



Small Business Start-Up Certificate Program

Help New Small Business
Clients Thrive

Is your firm prepared to confidently guide small business clients?



Checkpoint Learning® Small Business Start-Up Certificate Program



If you're not working with small businesses or haven't fully educated yourself on them, you're missing out. There are 28.8 million small businesses in the United States, accounting for 56.8 million of the country's employees. Small businesses (fewer than 500 employees) account

for 99.7% of all business in the U.S.* That is a major business opportunity that your firm can't afford to miss.

The costs and complexity of government regulations often hit small and independent businesses the hardest. Because of this, small businesses are asking CPAs to do more than just bookkeeping and tax preparation. These additional requests create an opportunity for you to provide clients with information and advice on small business-specific issues, particularly the critical decisions involved in the start-up stage. You need to be ready to guide small businesses and provide them with consulting services tailored to their unique needs.

With the Checkpoint Learning Small Business Start-Up Certificate Program from Thomson Reuters, you can expand your skills, gain key knowledge and learn best practices for providing your current and future clients with small business consulting services.

The curriculum covers the basic concepts of providing small business advice and consulting — including writing a business plan, entity comparisons, financing options for small businesses, fraud prevention, mobile applications for sales and taxes and working with Quickbooks and reporting client data. You'll gain the expertise and tools needed to assist clients pursuing new opportunities.

Components

The full program is comprised of eight interactive online courses that provide a detailed overview of start-up considerations plus a comprehensive web-based final exam to test understanding of core concepts.

Duration

The program can be completed in as little as one week or at your own speed for up to a year.

Small Business Start-Up Certificate

Those who successfully complete the program will earn a Checkpoint Learning Small Business Start-Up Competency Certificate. Certificate holders can add this accomplishment to their resume or LinkedIn® profile.

CPE Credits

The Small Business Start-Up Certificate Program provides learners with the opportunity to earn up to 39 Continuing Professional Education credits.

*U.S. Small Business Administration; 2016

Small Business Start-Up Certificate Program

This certificate program consists of eight interactive online courses (1 – 9 CPE credits each) covering small business start-up guidance in detail. It includes a comprehensive final exam to test comprehension. Both the courses and the final exam are delivered via the Checkpoint Learning platform.

Online Courses

- **Advising and Consulting to the Small Business** (9 CPE credits) introduces you to the basic concepts of providing small business advice, consultations and engagements. It includes methods for identifying appropriate consulting services, effective principles and techniques for developing and conducting small business consulting engagements and the pros and cons of working with closely held and/or family businesses in a small business consulting engagement.
- **How to Start a Business** (8 CPE credits) helps you gain the tools that you need to start a business or successfully advise individuals who are starting a business. Advising small-business owners can be very satisfying if you get to watch one of these businesses grow and flourish, thanks in part to your own help. It can also be the beginning of a long-term relationship and result in tax, consulting and other work in future years. The skills and knowledge you develop in advising new business owners can also be transferred to profitable consulting engagements for established businesses.
- **How to Write a Business Plan** (6 CPE credits) covers all aspects of developing business plans. Thorough attention is given to sales revenue, production, research and development, marketing and distribution and sales administration. The program also examines writing financial plans and implementing business plans.
- **Entity Comparisons** (3 CPE credits) presents and explains the various types of entities available for conducting business, including LLCs and LLPs. It explains how these entities are created and operate. It further explains the entities' and owners' potential legal liabilities. Tax reporting requirements at the entity and owner levels for the different entities are also explained.
- **Financing Options for Businesses** (3 CPE credits) explores how starting a new business or expanding an existing business requires money and an understanding of the risks associated with each financing option. This course reviews some of the basic methods of financing a fledgling business and expansion of an existing business. It also offers some tips on finding grant funds for nonprofit ventures.
- **Fraud 101 – A Basic Prevention Guide for Small Businesses** (4 CPE credits) focuses on the basic elements of fraud, evaluating risks and discussing ways to implement the processes, procedures and controls needed to mitigate such risks. Now more than ever, it is critical to understand the accounting standards by which financial statements are to be prepared and the auditing and other attest standards that CPAs follow in providing assurance on those financial statements.
- **Accounting Apps for Your Business** (1 CPE credit) discusses the various choices you have regarding accounting apps for your business including the pros and cons of each app and the features of these applications.
- **QuickBooks – Working With and Reporting Client Data** (5 CPE credits) walks the learner through some fundamental aspects of QuickBooks. The topics covered include an overview of working with the client's QuickBooks data, including using the accountant's report and the impact of the client working with different versions of QuickBooks than the practitioner. The course then walks the learner through the tools available for analyzing and adjusting financial data in QuickBooks and preparing financial statements. Finally, the course helps the practitioner learn to customize financial statements using QuickBooks data.

Final Exam

The program includes a comprehensive, web-based final exam to test understanding of core concepts. Note: each individual course concludes with an exam for CPE credit.

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Thomson Reuters Checkpoint Learning®

Checkpoint Learning provides training and continuing professional education (CPE) solutions for tax, accounting and finance professionals and firms. From customized group training to more than 900 individual webinar, online self-study and public seminar and conference events, Checkpoint Learning offers a full range of solutions to build learning plans for both individuals and teams. Our mission is to improve the productivity and profitability of accounting, tax and corporate finance professionals by rethinking traditional processes, leveraging cutting-edge technology and providing the most accurate and insightful training available.

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