



CHECKPOINT LEARNING

INDIVIDUAL AND ADMINISTRATOR TOOLS TO TRACK CPE AND MANAGE LEARNING

800.231.1860
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TAX & ACCOUNTING



THOMSON REUTERS™

CHECKPOINT LEARNING

YOUR PERSONALIZED CPE DASHBOARD AND LEARNING MANAGEMENT SOLUTION.

Checkpoint Learning—the winner of Accounting Today's Top New Learning Product for 2010 (total platform) and for 2011 (Competency Model)!

Checkpoint Learning provides CPE compliance tracking, learning management, curriculum development and much more. You can purchase and complete courses directly from Checkpoint Learning, either individually or as part of a subscription package. Packages are customizable, allowing you to take the reins in assembling course bundles that include only the courses your firm requires to meet its needs and budget. Select from hundreds of online and downloadable courses on accounting, auditing, tax, ethics, management, Yellow Book, and staff training topics—all fully redesigned to enhance your learning experience.

BENEFITS

- **Total learning management**—designed for tax and accounting professionals
- A library of more than 350 upgraded, **interactive online courses** from MicroMash and PASS Online. Quality CPE from right where you are, whenever you're ready.
- More than 40 **state-specific ethics courses**
- More than 110 **self-study courses** based on PPC Guides provide **instant results** with online grading on the content you use every day
- New video-based online courses provide an **alternative to words on a page**
- Webinars provide **up-to-the minute information** on industry hot topics
- Live seminars taught by **renowned experts** are available at a significant discount
- Conferences at resort locations allow you to **network while you learn**. Plus, you'll save a bundle on registration!
- **CPE tracking and compliance monitoring** for every state board of accountancy requirement, as well as more than 20 professional designations
- CPE **certificate storage** and automated **integration of CPE records** with our CPE compliance engine
- **Learning plans** to help meet training and career advancement goals for each employee
- Personalized learning dashboard with **all of your CPE records and courses in one place**
- Flexible pricing—**purchase only what you need**
- **Subscription packages available to save BIG** on your total CPE needs! Three options are available for learners, plus a Corporate Curriculum bundle available for corporate professionals. See details on page 6.

CONNECTIONS

Checkpoint: Link directly to related Checkpoint research as you're engaged in online learning! Customers of both systems will find links—on key topic pages within Checkpoint and inside of Checkpoint Learning online courses—that tie research material to courses by topic.

ONESOURCE®: Access Checkpoint Learning from your ONESOURCE dashboard! Checkpoint Learning/ONESOURCE Integration allows dual users to search for CPE courses, view in-progress online courses, and view the status report manager showing CPE compliance and status.

TRY CHECKPOINT LEARNING

for yourself and learn why thousands of practitioners moved to Checkpoint Learning in 2011!

Contact us today to discuss your training needs and begin building a learning plan that's right for you!



HEAR FROM YOUR PEERS

"The Thomson Reuters Checkpoint Learning product won me over because of its cost efficiency, the good variety of courses, the concise answers to Estate and Trust situations, and the fact that Checkpoint Learning allows me to use my time more efficiently."

—John McPhee

"The staff at Thomson Reuters took the advice of their customers and made a great product. I have a list of things I like about the new Checkpoint Learning system, but my favorite has to be the attachment feature for external certificates. This has helped us to become more organized while saving time (and expense) by keeping all CPE history in one location."

—Tamara Carr-Granstrom

"I have started using Checkpoint Learning...The courses are convenient to me and attractively priced, and I like the integration between the courses and the reporting."

—S. Hardister

"My PASS Online Ethics course on Checkpoint Learning was user-friendly and fun, and I would highly recommend it!"

—Matt Shonsey

"Thank you for recommending the Checkpoint Learning Premier CPE Package. I have been using it frequently the last two months. I am very pleased to discover the courses are meaningful and useful. The "self-study" courses are very substantial, and the "live webinar" courses are very enjoyable and loaded with content. I appreciate not having to travel (in or out of town) spending extra money and time."

—Ian H. Edwards

"Being in public accounting, it is difficult to find the time to attend many live seminars, therefore I use self-study formats whenever possible. Checkpoint Learning by far is the best. I no longer have to track what courses I have taken and when I took them. It is all done for me through Checkpoint Learning. If I need to access my course completion certificates, all I need to do is sign on to my online account and there it is under the Activity History tab. Convenient and easy to use."

—Teresa Kerbe

ENJOY SIGNIFICANT SAVINGS—
See the Checkpoint Learning
subscription options on page 6.



