



A different school of thought

Executive Education



Summer/Fall 2019

execed.kpmg.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 industry, taught by KPMG leaders, industry specialists, and highly-regarded academics from prestigious universities. Our 25+ years of experience has helped countless Fortune 100 middle-market, and global companies strengthen their staff and secure their future.

Our learning and development professionals work closely with our KPMG audit, accounting, industry specialists and thought leaders to create the curriculum. To help ensure excellence and accuracy, KPMG's Audit Quality and 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 to fit your company's culture, professionals' preferences and demanding schedules: in-person, online, on-site, and mobile. Our real-time, engaging, actionable curriculum can bring substantial 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
- ATD Excellence in Practice Award, 2016
- CLO Magazine Learning Elite list, 2013–2018
- More than 1.7 million CPE credits awarded

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



Patricia

Patricia C. Maslov

Managing Director, Executive Education

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KPMG Executive Education

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A deeper dive into the details of KPMG Executive Education



For You

Public Seminars 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, CPE-eligible courses on current and emerging technical accounting topics that build skills and confidence in our ever-evolving business.

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

For Your Team

Private Seminars save on tuition, travel, and time. Our public seminars, taught at your office, can be customized to focus 100% on issues and topics that matter most to your industry and company. Exercises and examples are tailored to 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 help ensure participation and interaction. Relevance plus engagement plus actionable coursework drives people to thrive.

Custom Learning Portals seamlessly integrate with your company. We offer 250+ technical accounting and finance courses. Courses are CPE-eligible and mobile-friendly. We can also house your company's own courses. Our personalized dashboard makes it easy for managers to assign, track completion, and oversee training budgets.



Update Conferences

Learning objectives:

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.

Program fee: \$1,895

Prerequisite: None

Preparation: None

Level of knowledge: Update

Estimated CPE credits: 16 hrs

Field of study: Accounting;
Business Management &
Organization

Delivery method: Group Live,
instructor-led course

For session dates, venue
and hotel details, please visit
us at exced.kpmg.com

Updated

29th Annual Accounting & Financial Reporting Symposium

The 29th Annual Accounting & Financial Reporting Symposium is designed to help financial executives from public or private companies stay on top of this year's most important developments and get a glimpse of what's next.

The program will also focus on other important topics impacting the responsibilities of the audience.

The Symposium offers informative and interactive content to help corporate executives advance their understanding of important technical, regulatory and compliance topics. Speakers include leading executives from industry and accounting who are involved with accounting and financial reporting issues every day. They will address recent technical pronouncements and guidance from the FASB and SEC.

Agenda:

The Symposium covers important topics, issues and trends in accounting and reporting. The agenda for the Symposium may be updated as new developments occur, subject matter includes:

- Keynote address on issues impacting financial executives
- FASB and SEC current developments
- Accounting for leases
- Accounting for financial instruments
- KPMG's thought leadership on hot topics
- Breakout sessions focused on trending topics and current updates

Updated

IFRS Annual Update (2019)

Stay up to date with recent IFRS standards and current developments in regards to IASB activities—all in one day.

This annual course is essential for executives and professionals who oversee the preparation of financial information prepared on the basis of International Financial Reporting Standards (IFRS). Attendees gain a practical update on current IFRS developments, including recently issued standards, amendments to existing standards and proposed new standards.

The course also provides helpful facts, insights and advice about the top-of-mind IFRS implementation challenges companies face in 2019 and beyond.

Agenda:

The program covers hot topics, issues and trends regarding International Financial Reporting Standards (IFRS). Regularly updated throughout the year as new developments occur, sample subject matter includes:

- Overview of IASB Work Plan and Activities
- Newly issued IFRS standards and interpretations and related implementation challenges
- Amendments to existing IFRS standards

Update Conferences

Learning objectives:

Using lecture and exercises, this course will provide participants who already have an understanding of IFRS with an update around current developments relevant for the preparation of IFRS financial information in 2019 and beyond.

Program fee: \$1,295

Prerequisite: Knowledge of/ experience with IFRS

Preparation: None

Level of knowledge: Update

Estimated CPE credits: 8 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

Course leaders: Partners and senior managers from KPMG's Audit Quality and Professional Practice group

For session dates, venue and hotel details, please visit us at [execed.kpmg.com](https://www.execed.kpmg.com)

Update Conferences

Learning objectives:

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.

Program fee: \$1,795

Prerequisite: Basic knowledge of U.S. GAAP

Preparation: None

Level of knowledge: Update

Estimated CPE credits: 16 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

Course leaders: GAAP Dynamics, a training firm that provides tailored and engaging learning solutions to companies and accounting firms worldwide. Their passion for making accounting understandable and their extensive industry knowledge combine to create a uniquely effective learning experience. They make accounting fun!

For session dates, venue and hotel details, please visit us at exceed.kpmg.com

The Essential GAAP Update (2019)

The regulatory landscape is constantly evolving, and your knowledge must be, too.

This two-day program is among the best ways for financial accounting professionals to stay up to speed on emerging developments from the FASB, SEC and other regulators. An interactive classroom experience helps participants walk away with knowledge of the new guidance as well as strategies for issues impacting implementation.

The program covers details of recent and proposed guidance, explores important issues impacting implementation, and presents strategies for applying new accounting and reporting standards in various types of companies.

