



February 2026

▶ Software & Tools of the Profession

Course Catalogue

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Software & Tools of the Profession

Course Title	Modality	PD Hours
Certificate in Microsoft Copilot Tools & Techniques for CPAs (Instructor Led)	Certificate & Executive Programs	12 PD Hours
Creating Data Presentations for Finance Professionals Course Bundle	On Demand Bundle	13.5 PD Hours
Microsoft Office 2021 for Students Bundle	On Demand Bundle	16 PD Hours
Microsoft Power BI Bundle (AICPA)	On Demand Bundle	28 PD Hours
Business Intelligence (BI) Principles and Practice by TDWI	On Demand (eLearning)	8 PD Hours
Data Modeling by TDWI	On Demand (eLearning)	8 PD Hours
Data Storytelling for Business Impact by TDWI	On Demand (eLearning)	2.5 PD Hours
Data Visualization Fundamentals by TDWI	On Demand (eLearning)	8 PD Hours
Google Docs	On Demand (eLearning)	4 PD Hours
Microsoft OneNote 2016	On Demand (eLearning)	4 PD Hours
Microsoft Outlook 2019: Basic	On Demand (eLearning)	4 PD Hours

Software & Tools of the Profession (cont.)

Course Title	Modality	PD Hours
Microsoft Outlook 2019: Intermediate	On Demand (eLearning)	4 PD Hours
Microsoft Power BI: Create Visuals in Power BI to Successfully Analyze Data (AICPA)	On Demand (eLearning)	5 PD Hours
Microsoft Power BI: Get Started with Power BI (AICPA)	On Demand (eLearning)	2.5 PD Hours
Microsoft Power BI: Go Beyond Pivot Tables with Power Pivot (AICPA)	On Demand (eLearning)	4 PD Hours
Microsoft Power BI: Leverage PowerBI.com to Create Data Analysis for Others (AICPA)	On Demand (eLearning)	2.5 PD Hours
Microsoft Power BI: Use Advanced Calculations with DAX Formulas (AICPA)	On Demand (eLearning)	4 PD Hours
Microsoft Power BI: Use Power Query to Transform Your Data (AICPA)	On Demand (eLearning)	2 PD Hours
Microsoft PowerPoint 2016: Basic	On Demand (eLearning)	4 PD Hours
Microsoft PowerPoint 2016: Intermediate	On Demand (eLearning)	4 PD Hours
Microsoft PowerPoint 2019: Intermediate	On Demand (eLearning)	4 PD Hours

Software & Tools of the Profession (cont.)

Course Title	Modality	PD Hours
Microsoft Project 2016	On Demand (eLearning)	4 PD Hours
Microsoft SharePoint 2016	On Demand (eLearning)	4 PD Hours
Microsoft Teams	On Demand (eLearning)	4 PD Hours
Microsoft Word 2016: Basic	On Demand (eLearning)	4 PD Hours
Microsoft Word 2016: Intermediate	On Demand (eLearning)	4 PD Hours
Microsoft Word 2016: Advanced	On Demand (eLearning)	4 PD Hours
Microsoft Word 2019: Basic	On Demand (eLearning)	4 PD Hours
Microsoft Word 2019: Intermediate	On Demand (eLearning)	4 PD Hours
Microsoft Word 2019: Advanced	On Demand (eLearning)	4 PD Hours
Microsoft Word: Business Documents	On Demand (eLearning)	2.5 PD Hours
Office 365 Essentials	On Demand (eLearning)	5 PD Hours
OneDrive for Business	On Demand (eLearning)	1 PD Hour

Software & Tools of the Profession (cont.)

Course Title	Modality	PD Hours
Power BI Fundamentals	On Demand (eLearning)	6 PD Hours
PowerPoint and Pitchbooks	On Demand (eLearning)	7.5 PD Hours
QuickBooks Online Basics	On Demand (eLearning)	4 PD Hours
The 7 Secrets to Powerful Financial Presentations	On Demand (eLearning)	2.5 PD Hours
Zoom Fundamentals	On Demand (eLearning)	2 PD Hours
Introduction to SQL for Financial Professionals	Online Seminar	8 PD Hours
Taking Another Look at Power BI	Online Seminar	2 PD Hours

Excel

Course Title	Modality	PD Hours
Certificate in Microsoft Excel and Data Analytics (Fundamentals)	On Demand Certificate	14 PD Hours
Certificate in Microsoft Excel and Data Analytics (Advanced)	On Demand Certificate	14 PD Hours
Certificate in Microsoft Excel and Data Analytics (Comprehensive)	On Demand Certificate	28 PD Hours

Excel (cont.)