CHECKPOINT LEARNING MANAGEMENT

FEATURING REQUIRED TOOLS

Checkpoint Learning integrates the best of the many tools and features first seen in Required to manage all facets of learning for accounting and financial professionals. The Required tools within Checkpoint Learning provide a comprehensive learning management and CPE tracking experience, incorporating:

- Compliance management, including complete tracking of state-to-state regulations and requirements
- Guidance for administering in-house learning
- Customizable, individual learning paths for employees, and tools to measure course completion

Checkpoint Learning is the most comprehensive mandatory continuing education compliance management system available—and specifically designed for accounting and financial professionals

In short, our learning management system (LMS) includes the most comprehensive mandatory continuing education compliance management system ever created. Checkpoint Learning was developed with accounting firms in mind; thus, implementation is immediate and effortless.

COMPLETE CPE TRACKING AND COMPLIANCE MANAGEMENT

Checkpoint Learning manages continuing education compliance, including:

- Determining compliance periods and managing simultaneous compliance periods
- Tracking all credit categories, including prorated credit requirements
- Enforcing limits on CPE format types
- Calculating carryover credit
- Managing adjustments for reporting period extensions
- Tracking special requirements for new licensees

In addition, our staff ensures the accuracy of Checkpoint Learning through monthly rule updates that are automatically integrated into the tracking system.

In addition to the jurisdictions shown in the box at right, your firm can even create an in-firm CPE requirement to track minimum education requirements established by firm management or mandated by peer review standards. Checkpoint Learning also maintains complete and updated rule summaries for every regulator it tracks on its Resource page so administrators can easily answer employees' questions about continuing education compliance. Learning administrators are provided with an administrative view into all firm personnel records so CPE compliance can be quickly confirmed. Checkpoint Learning can be configured to send employees regular email reminders informing them of their continuing education status.

CPE RULES TRACKING FOR:

- Every state in the United States (including Puerto Rico)
- Yellow Book
- IRS Enrolled Agents
- AICPA members
- CMA, CFP, CTEC, and CIA
- More than a dozen additional tax and accounting affiliations

BEST VALUE!

CPE Tracking accounts for independent professionals are included with the NEW Checkpoint Learning CPE Packages; see page 6.



MANAGING YOUR IN-HOUSE SEMINARS

Required learning management tools, within the Checkpoint Learning platform, guide firms through the process of offering and administering in-house learning opportunities. While robust enough for any type of learning event, our learning management system (LMS) is uniquely suited for CPE-accredited courses. Employees will value the simplicity of searching, registering for and, where applicable, launching classes through the intuitive learner interface. Administrators will value the time-saving tools for each aspect of in-house education.

SELF-SERVICE COURSE REGISTRATION

Learners can browse the university course calendar and register for courses, or register for courses directly from email invitations. Registrants receive email confirmation with downloadable appointments that are ready for import into personal calendar software like Outlook and Lotus Notes.

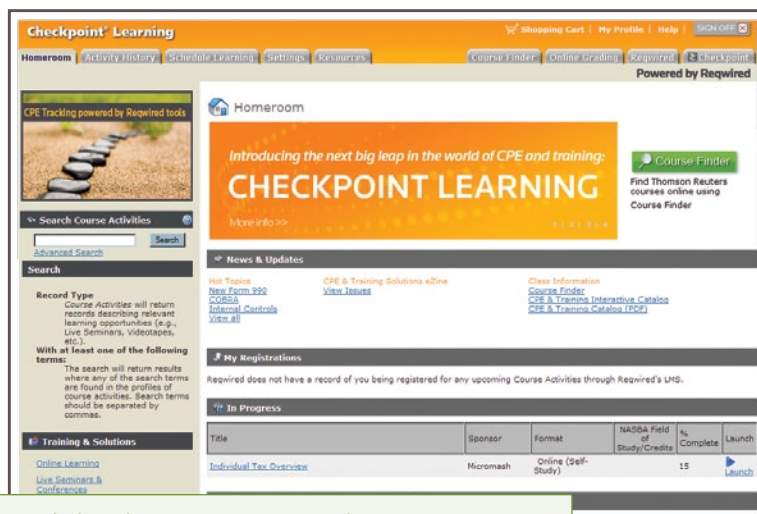
Other features include:

- Registration caps and waitlists
- Preformatted and customizable sign-in sheets
- Post-course evaluations
- Electronic attendance certificates
- Name tags and name tents
- Course material storage

BEYOND CPE COMPLIANCE

Professional development is more than counting CPE credits. Leading firms design specific learning paths to give employees the tools necessary for success in each phase of their careers. Our learning path module provides firms the framework to:

- Set clear learning expectations for their employees and
- Analyze firm-wide progress with professional development goals.