Agenda:

The program covers hot topics as well as issues and trends in accounting and reporting. Regularly updated throughout the year as new developments occur, sample subject matter includes:

- A series of scenario-based practice issues highlighting accounting and reporting issues resulting from recent economic trends and events
- Reminders about standards becoming effective in 2019
- A look ahead to standards becoming effective in 2020 and beyond
- Spotlights on practice issues and implementation issues resulting from the recently issued “Big 3” standards: revenue from contracts with customers, financial instruments, and leases
- Insights on current accounting and reporting issues as identified by regulators, including SEC and PCAOB

The Essential GAAP Update for Banks and Other Financial Institutions (2019)

Banks and other financial institutions often follow special accounting rules not applicable to other companies.

This seminar helps professionals responsible for accounting and reporting at banks and other financial institutions gain a thorough understanding of the specific accounting issues in their industry.

The one-day seminar provides an in-depth update of recent developments impacting the financial services industry, including new and proposed regulatory guidance. Through class exercises and illustrative examples, participants are able to assess the impact of standard setter and regulator activities and projects on their own institutions.

Agenda:

The program covers hot topics, issues and trends in accounting and reporting for banks and other financial institutions. Regularly updated throughout the year as new developments occur, sample subject matter includes:

- Current banking practice and application issues (including implementation issues surrounding revenue recognition and the discontinuation of LIBOR)
- Standards generally effective in 2019, including:
 - Hedge accounting
 - Leases
 - Premium amortization on purchased callable debt
- Standards generally effective in 2020 and beyond, including:
 - Credit losses under the new CECL (current expected credit loss) model
 - Other ASUs and FASB projects generally effective in 2020 and beyond

Update Conferences

Learning objectives:

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 banks and other financial institutions.

Program fee: \$1,295

Prerequisite: None

Preparation: None

Level of knowledge: Update

Estimated CPE credits: 8 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

Course leaders: GAAP Dynamics, a training firm that provides tailored and engaging learning solutions to companies and accounting firms worldwide. Their passion for making accounting understandable and their extensive industry knowledge combine to create a uniquely effective learning experience. They make accounting fun!

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Technical Accounting

Learning objectives:

Per the Joint FASB/IASB revenue recognition standard: determine appropriate revenue recognition decisions and increase awareness of revenue recognition developments in the profession—specifically the activities of the FASB, SEC and the IASB.

Program fee: \$1,395

Prerequisite: Knowledge of basic accounting

Preparation: None

Level of knowledge: Intermediate

Estimated CPE credits: 8 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

Course leaders: GAAP Dynamics, a training firm that provides tailored and engaging learning solutions to companies and accounting firms worldwide. Their passion for making accounting understandable and their extensive industry knowledge combine to create a uniquely effective learning experience. They make accounting fun!

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Updated

Revenue Recognition Fundamentals

ASC Topic 606/IFRS 15, *Revenue from Contracts with Customers*, has significantly impacted many companies upon adoption.

A single 5-step model for all transactions and all industries! Whether you report under U.S. GAAP or IFRS, this one-day course, provides you with the necessary information to gain a fundamental understanding of how and when revenue is to be recognized. Discussion-based scenarios and other group activities highlight significant challenges and application issues requiring consideration by companies applying the standard.

Agenda:

- Overview of the new standard
 - Core principle and 5-step model
 - Scope
 - Effective dates
 - Industry impacts
- Walkthrough of the 5-step model
 - Step 1: Identify the contract with a customer
 - Step 2: Identify the performance obligations in the contract
 - Step 3: Determine the transaction price
 - Step 4: Allocate the transaction price to the performance obligations in the contract
 - Step 5: Recognize revenue when (or as) the entity satisfies a performance obligation
- Other issues and considerations
 - Contract modifications
 - Material rights
 - Principal vs. agent considerations
 - Contract costs
 - Licensing arrangements
 - And more...
- Disclosures
 - Learning from initial adopters
 - Disclosure requirements, including nonpublic entity elections

New Lease Accounting

The new U.S. GAAP lease accounting standards fundamentally change the rules that govern accounting and reporting for almost all leases, including property, plant and equipment leases.

This two-day seminar will cover major areas of change from the prior leasing standard, and explain the new standard, its logic, its implications, and the problem areas that concern the constituents. Participants will gain an understanding of the complexities of the new standard as well as how to apply it effectively in their own organizations.

Agenda:

Four types of accounting for contractual commitments for property, plant, and equipment:

- Commitments that stay off the balance sheet
 - Contracts that are not leases
 - Short-term contracts
- Commitments that are on the balance sheet
 - Operating leases
 - Finance leases
- Lessor accounting
 - Interaction with revenue recognition rules
 - Elimination of the distinction between real estate leases and other leases
 - Elimination of leveraged leases
- Detailed topics
 - Allocating consideration to lease and nonlease components
 - Lease payments
 - Discount rate
 - Lease term
 - Impairments of right of use asset
 - Modifications
 - Subleases
 - Sale-leaseback accounting
 - Build-to-suit leases
 - Real estate leases
 - Policy elections
 - Effective date and transition approach
 - Disclosures

Technical Accounting

Learning objectives:

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

Program fee: \$1,895

Prerequisite: None

Preparation: None

Level of knowledge:
Intermediate

Estimated CPE credits: 16 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

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

For session dates, venue and hotel details, please visit us at exceed.kpmg.com

Technical Accounting

Learning objectives:

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.

Program fee: \$1,895

Prerequisite: Knowledge of basic accounting

Preparation: None

Level of knowledge:
Intermediate

Estimated CPE credits: 16 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

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

For session dates, venue and hotel details, please visit us at [execed.kpmg.com](https://www.execed.kpmg.com)

Accounting for Income Taxes

Today's complex business environment has made accounting for income taxes more complex as well.

This two-day seminar is designed to help participants understand and apply the income tax accounting guidance in ASC 740. Relevant aspects of the recent tax reform will be discussed throughout the seminar.

