



CALLING OUR CPA FRIENDS!

Save Premium and Earn CE Credit!

Our friends at BridgePoint Risk Management are offering CPAs access to CPAGold's Loss Prevention Program



CPAGold™ welcomes members and friends to the on-line loss control education website. This self-study course is based on the expertise of Robert L. Picardi, Esq., CPA, of the law firm of Lapping & Picardi, the manager of the CPAGold™ loss control hotline. Successful completion of this course secures for current policyholders a discount of up to 7.5% of the annual CPAGold™ premium for up to three years. The course provides an overview of the sources and causes of malpractice claims, their legal basis and relatively simple and effective loss mitigation strategies.

After completing this course you will be able to recall, identify and/or determine:

Our Friends at BridgePoint Risk Management Offers Accountants Access to CPAGold’s Loss Prevention Program to Help Earn CE Credits and Save on its Premium!

As you know, TDC Life prides itself on delivering its clients and partners opportunities to make their family and business life better. Today, we are proud to let you know our friends at BridgePoint Risk Management recently partnered with CPAGold™ to offer clients access to its on-line loss control education website. Based on the work of Ralph Picardi, Esq., CPA, of the law firm of Lapping & Picardi, this interactive self-study course offers member firms the opportunity to earn continuing education hours and earn significant premium credit savings.

This course provides an overview of the sources and causes of malpractice claims, their legal basis and relatively simple and effective loss mitigation techniques.

Participants will gain a better understanding of why malpractice claims occur and how steps can be taken to either remove or reduce the risk.

This interactive educational program is aimed at CPA’s and other accounting and consulting professionals with a basic or intermediate knowledge of malpractice issues. No advance preparation is required.

The course is divided into twelve separate modules. Each module is followed by a multiple choice quiz. A pass level of 70% is required to complete the module and move to the next section. Upon successful completion of all twelve modules, a certificate of completion will be issued.

The Modules are:

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| 1. Liability Protection And The Form Of Your Firm | 7. Fee Collection |
| 2. Engagement Letters | 8. File Retention For Accountants |
| 3. Sarbanes Oxley | 9. Liability To Third Parties |
| 4. Detecting Fraud, Theft And Other Illegal Acts | 10. Alternative Dispute Resolution |
| 5. Protecting Client Confidentiality | 11. Defending Against The Culpable Claimant |
| 6. Rejecting Or Withdrawing From Client Engagements | 12. Claim Reporting |

BridgePoint is providing its CPA clients the ultimate win-win through exclusive access to continuing education for loss control and mitigation

12 Free Hours Continuing Education

Participants are eligible to receive 12 free hours of continuing education. Upon completion, a 7.5% premium credit will be applied for each of the next three years to your annual professional liability premium.

ADR Wording in Engagement Letters

Adopting new ADR wording in engagement letters will provide an additional 5% premium credit. Sample wording would be provided.

If you are interested in learning more about this program, please reach out to either Jerry Nelson or Brian Schwarzkopf today. They can help you take advantage of this exclusive program.



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