Professional development is more than counting CPE credits. Leading firms design targeted learning curricula to give employees the skills necessary for success in every phase of their careers.

LEARNING PLAN TEMPLATES

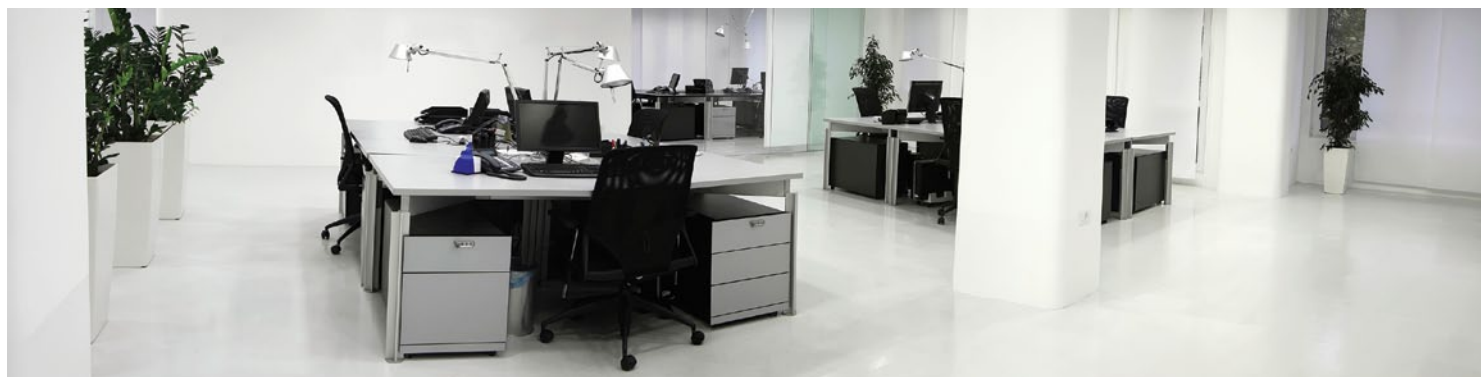
Checkpoint Learning's LMS allows firms to design various learning plans to match levels within the organization and/or competencies they want employees to achieve. Professional development managers can assign one or more path templates to each employee, indicating target dates for course completion and whether particular learning is mandatory or optional. Firms can further use this system to:

- Customize learning plans for individuals and
- Generate firm-wide reports to measure the degree to which employees are meeting learning expectations.

SPECIAL FEATURES

COACH ACCOUNTS

Checkpoint Learning can provide team leaders with direct access to their team members' CPE information, learning plans, and course registrations. A team leader, a.k.a. "coach," can receive email updates on his/her team's CPE compliance progress, adjust a team member's training plan as needed, and receive email notifications when team members register for courses. Coach accounts are a great way to empower team leaders to actively supervise their teams' learning.



CHECKPOINT LEARNING SUBSCRIPTIONS

PREMIER CPE PACKAGE

Take a look at how this industry-changing approach to learning can save you time and money, and help keep you at the top of your game with the knowledge and skills you need to serve your clients. Truly the jewel in the crown, the Premier CPE Package provides an unprecedented range of learning options at significant savings! Includes the following, for a low annual per-user price.

- **ONLINE COURSES.** Standard PLUS media-enhanced titles: 350+ courses (2,200+ CPE credits) from MicroMash and PASS Online
- **LEARNING MANAGEMENT.** Online CPE Tracking and Compliance Monitoring for every state board of accountancy requirement, and more than 20 professional designations, including EA and CFP
- **SELF-STUDY COURSES.** Unlimited Online Grading for 110+ PPC Self-Study Courses (840+ CPE credits)
- **WEBINARS.** Unlimited One- to Four-Hour Webinars: ever-changing list of industry topics
- **LIVE SEMINARS & CONFERENCES.** Live Learning Annual Discounts on 24 hours total per subscription year: 40% off Gear Up self-sponsored Seminars and Conferences*; and 25% off AuditWatch Seminars! (Gear Up self-sponsored seminars and conferences currently take place in: AL, CA, FL, GA, IL, IN, IA, MA, MO, NV, NY, NC, ND, OK, OR, VT, and VA.)

PROFESSIONAL AND COMPLIANCE CPE PACKAGES

The Professional CPE Package is perfect for professionals who desire to meet their mandatory CPE requirement in the most affordable way, including state-specific ethics requirements. It provides 310+ online courses (1,700+ CPE credits) including a full library of 40+ online ethics courses, plus CPE tracking and compliance monitoring.