The first day introduces a conceptual foundation of accounting for income taxes. It explains how to reconcile differences between four sets of flows: cash flows, GAAP income, taxable income, and more likely than not, taxable income. The second day moves to more complex concepts, such as valuation allowances, accounting for tax contingencies and interim tax allocations. It also covers specific topics such as business combinations, foreign operations, and compensation.

This intermediate seminar is offered in addition to our *Advanced Accounting for Income Taxes* seminar, which assumes you have mastered the topics in this seminar. Read the course descriptions for both seminars to choose which is best suited to your needs.

Agenda:

- Permanent vs. taxable and deductible temporary differences and how they affect the effective tax rate
- Difference between taxes payable (refundable), tax contingencies, deferred tax liabilities (assets), and tax disclosures
- Taxes and other comprehensive income
- Tax credit carryforwards and tax loss carryforwards
- Common sources of permanent and temporary differences
- Valuation allowance for deferred taxes
- An introduction to tax contingencies
- Interim period taxes for quarterly reporting
- Deferred taxes and business combinations, share-based compensation, and foreign operations

Advanced Accounting for Income Taxes

Accounting for income taxes poses many challenges, even for professionals with strong knowledge of the tax code and the relevant accounting requirements.

This two-day seminar looks beyond the fundamentals of ASC 740, the FASB standard for accounting for income taxes, to examine some of the major implementation challenges that arise in applying the standard. Covering complex areas such as quarterly calculations, intra-entity transactions and equity investments, participants come away with an in-depth understanding of how to account for income taxes—even in unusual circumstances. The seminar has been updated and will cover the Tax Cuts and Jobs Act (TCJA).

This advanced seminar assumes participants have mastered the topics covered in our foundational program, *Accounting for Income Taxes*. Read the course descriptions for both seminars to choose which is best suited to your needs.

Agenda:

The course explains the challenges that arise in the implementation of accounting for income taxes in the following areas:

- Tax contingencies for permanent as well as temporary differences, accrual of interest and penalties
- Valuation allowances
- Quarterly calculations, including discrete items
- Intraperiod tax allocations
- Business combinations
- Share-based compensation
- Foreign operations
- Intra-entity transactions
- Equity investments and joint ventures
- Other comprehensive income

Technical Accounting

Learning objectives:

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

Program fee: \$1,995

Prerequisite: 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: Group Live, instructor-led course

Course leaders: 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 dates, venue and hotel details, please visit us at execed.kpmg.com

Technical Accounting

Learning objectives:

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.

Program fee: \$2,795

Prerequisite: Knowledge of basic accounting

Preparation: None

Level of knowledge:
Intermediate

Estimated CPE credits: 24 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

Course leaders: Partners and senior managers from KPMG's Audit Quality and Professional Practice Group

For session dates, venue and hotel details, please visit us at [exced.kpmg.com](https://www.exced.kpmg.com)

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

This intensive, three-day course is designed for financial executives of U.S. subsidiaries of foreign companies, U.S. companies accessing foreign capital markets, those with international investors, or any other company reporting under IFRS.

The course content provides in-depth, practical knowledge about the preparation of financial statements in compliance with IFRS, key differences between U.S. GAAP and IFRS, and a variety of challenges involving transitioning to and adopting IFRS. Participants are also provided an overview in regard to the impact on non-accounting areas, such as systems, processes and controls. In addition, this course covers the new IFRS standards for revenue recognition, financial instruments, and leasing and compares them respectively with the related U.S. GAAP requirements.

Agenda:

- General IFRS
- IFRS framework
- IFRS in the United States
- Financial instruments
- Share-based payments
- Derivatives and hedge accounting
- Pensions and post-retirement benefits
- Income taxes
- Derecognition/transfers of financial instruments
- Intangible assets
- Property, plant, and equipment & discontinued operations
- Revenue recognition
- Provisions, contingent liabilities, and contingent assets
- Leases
- Debt vs. equity classification
- Inventory
- Investment property
- Consolidation, equity method investees, joint ventures
- Impairment of long-lived assets
- Business combinations and noncontrolling interests
- Subsequent events/ events after the reporting period
- IFRS 1
- Financial instrument disclosures
- Presentation of financial statements
- Statement of cash flows
- Conversion to IFRS

Fair Value for Accountants

Fair value is in the spotlight, and fair value accounting has never been more important. Despite such attention by standard setters and regulators, estimating fair value of an asset or liability can still be extremely complex and uncertain.

This one-day seminar provides accounting and reporting professionals with an in-depth understanding of the requirements of ASC Topic 820, the FASB standard for fair value measurement. Through class exercises and illustrative examples, participants will study the fundamental principles of fair value, the key assumptions and methodologies used to estimate fair value, and typical practice issues highlighted by regulators. Participants will come away better able to apply fair value principles in their accounting and reporting activities.

Agenda:

Although the course is updated as developments occur, topics are expected to include:

- Fair value measurement
 - Scope of ASC Topic 820
 - Utilization in U.S. GAAP
 - Recent emphasis on fair value measurements
 - Definition of fair value
- Valuation methodologies
 - Market, income and costs approaches
 - Common valuation methods
- Fair value of financial assets
 - Equity securities, debt securities, derivative financial instruments, other alternative investments
 - Various issues—blockage discounts, restricted securities, bid ask spread, transaction costs, credit risk/liquidity risk
- Using NAV
 - Fair value for alternative investments
 - FV vs. NAV
- Fair value of nonfinancial assets
 - Highest and best use of a nonfinancial asset, valuation approaches, key assumptions used to determine fair value
- Fair value of liabilities
 - Valuation approaches
 - Consideration of non-performance risk
 - Changes in FV due to credit risk for liabilities
- Financial statement presentation
 - Measuring FV on a “net basis” of assets/liabilities
 - Fair value hierarchy
 - Other disclosure requirements
 - Example disclosures

Technical Accounting

Learning objectives:

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.