Course Title	Modality	PD Hours
Data-Driven Decision Making with Excel Bundle	On Demand Bundle	9 PD Hours
Mastering Pivot Tables Bundle	On Demand Bundle	4 PD Hours
Microsoft Excel 2021 for Students Bundle	On Demand Bundle	13 PD Hours
Advanced Excel Formulas & Functions	On Demand (eLearning)	2.5 PD Hours
Advanced Excel Using AI for Accountants	On Demand (eLearning)	2 PD Hours
AI for Excel Formulas	On Demand (eLearning)	1.5 PD Hours
AI-Powered Excel Quick Wins	On Demand (eLearning)	2.5 PD Hours
Analytical Techniques with Pivot Tables	On Demand (eLearning)	2 PD Hours
Data Analysis with Excel	On Demand (eLearning)	1 PD Hour
Excel Charts for Finance Professionals with Office 365	On Demand (eLearning)	2 PD Hours
Excel Formulas for Finance	On Demand (eLearning)	3.5 PD Hours
Excel VBA for Finance	On Demand (eLearning)	7.5 PD Hours

Excel (cont.)

Course Title	Modality	PD Hours
Excel: Financial Modeling Made Easy	On Demand Bundle	1.5 PD Hours
Excel: Solve Hard Problems in Corporate Finance	On Demand Bundle	1 PD Hour
Excel: Supply Chain Analytics	On Demand Bundle	1 PD Hour
Getting Started with Pivot Tables	On Demand (eLearning)	2 PD Hours
Getting Started with Power Pivot and the Data Model	On Demand (eLearning)	2 PD Hours
Hands-On: Predictive Analytics for Everyone with Excel by TDWI	On Demand (eLearning)	8 PD Hours
Introducing Excel Data Effectively in PowerPoint	On Demand (eLearning)	2.5 PD Hours
Microsoft Access 2016: Basic	On Demand (eLearning)	4 PD Hours
Microsoft Access 2016: Intermediate	On Demand (eLearning)	4 PD Hours
Microsoft Excel 2016: Basic	On Demand (eLearning)	4 PD Hours
Microsoft Excel 2016: Intermediate	On Demand (eLearning)	4 PD Hours
Microsoft Excel 2016: Advanced	On Demand (eLearning)	4 PD Hours

Excel (cont.)

Course Title	Modality	PD Hours
Microsoft Excel 2019: Basic	On Demand (eLearning)	4 PD Hours
Microsoft Excel 2019: Intermediate	On Demand (eLearning)	4 PD Hours
Microsoft Excel 2019: Advanced	On Demand (eLearning)	4 PD Hours
Microsoft Excel 2021: Basic	On Demand (eLearning)	4 PD Hours
Microsoft Excel 2021: Intermediate	On Demand (eLearning)	5 PD Hours
Microsoft Excel 2021: Advanced	On Demand (eLearning)	5 PD Hours
Microsoft Power BI: Analyze Your Data with Excel Pivot Tables (AICPA)	On Demand (eLearning)	4 PD Hours
Microsoft Power BI: Create Excel Dashboards for Maximum Impact (AICPA)	On Demand (eLearning)	2 PD Hours
Microsoft Power BI: Prepare Your Data Efficiently for Excel Analysis (AICPA)	On Demand (eLearning)	2 PD Hours
Mining Financial Model and Valuation	On Demand (eLearning)	5 PD Hours
Scenario and Sensitivity Analysis	On Demand (eLearning)	2.5 PD Hours

Excel (cont.)

Course Title	Modality	PD Hours
Advanced Charts and Dashboards	Online Seminar	7.5 PD Hours
Advanced Excel (2026 Update)	Online Seminar	8 PD Hours
Automating Microsoft Excel with VBA	Online Seminar	8 PD Hours
Excel Accounting with R	Online Seminar	8 PD Hours
Excel and Python: A Tale of Two Power Tools	Online Seminar	8 PD Hours
Practical Excel for Finance Professionals	Online Seminar	6 PD Hours

