

About the CPE Forum

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

Online Learning

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

https://us02web.zoom.us/webinar/register/WN_B4Pi2-1HSD2cscbBTLVXLw

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

RETAIN THAT CONFIRMATION EMAIL. IT WILL HAVE THE SECURITY LINK TO ATTEND THE ENTIRE SERIES. USE THE SAME LINK EACH WEEK WITH NO NEED TO RE-REGISTER.

General Information

Each session qualifies for 3 hours of Continuing Professional Education credits, except for the November 24th session which qualifies for 4 credits. The sessions meet on Tuesdays from 3:00 until 6:00, except for November 24th which begins at 2:00 to offer 4 hours of CPE. The cost of attending all or any part of the six-week series is \$100.00.

Write check payable to: CPE Forum
Mail check: Josephine Sarnelli, CPA
14 Mill Street
Westfield, MA 01085



CPE Forum

Fall 2026

Online Educational Programs



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

November 3, 2026

Preventing Fraud

David Thibault, First Vice President,
Institutional Banking, Country Bank
dthibault@countrybank.com

Payment fraud remains a serious concern for organizations. The 2025 AFP Survey found that 76% of organizations experienced attempted or actual payment fraud during the year. Education is an important part of protecting you and your organization. To help you stay informed and prepared, Country Bank invites you to attend a fraud-prevention webinar presented by NEACH™

November 10, 2026

Taking Advantage of New Hampshire Tax Laws

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

The New Hampshire Uniform Trust Code and New Hampshire law offers clients some unique advantages. These include an unlimited rule against perpetuities, directed trustee provisions, and no state income tax. In this course, we will examine how to take advantage of the New Hampshire laws, and the details of how these advantages can be employed for your clients.

November 17, 2026

Immigration Compliance in the Workplace

Kayla Snider, Esq.
Associate Attorney
Skoler, Abbott & Presser, P.C.;
ksnider@skoler-abbott.com

Stay current on evolving immigration compliance requirements and enforcement priorities affecting employers. This seminar will cover EAD and Form I-9 compliance, government audits and inquiries, and practical steps for responding to an ICE workplace visit.

November 24, 2026

Annual Tax Update (4 Hours)

Deb Rogers, CPA deb@rg-cpa.net

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

December 1, 2026

Massachusetts Paid Family & Medical Leave (PFML): How to Stay Compliant

Attorney Meaghan Murphy
Skoler, Abbott & Press, P.C.
mmurphy@skoler-abbott.com

PFML requirements continue to impact employers across the Commonwealth. Attorney Meaghan Murphy will discuss employer responsibilities and compliance requirements, practical guidance for managing PFML leaves, how to handle suspected abuse or fraud, and lessons from the \$4.75 million Wayfair jury verdict. Whether you're new to PFML or looking to enhance your knowledge, this seminar will provide valuable insights to help you confidently navigate this complex leave law.

December 8, 2026

Fundamentals of Bankruptcy

Michael A. Deere, Esq.
Shatz, Schwartz and Fentin
mdeere@ssfpc.com

Bankruptcy filings are on the rise, and both individuals and small businesses are facing serious financial challenges in the current economic environment. Is bankruptcy the solution? This program offers a practical guide to bankruptcy, addressing the factors that lead to bankruptcy, the short and long-term effects, and the basics every financial professional should know when advising clients. It will discuss the different chapters of bankruptcy, filing limits and requirements, and what it takes to receive a final discharge.