Program fee: \$1,395

Prerequisite: None

Preparation: None

Level of knowledge: Basic

Estimated CPE credits: 8 hrs

Field of Study: Accounting

Delivery method: Group Live, instructor-led course

Course leaders: GAAP Dynamics, a training firm that provides tailored and engaging learning solutions to companies and accounting firms worldwide. Their passion for making accounting understandable and their extensive industry knowledge combine to create a uniquely effective learning experience. They make accounting fun!

For session dates, venue and hotel details, please visit us at execed.kpmg.com

Technical Accounting

Learning objectives:

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.

Program fee: \$1,895

Prerequisite: Baseline understanding of U.S. GAAP accounting

Preparation: None

Level of knowledge:
Intermediate

Estimated CPE credits: 16 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

Course leaders: Partners and directors from KPMG's Advisory practice

For session dates, venue and hotel details, please visit us at exced.kpmg.com

Derivatives and Hedging Foundations for Accountants

Derivatives and hedging can be an important part of any company's investment and risk management strategy. But understanding and accounting for derivatives and hedging has been challenging.

Recently, the FASB has made targeted improvements to hedge accounting (ASU 2017-12), and as a result the opportunities for using hedge accounting have increased and the difficulties have decreased. The revised rules create an opportunity for you to re-think your approach to the use of derivatives and hedge accounting.

Our new course, developed and delivered by some of KPMG's leading derivatives and hedging professionals, provides a thorough introduction to both the business and accounting sides of derivatives and hedging. This two-day seminar offers accounting and treasury professionals practical instruction to apply derivative and hedge accounting guidance relevant to calculating earnings, OCI allocations, reclassifications and disclosure amounts, with a strong focus on the updated hedging standards, including transition requirements.

We start with an overview of plain vanilla derivative products like futures, forwards, options and swaps, including how these contracts work and the associated accounting treatments. You will learn about broad derivative market categories, including interest rates, commodities, and currencies. We'll give you opportunities to practice your new skills with hands-on case studies and class discussions. For those already using hedge accounting, we'll cover the differences between current GAAP for derivatives and hedging transactions and the new revisions, and round out your knowledge with differences between IFRS and U.S. GAAP.

Agenda:

- Introduction to derivatives
- ASC Topic 815 (FAS 133)
- Alternative accounting treatments
- ASU 2017-12 updates
- Interest rate swap case study
- Documentation requirements
- Disclosures
- Review of FAS 52 issues
- Foreign currency hedging
- Commodity hedging
- Interest rate hedging
- Recent developments under U.S. GAAP and IFRS
- Other related topics

Accounting for Business Combinations

For a business combination to succeed, organizations have to get the accounting right.

This two-day seminar covers the ins and outs of ASC Topic 805, the FASB standard for business combinations. With in-depth, example-based content on the requirements of the standard, the underlying concepts, the potential impact on the structuring of mergers and acquisitions, the deferred income tax consequences, and post-acquisition accounting, participants will gain the practical knowledge necessary to effectively apply the standard when a business combination occurs.

The seminar also covers ASC Subtopics 350-20 and 350-30, which relate to the accounting for goodwill and intangible assets subsequent to an acquisition.

Agenda:

- Overview of ASC 805 (FAS 141R and FAS 160) with simple examples
- Introduction to tax issues relating to business combinations
- Detailed requirements of ASC 805
- Computing the cost of acquiring the target
- Contingent consideration and share-based awards
- Allocating the acquisition cost to the acquired asset and assumed liabilities
- Understanding ASC 350-20 and ASC 350-30 (FAS 142) related to goodwill
- Accounting for noncontrolling interests (ASC 810)
- Taxable transactions and tax-deductible goodwill

Technical Accounting

Learning objectives:

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.

Program fee: \$1,895

Prerequisite: Baseline understanding of U.S. GAAP accounting

Preparation: None

Level of knowledge: Intermediate

Estimated CPE credits: 16 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

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

For session dates, venue and hotel details, please visit us at execed.kpmg.com

Technical Accounting

Learning objectives:

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.

Program fee: \$1,395

Prerequisite: Baseline understanding of U.S. GAAP accounting

Preparation: None

Level of knowledge:
Intermediate

Estimated CPE credits: 8 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

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

For session dates, venue and hotel details, please visit us at exced.kpmg.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.

This seminar informs accounting professionals about the complex requirements of the standard and updates them on the latest relevant accounting bulletins.

Using the KPMG Guide to Implementation of ASC 718 (FAS 123R) as a roadmap, this seminar also assists participants in applying the expense in their own organizations, so they can maintain compliance.

Essential insights on valuing, expensing, disclosing and reporting different types of share-based payments help attendees come away with practical, need-to-know guidance, whatever their company's unique situation.

Agenda:

- Implementation issues to show the logic of ASC 718
- Correct implementation procedures
- Non-qualified stock options
- Incentive stock options (ISOs)
- Unvested stock with and without 83(b) elections
- Employee stock purchase plans (ESPPS)
- Non-vested stock; incentive stock options
- Measurement of fair value
- Classification of awards
- Recognition of compensation costs
- Modification of awards
- Business combinations
- Disclosures
- Earnings per share

Accounting for Foreign Operations

Multinational companies face the challenging task of consolidating and reporting their foreign operations.