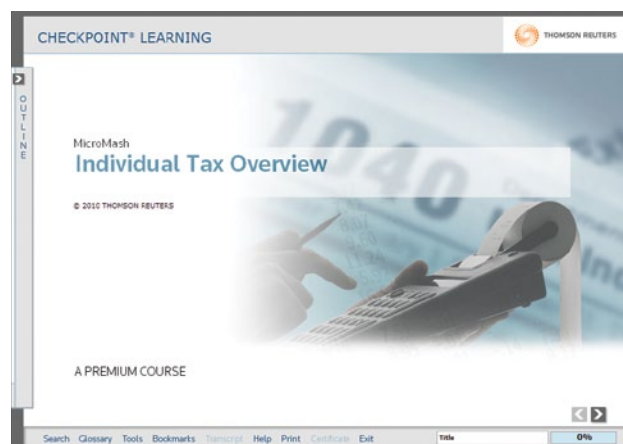
The Compliance CPE Package provides 250+ online courses (over 1,500 CPE credits) plus CPE tracking and compliance monitoring.

CORPORATE PACKAGE

The continuing professional education needs of corporate CFOs, Controllers, and Accountants are not always the same as those of the Public Accountant, but continuing education and training is just as important to your success. The Checkpoint Learning Corporate Curriculum is designed to provide Corporate Accountants with courses that address their specific training and continuing professional education needs. From the CFO and Treasurer to the Accounting Manager and Staff Accountant, courses are available to help you do your job better.

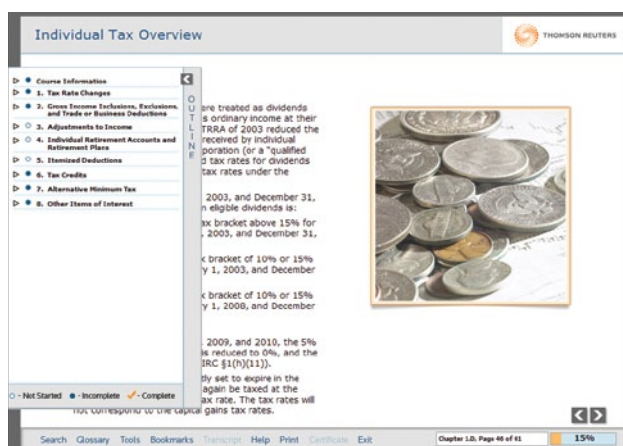
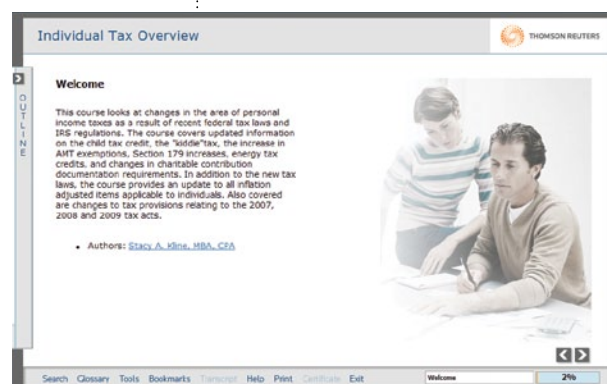
Whether you need core training for your staff or just a refresher on a particular topic, Checkpoint Learning has you covered! With more than 120 course offerings covering 9 fields of study and providing more than 500 hours of CPE credit, the new Checkpoint Learning Corporate Curriculum is your comprehensive online learning portal.

SAMPLE COURSE INTERFACE



Checkpoint Learning courses are designed with a sleek new look and a bigger screen size than legacy MicroMash and PASS Online systems.

Courses are created by leading industry experts.



New open screen design features fold-away menu and bottom-mounted toolbar to maximize learning space.

Contact us today to discuss your training needs and begin building a learning plan that's right for you!

CHECKPOINT LEARNING COMPETENCY MODEL

A COMPREHENSIVE MODEL FOR ASSESSING, IMPROVING, AND CONNECTING YOUR CPE TO TAX & ACCOUNTING SPECIALTIES, SKILLS, AND CAREER LEVELS!



Checkpoint Learning Competency Model Wins Top New Learning Product for 2011!

A competency model is a descriptive tool that displays the skills needed to perform a specific role in a job, organization, or profession. It prepares people for success by understanding what proficiencies are needed to not just complete the job but excel!

The Checkpoint Learning Competency Model provides: a database of competencies for 4 career levels—staff, senior, manager, and director—across five areas of technical specialty and 14 non-technical categories; a self-assessment that allows managers to review and add comments; report writing capabilities; and customizing capabilities to add competencies and categories as well as map proprietary courses and just-in-time activities. The Checkpoint Learning Competency Model provides the foundation for setting learning goals and plans, discussing performance management issues, and planning career strategies.

