with the mission of helping CPAs, CFOs and other financial professionals to successfully guide their firms and business organizations through a successful digital transformation. John believes that the key to success today, and in the future, lies in leveraging the power of emerging technologies such as artificial intelligence, blockchain technology, data analytics, workflow automation and more.

John is a seasoned entrepreneur with experience, founding two separate accounting technology advisory firms that were acquired by larger organizations. In addition, he has experience with a local CPA firm as well as a technology advisory practice leader partner in a national CPA firm.



As a nationally recognized thought leader, John shares his expertise as a strategic advisor and speaker on accounting technology through coaching and speaking engagements. His primary contribution to the CPA profession is his passion for helping the profession move forward through the understanding and adoption of emerging technologies.

Contact us to schedule your event!



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Endorsed and trusted by leading CPA associations, our courses are more than just learning; they are about creating a future-ready CPA.

Be part of this transformative journey!