This seminar provides financial accounting professionals of multinational businesses with in-depth knowledge about the requirements of the accounting rules related to foreign currency transactions and foreign subsidiary consolidations. It also provides critical insights into practical issues businesses with an international presence face in implementing the rules. Participants will come away better prepared to manage the complexities of all aspects of accounting for foreign operations.

Agenda:

- Foreign currency transactions
- Determining the functional currency
- Translations under the current rate method
- Remeasurements under the temporal method
- Inter-company transactions and consolidations
- Statement of cash flows and foreign operations
- Accounting for foreign taxes using ASC 740-30

Technical Accounting

Learning objectives:

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.

Program fee: \$1,395

Prerequisite: A laptop with Excel 2007 or above is required to build models; 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: Group Live, instructor-led course

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

For session dates, venue and hotel details, please visit us at execed.kpmg.com

Technical Accounting

Learning objectives:

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.

Program fee: \$1,395

Prerequisite: Baseline understanding of U.S. GAAP accounting

Preparation: None

Level of knowledge:
Intermediate

Estimated CPE credits: 8 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

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

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Statement of Cash Flows

Preparing a cash flow statement is an essential accounting skill, but that doesn't mean it's always straightforward.

This one-day seminar is designed to help accounting and reporting professionals prepare the statement of cash flows per U.S. GAAP, even when special circumstances complicate the calculations. Using examples from published financial statements to illustrate scenarios and their applications, the course will explain how to incorporate non-operating changes in assets and liabilities due to factors such as acquisitions, dispositions, foreign currency translations, other comprehensive income and share-based payments.

Agenda:

- ASC Topic 230: Financing, Investing, and Operating Cash Flows: Detailed discussion of FAS 95 requirements
- Classifying cash flows
- Examples of SEC comment letters
- When the balance sheet changes differ from cash flow adjustments
- Special issues: deferred taxes and stock options: deferred taxes
- Stock-based compensation
- Miscellaneous cash flow topics: Pensions and other post-employment benefits
- Significant noncash events
- Leases
- Premium and discount bonds
- Equity investments
- Derivatives and hedging
- Securitizations
- Vendor financing
- Discontinued operations

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SEC Reporting and MD&A

Learning objectives:

Provide a basic understanding of how to prepare the SEC's periodic reporting forms for banks and bank holding companies: 10-K annual report, 10-Q quarterly report, 8-K current report, as well as an understanding of how to comply with the annual proxy requirements for banks.

Program fee: \$1,295

Prerequisite: None

Preparation: None

Level of knowledge: Basic

Estimated CPE credits: 8 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

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

Ms. Busse is accompanied by a KPMG banking partner.

For session dates, venue and hotel details, please visit us at exceed.kpmg.com

Bank MD&A Disclosures Workshop

Publicly reporting banks are increasingly focused on the quality of Management's Discussion and Analysis (MD&A) disclosures in SEC filings.

Designed specifically for those preparing SEC filings for banks and bank holding companies, this seminar emphasizes key MD&A developments, including SEC guidance on non-GAAP disclosures, the SEC Disclosure Effectiveness Project, SEC releases, comment letters, speeches, and disclosure best practices with a focus on expanding and improving the effectiveness and compliance of MD&As.

Example bank holding company MD&As and hands-on exercises involving actual MD&A disclosures are incorporated throughout the seminar. The exercises provide participants a real-world opportunity to evaluate and critique MD&A disclosures, and discuss how they might be improved and applied to their own bank's MD&A disclosures.

Agenda:

- Overview of management's discussion and analysis requirements
- Review and analysis of underlying MD&A releases
- Critical accounting policies and estimates
- Analysis of example MD&As on key topical issues
- Goodwill considerations
- Cash flow disclosures
- Impairment testing disclosures
- Non-U.S. GAAP financial measure disclosures
- Common practices in drafting guidance
- Required trend disclosure
- Forward-looking information
- Trends in SEC comments

Bank SEC Reporting & Compliance

Financial professionals of public banks and bank holding companies face their own set of unique challenges.

This seminar provides a sound grounding in SEC reporting and compliance for financial professionals of banks and bank holding companies.

Emphasizing bank-specific periodic financial statement requirements, it gives participants practical, hands-on experience preparing annual reports, quarterly reports, current reports, and proxy statements—even as the regulatory requirements change. Course materials are continuously updated to give timely perspectives on current issues on the SEC's agenda, including non-GAAP disclosures, the Disclosure Effectiveness Project, Dodd-Frank initiatives, the JOBS Act, SEC guidance on the adoption of new accounting policies, trends in SEC comments, and XBRL SEC guidance on the adoption of new accounting policies and trends in SEC comments. Actual bank SEC filings are integrated into the course to demonstrate how the regulations are implemented in practice, and all participants receive an SEC Rules and Regulations Manual.

Agenda:

- The SEC, its operations, and organization
- Dealing effectively with SEC staff
- XBRL
- SEC reporting using IFRS
- Developing the Form 10-K annual report
- Form 10-Q quarterly report
- The item requirements of Form 10-K, including Industry Guide 3 and Article 9 of Regulation S-X
- Form 8-K current report
- Proxy statements

SEC Reporting and MD&A

Learning objectives:

Provide a basic understanding of how to prepare the SEC's periodic reporting forms for banks and bank holding companies: 10-K annual report, 10-Q quarterly report, 8-K current report, as well as an understanding of how to comply with the annual proxy requirements for banks.

Program fee: \$1,795

Prerequisite: None

Preparation: None

Level of knowledge: Basic

Estimated CPE credits: 16 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

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

Ms. Busse is accompanied by a KPMG banking partner.