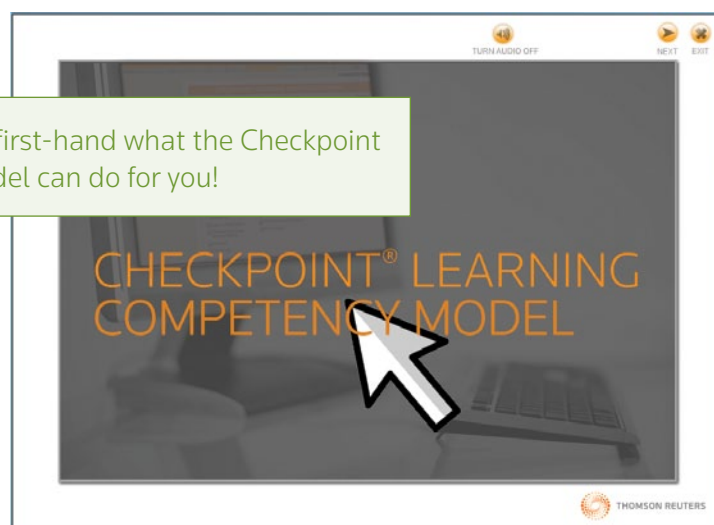
TECHNICAL SPECIALTIES:

- Corporate accounting
- External audit
- Financial management
- Internal audit
- Tax

NON-TECHNICAL CATEGORIES:

- Business analysis and interpretation
- Client service
- Communication
- Ethics
- Industry and global perspective
- Leadership
- Legal and regulatory
- Management
- Problem solving and decision making
- Professional development
- Research
- Risk analysis
- Technology

Watch the demo, and see first-hand what the Checkpoint Learning Competency Model can do for you!



Designed specifically for tax and accounting professionals, the Checkpoint Learning Competency Model helps conscientious learners make wise decisions with their CPE time and budget. And firms with employees or contractors across national borders can ensure that skill sets and body of knowledge are consistent across offices and countries.

ADDITIONAL FEATURES:

- Presents knowledge, skills and abilities that professionals must master to be proficient on the job.
- Learners can view or print competencies in their own specialty area or other areas or categories.
- Suggestions and examples are available for users who need assistance writing competencies.
- An easy-to-use self-assessment allows learners to quickly measure their own strengths and areas in need of further development.
- Competencies are linked to Thomson Reuters courses and learning activities.

BENEFITS:

- Professionals can track competencies throughout their careers.
- Learners are directed to specific learning events, Thomson Reuters' courses, or firms' proprietary courses or learning events to gain knowledge and insights.
- Users have a new and consistent way of assessing tax, accounting, and audit professionals across their office or practice area.
- The Competency Model provides a common language for partners and their extended management team to use in talking about the firm's capabilities and the quality of their work.
- The Competency Model improves the firm's quality control processes by linking areas requiring quality improvement to specific competencies.

PRICING AND SUBSCRIPTIONS:

The new Competency Model toolset has several annual subscription options. For more information and a quote on these, as well as a number of additional options and variables, call a Checkpoint Learning sales representatives at 800.231.1860.

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INTEGRATED ONLINE LEARNING MANAGEMENT AND CPE TRACKING FROM CHECKPOINT LEARNING

Available with complete access to cutting-edge courses from MicroMash and PASS Online

We bring you the topics you need in the format and learning style of your choice!

- Practical guidance on the most significant challenges facing professionals today
- Need-to-know information and breaking developments
- Helpful options and support to maintain your certification requirements with ease

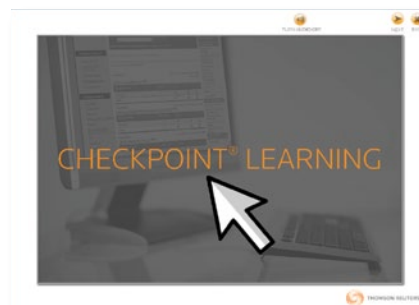
Only we provide the current, relevant course content you need in a multitude of formats that are both convenient and affordable. We offer more than 900 courses on accounting, auditing, tax, management, Yellow Book, staff training, and more. These high-quality courses are available in a wide spectrum of media: seminars, conferences, on-site training, online learning, webinars, and self-study in print or electronic formats.

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Take a tour of Checkpoint Learning and see more of our enhanced course features! Select "Demo" to view the animated product demonstration at:

cl.thomsonreuters.com/intro



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