For session dates, venue and hotel details, please visit us at execed.kpmg.com

SEC Reporting and MD&A

Learning objectives:

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.

Program fee: \$1,295

Prerequisite: None

Preparation: None

Level of knowledge: Basic

Estimated CPE credits: 8 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

Course leaders: 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 dates, venue and hotel details, please visit us at exced.kpmg.com

MD&A Disclosures Workshop

Public companies are increasingly focused on the quality of Management's Discussion and Analysis (MD&A) disclosures in SEC filings.

This seminar emphasizes key MD&A developments, including SEC guidance on non-GAAP disclosures, the SEC Disclosure Effectiveness Project, SEC releases, comment letters, speeches, and disclosure best practices with a focus on expanding and improving the effectiveness and compliance of MD&As.

Example MD&As and hands-on exercises involving actual MD&A disclosures are incorporated throughout the seminar. The exercises provide participants a real-world opportunity to evaluate and critique MD&A disclosures and discuss how they might be improved and applied to their own MD&A disclosures.

Agenda:

- Overview of management's discussion and analysis requirements
- Review and analysis of underlying MD&A releases
- Critical accounting policies and estimates
- Analysis of example MD&As on key topical issues
- Goodwill considerations
- Cash flow disclosures
- Impairment testing disclosures
- Non-U.S. GAAP financial measure disclosures
- Common practices in drafting guidance
- Required trend disclosure
- Forward-looking information
- Trends in SEC comments

SEC Reporting & Compliance

Public company financial accounting and reporting professionals face their own set of unique challenges.

This seminar provides a sound grounding in SEC reporting and compliance for financial professionals at public companies or companies planning an IPO. It gives participants practical, hands-on experience preparing annual reports, quarterly reports, current reports, and the proxy statements in compliance with the SEC—even as the regulatory requirements change. Course materials are continuously updated to give timely perspectives on current issues on the SEC's agenda, such as non-GAAP disclosures, the Disclosure Effectiveness Project, Dodd-Frank initiatives, the JOBS Act, SEC guidance on the adoption of new account policies and trends in SEC comments. Actual SEC filings are integrated into the course to demonstrate how the regulations are implemented in practice, and all participants receive an SEC Rules and Regulations Manual.

The recent SEC amendments to simplify and update disclosure requirements will also be addressed during this two-day seminar.

Agenda:

- The SEC, its operations, and organization
- Non-U.S. GAAP financial measures
- Dealing effectively with SEC staff
- Developing the Form 10-K annual report
- Item by item analysis of Form 10-K requirements
- Preparing the Form 10-Q quarterly report
- Current reporting on Form 8-K
- Proxy statement and annual report to shareholders
- Current hot issues including trends in SEC comments, XBRL, and SEC reporting using IFRS

SEC Reporting and MD&A

Learning objectives:

Provide participants a basic understanding of how to prepare 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.

Program fee: \$1,795

Prerequisite: None

Preparation: None

Level of knowledge: Basic

Estimated CPE credits: 16 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

Course leaders: 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 dates, venue and hotel details, please visit us at execed.kpmg.com

SEC Reporting and MD&A

Learning objectives:

Provide a more advanced understanding of the current financial statement presentation issues and complex areas affecting Form 10-K annual reports.

Program fee: \$1,295

Prerequisite: Baseline understanding of Form 10-K

Preparation: None

Level of knowledge:
Intermediate

Estimated CPE credits: 8 hrs

Field of study: Accounting

Delivery method: Group Live, instructor-led course

Course leaders: 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 dates, venue and hotel details, please visit us at exced.kpmg.com

Advanced 10-K Workshop

Given the level of detail required and the potential level of scrutiny by the SEC, the SEC's Form 10-K Annual Report requires top-notch skill to prepare.


This one-day seminar, designed for professionals with experience in SEC reporting, builds participant knowledge of Form 10-K requirements and relevant regulations, including Regulation S-X, Regulation S-K, and the Securities Exchange Act of 1934. Participants gain advanced understanding of more complex reporting scenarios, focusing on the most effective preparation of the 10-K.

The seminar will also cover the latest issues facing reporting entities, including non-GAAP Financial Measures, the SEC Disclosure Effectiveness Project, benchmarking and Disclosure Committee best practices.

This advanced seminar assumes you have mastered the topics covered in our foundational program, *SEC Reporting & Compliance*. Read the course descriptions for both seminars to choose which is best suited to your needs.

Agenda:

- SEC reporting (10-K, planning, preparation, and timing)
- Selected financial data considerations
- MD&A considerations
- Financial statement considerations
- Business, risk factors and executive compensation considerations
- Disclosure trend considerations
- SEC comment letter trends and hot topics



"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*

"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*

Finance & Business Management

Learning objectives:

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

Program fee: \$1,295

Prerequisite: A laptop with Excel 2010 or above is required. We will be using Excel 2016 in the seminar.

A strong working knowledge of Excel, including commonly used keyboard shortcuts and functions, is required. Knowledge of Excel VBA is not necessary.

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: Group Live, instructor-led course

Course leaders:

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

For session dates, venue and hotel details, please visit us at exced.kpmg.com

Optimizing Accounting & Finance with Advanced Excel

This seminar will show you how to harness the full power of Excel to become a more effective and efficient user.

The seminar covers advanced material taught by an instructor with extensive accounting and finance experience. All examples are therefore tailored to accounting and finance.

Agenda:

- Build common accounting and finance schedules efficiently using transpose and shift aspects of Excel
- Automate and condense schedules using SUMPRODUCT and ARRAY functions
- Make schedules flexible to incorporate multiple scenarios using LOOKUP and OFFSET functions
- Collect and select user data through use of formatting, Data Validation, Spinners, List Boxes, Sliders, INDEX, MATCH, OFFSET, and INDIRECT functions
- Perform “what if” analysis using DATA TABLES and PIVOT TABLES
- Design more efficient spreadsheets using effective planning and various Excel features
- Stress testing the future cash flows using SOLVER and GOAL SEEK

Please note that we will not be covering Excel VBA or Excel charting features except the building of charts whose scales adjust automatically as the input data changes.

Seminar materials include:

The seminar materials will include over 50 detailed spreadsheets illustrating the concepts coupled with documents and videos explaining various aspects of Excel.

Modeling & Projecting Financial Statements

Financial statements can deliver a ton of insights, if you know how to uncover them.

This two-day workshop helps professionals in valuation, corporate finance, planning and budgeting, investment banking, asset management, fixed income research, and equity research weave business and financial forecasts into spreadsheet-based projections of financial statements. These projections help professionals value a business, test future scenarios, and gain a cohesive view of a business.

The workshop will also discuss tools and techniques to make participants more efficient and effective in developing models and analyzing information.

Agenda:

- Introduction to modeling and design: components of a financial statement model; skills needed for modeling; Excel overview; design choices
- Efficient modeling
- Building blocks of models and step-wise development: enterprise activities
- Building blocks: financing activities
- Overview of integrated models and their drivers
- Valuation

Course prerequisites:

- You **MUST BRING A LAPTOP** with Excel 2010 or above to the session to build models.
- Please consider taking the one-day *Optimizing Accounting & Finance with Advanced Excel* seminar that precedes this course. Modeling & Projecting Financial Statements assumes that you have mastery of Excel skills covered in that course.
- Knowledge of Excel VBA is **NOT** required.
- A good knowledge of accounting topics such as indirect cash flows, leases, taxes, and options

Seminar materials include:

- Over 50 detailed spreadsheets illustrating the application of modeling concepts
- A 250-page manual describing the underlying concepts and their applications

Finance & Business Management

Learning objectives:

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

Program fee: \$1,795

Prerequisite: Baseline understanding of U.S. GAAP accounting.

A laptop with Excel 2010 or above is required.

A strong working knowledge of Excel is required.

Preparation: None

Level of knowledge: Intermediate

Estimated CPE credits: 16 hrs

Field of study: Finance

Delivery method: Group Live, instructor-led course

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

For session dates, venue and hotel details, please visit us at **execed.kpmg.com**

Finance & Business Management

Learning objectives:

Provide an understanding of The 4 Disciplines of Execution and how to apply 4DX to your organization.

Program fee: \$1,195

Prerequisite: None

Preparation: None

Level of knowledge:
Intermediate

Estimated CPE credits: 8 hrs

Field of study: Personal Development

Delivery method: Group Live, instructor-led course

Course leaders:

Franklin Covey, world leaders in consulting and training, enabling individuals and organizations to achieve results that require lasting changes in human behavior

For session dates, venue and hotel details, please visit us at exced.kpmg.com

The 4 Disciplines of Execution Workshop

At KPMG, we consistently achieve business outcomes for our own firm, and we help clients to do the same by driving projects, plans and initiatives to successful completion. We are keenly aware that disciplined execution is key to that success.

Franklin Covey's The 4 Disciplines of Execution (4DX) formula has inspired our leaders, and we believe the KPMG Executive Education community can create a similar culture by utilizing *The 4 Disciplines of Execution*, and we are pleased to introduce a work session to help you do so.

Did your team's or organization's most recent business strategy end with a loud crash, or did it die out slowly over time? What happened?

The "whirlwind" of today's urgent activities devoured the time and energy you wanted to dedicate to executing tomorrow's strategy. *The 4 Disciplines of Execution*[®] can change that reality forever. This one-day Quick Start focuses on how your team or organization can use The 4 Disciplines of Execution to achieve extraordinary results despite a 100-mph whirlwind.

The 4 Disciplines of Execution (4DX) is a simple, repeatable, and tested formula for executing on your most important strategic priorities. 4DX is not theory, but rather a set of practices that have been tested and refined by hundreds of organizations and thousands of teams over many years. You will learn:

- Why great strategies stall and eventually fail
- How to avoid this failure by narrowing your focus
- What a lead measure of success really is
- How to set up a players' scoreboard
- How to establish a cadence of accountability

Are you ready for the impact 4DX could have on your organization?

Agenda:

- Choosing the right Wildly Important Goal
- Understanding how to choose predictive leading behaviors and measure them to accomplish the goal
- Setting up a Team Scoreboard to increase engagement
- Establishing a weekly Cadence of Accountability
- How to implement 4DX with a team

Mastering Acquisitions and Buyouts

Completing an acquisition or buyout might be the most high-stakes challenge facing any business leader. This seminar provides owners and executives tasked with making tough deals happen with the practical insights they need to plan, negotiate and close a transaction.

Featuring a host of experienced program speakers who have spent their careers on the frontlines of major deals, participants hear real-world perspectives about what successful deal making looks like, through every stage of the process. They participate in a small-group “acquisition team” case study of a real-world business combination. During the case, they evaluate an acquisition target, price and structure a deal, formulate a negotiating approach and compare results with what actually took place.

The principles shared in the seminar apply to companies facing almost any acquisition scenario, and the curriculum is regularly updated to reflect the ever-changing world of deals.

Agenda:

- Today’s deal marketplace
- Structuring the deal: The tax side
- Getting ready: How the sellers (should!) prepare
- Valuing the target, making the bid, and setting the price
- Special case: Buyouts
- Negotiating tips
- Structuring the deal: The legal side
- Harvesting the upside: Business integration
- Due diligence: When, how and how much
- The merger simulator case study—putting it all together

Finance & Business Management

Learning objectives:

Provide an understanding of what’s required to complete a successful merger, acquisition or buyout.

Program fee: \$1,895

Prerequisite: None

Preparation: None

Level of knowledge: Basic

Estimated CPE credits: 16 hrs

Field of study: Finance; Taxes; Business Law; Business Management & Organization; Personal Development

Delivery method: Group Live, instructor-led course

Course leaders: Steve Blum, former managing director of a New York securities firm and currently a senior director of Strategic Initiatives at Yale Alumni

Mr. Blum is accompanied by a host of KPMG professionals and specialists from law and M&A firms.

For session dates, venue and hotel details, please visit us at execed.kpmg.com

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Finance & Business Management

Learning objectives:

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.

Program fee: \$1,095

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: Group Live, instructor-led course

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 dates, venue and hotel details, please visit us at exceed.kpmg.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 one-day 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 when standing in front of a large group, and while seated 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

New

Foundations for Building a Trusted Data & Analytics Strategy

In a global environment defined by constant disruption, business leaders need data and analytics they can trust to inform their most important decisions.

With so much riding on the output of data and analytics, questions emerge about the trust we place in the data as well as the analytics and the controls that underwrite a new way of decision making. Educating business leaders is the first step in recognizing the possibilities of data and analytics and establishing a trusted data and analytics strategy should soon follow.

This one-day course provides the foundation for leveraging data and analytics to explore what is possible by turning the classroom into an experience for the participants, and conveying what data and analytics can do for their organization. Attendees will extract insights through “design thinking,” incubate ideas, and get a practical understanding of how data and analytics can be used to solve their most challenging operational problems.

Agenda:

- Understanding the basics of data and analytics
- Establishing a trusted enterprise data strategy
- Reviewing conceptual analytics scenarios
- Achieving your analytics target operating model

Finance & Business Management

Learning objectives:

Provide an understanding of the use of data and analytics and how to turn it into actionable insights to manage strategic business priorities.

Program fee: \$1,395

Prerequisite: Laptop is required for this course

Preparation: None

Level of knowledge: Basic

Estimated CPE credits: 8 hrs

Field of study: Business Management & Organization

Delivery method: Group Live, instructor-led course

Course leaders:

Partners/Principals, directors, and data scientists from KPMG’s Data & Analytics (D&A) team

For session dates, venue and hotel details, please visit us at [execed.kpmg.com](https://www.execed.kpmg.com)

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.

Steve Blum is Senior Director of Strategic Initiatives for Yale University's Alumni Association. Prior to this role, Steve was Chief Operating Officer at Burnham Securities, Inc. in New York. Steve has provided merger and acquisition, partnering/alliance, corporate finance and valuation advice to hundreds of publicly and privately held domestic and global companies. For 20 years, Steve was a KPMG partner who helped establish the firm's Valuation practice. Steve holds a bachelor's degree in economics from Yale University and a master's degree from New York University's Stern Business School. He has taught and written on merger and acquisition topics, and is also a CPA and Accredited Senior Appraiser. (*Mastering Acquisitions and Buyouts*)

Mary Anne Busse is a nationally recognized expert 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. (*Advanced 10-K Workshop, Bank MD&A Disclosures Workshop, Bank SEC Reporting & Compliance, MD&A Disclosures Workshop, SEC Reporting & Compliance*)

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*)

Facilitators of Franklin Covey, world leaders

in consulting and training, enabling individuals and organizations to achieve results that require lasting changes in human behavior. (*The 4 Disciplines of Execution 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, New Lease Accounting, Statement of Cash Flows*)

Partners of GAAP Dynamics, a training firm that provides tailored and engaging learning solutions to companies and accounting firms worldwide. Their passion for making accounting understandable and their extensive industry knowledge combine to create a uniquely effective learning experience. They make accounting fun! (*Fair Value for Accountants, Revenue Recognition Fundamentals, The Essential GAAP Update, The Essential GAAP Update for Banks and Other Financial Institutions*)

To register

Online: execed.kpmg.com

The fees indicated for each course cover all learning materials, instruction, and food and beverages.

Discounts are available for early registrations or combination purchases, groups, or KPMG alumni.

Please contact KPMG Executive Education at 201-505-6062 or us-kpmglearning@kpmg.com for more information.
If paying by check, please make checks payable to KPMG LLP—Executive Education.

Attend Any 2 Executive Education Courses Per Person and Save!*

Apply coupon code COMBO300 at checkout to receive \$300 off the combined purchase price.

Register Early and Save!*

Reserve your seat in any session before midnight on October 15, 2019, and apply coupon code FALL19CATALOG at checkout to receive \$150 off the purchase price.

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

Cancellation policy

Please contact the KPMG Executive Education registrar at us-kpmglearning@kpmg.com or 201-505-6062 to cancel your public seminar registration. Participants that have registered for a KPMG Executive Education course who notify the registrar more than 10 full business days before a session may receive a full credit towards a future program, or a refund of their tuition less a \$195 administrative service charge per course.

Registrants canceling between 10 full business days and 4 full business days of the program start date should contact the KPMG Executive Education registrar at 201-505-6062 to receive a held tuition credit. Held tuition credits will expire one year from the start date of the program originally canceled and can be used by the original registrant or another member of their company to attend an Executive Education course being held at any time before such expiration date.

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

Your tax deduction. Training taken to maintain or improve professional skills is usually tax-deductible. Consult with your tax adviser for applicability.

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

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registration.