

## BUSINESS BOOKKEEPING

The knowledge and skills needed for those aspiring to become full-charge bookkeepers are provided in this program. Opportunities for employment are available in a variety of organizations and businesses. *Students may register for individual courses or complete the certificate program.*

### Required Courses

- CFM 38 Bookkeeping
- EDP 07 Introduction to Microcomputing  
(see page 8)
- CFM 47 Microsoft Excel 2007
- CFM 39 Computer Applications in Accounting Using QuickBooks

## ACCOUNTANT ASSISTANT

This program provides the knowledge to interpret and analyze financial statements. Upon completion, students will be qualified to seek a position as an accountant assistant in either a private or public accounting setting. Full-charge bookkeepers entering the Accountant Assistant Certificate Program are exempt from CFM 38: *Bookkeeping*. Those individuals who can submit evidence in the form of transcripts or employers' verification of equivalent course(s) or experience are also exempt from CFM 38. *Students may register for individual courses or complete the certificate program.*

### Required Courses

- CFM 38 Bookkeeping
- EDP 07 Introduction to Microcomputing  
(see page 8)
- CFM 47 Microsoft Excel 2007
- CFM 43 Fundamentals of Accounting
- CFM 39 Computer Applications in Accounting Using QuickBooks
- CFM 46 Introduction to Individual Taxation

### Recommended Courses

- EDP 18 Advanced Microsoft Word & Excel  
(see page 9)
- CFM 54 Business Taxation

### Bookkeeping

CFM 38/\$310

A practical approach that provides students with the skills to be full-charge bookkeepers. Topics include the books of original entry: cash receipts and disbursements, sales, purchase, payroll, petty cash and the general journal; subsidiary ledgers: accounts receivable, payable, and controls; the general ledger and trial balance. Business taxes (payroll and sales) are also included. *Textbook must be brought to first class.* 4 CEU

LC Wed., 7:00 p.m.-9:45 p.m., Sept. 23-Dec. 16 (no class Oct. 14) (12 sessions) Kenneth Drummond, C.P.A.

### Fundamentals of Accounting

CFM 43/\$370

Topics include accounting for inventories, plant assets, notes receivable and payable, partnership and corporation accounting, and interpretation of financial statements. (Prerequisite: CFM 38 or permission of the program coordinator.) *Textbook must be brought to first class.* 5 CEU

LC Wed., 6:45 p.m.-9:45 p.m., Sept. 16-Dec. 16 (no class Oct. 14) (13 sessions) Ansell Barrett, M.P.A.

### Introduction to Individual Taxation

CFM 46/\$310

Topics include filing requirements, sources of income, exemptions, income and exclusions, interest and dividends, capital gains and losses, itemized deductions and tax calculations. N.Y. State and City taxes are covered. 3.1 CEU

LC Tues., 7:10 p.m.-9:45 p.m., Sept. 22-Dec. 1 (10 sessions) Kenneth W. Drummond, C.P.A.

### FREE CAREER SEMINARS

**Business Bookkeeping,  
Accountant Assistant,  
Small Business Dev.** (9/10 only)

**Thursday, September 3**

**6:30 p.m.-8:00 p.m.**

or

**Thursday, September 10**

**6:30 p.m.-8:00 p.m.**

**at Lehman College, Carman Hall**

**1st Floor - room 129**

For more information, call  
(718) 960-8512

### Applications in Accounting Using QuickBooks

CFM 39/\$405

This course emphasizes a realistic approach for automated business procedures: general ledger; accounts receivable; cash receipts and payroll overview, using QuickBooks Pro 2009. Enrollment limited: one student per PC. (Prerequisites: recent completion of CFM38 and/or CFM43, EDP07, current experience or pre-test). *A USB Flash Memory device/zip stick must be brought to first class. Cost of materials \$25 must be paid at first class.* 4.3 CEU

LC Sat., 9:00 a.m.-12:00 p.m., Sept. 26-Dec. 19 (no class Nov. 28) (12 sessions) Irwin Winsten, C.P.A., President, The Software Consultants.

### Microsoft Excel 2007

CFM 47/\$285

Topics include: Excel screen layout, menus, toolbars; entering data into cells; moving and copying cells; moving through a worksheet; formatting a worksheet; working with charts, formulas, functions, lists; and preparing worksheets for the web. (Prerequisite: EDP 07 or equivalent course or experience.) *Textbook must be brought to first class. Teacher will advise students about storage medium.* 3 CEU

LC Sec. 1: Sat., 11:35 a.m.-2:05 p.m., Sept. 26-Dec. 5 (no class Nov. 28) (10 sessions)

CC Sec. 2: Tues./Thurs., 6:30 p.m.-9:00 p.m., Nov. 3-Dec. 8 (10 sessions)

### Business Taxation

CFM 54/\$95

A review of the rules and regulations concerning the taxation of business entities, i.e., individual proprietorship, partnerships and corporations. Great for anyone who owns/operates their own business as well as bookkeepers or accountants who are interested in learning more about business taxation.

1.1 CEU

LC Sat., 9:00 a.m.-12:00 p.m., Oct. 17, 24, 31 (3 sessions) Deo Singh, CPA.

### IRS Enrolled Agent Preparation Program

ENR 100/\$900

(See page 25 for course description).

LC Tues./Thurs., 7:00 p.m.-9:35 p.m., Sept. 8-Dec. 22 (no class Nov. 26) (30 sessions) Deo Singh, C.P.A.

## PAYROLL CERTIFICATION PREP



### Fundamental Payroll Certification Prep PCP 01/\$395

A course using materials approved by the American Payroll Association to prepare individuals for entry-level positions as a payroll professional. The course prepares participants for the Fundamental Payroll Certification Exam. *Cost of textbook/materials (approximately \$200) not included. Text book information available at registration.* 5 CEU

LC Tues., 6:30 p.m.-9:30 p.m., Sept. 22-Jan. 19 (no classes Sept. 29, Dec. 29) (16 sessions) Daryl Haley, Payroll Manager, White Plains Hospital Center.



### Certified Payroll Professional PCP 10/\$395

Prepare for the Certified Payroll Professional Examination. Participants must have 3 or more years of experience in order to qualify for this APA exam. The course not only prepares individuals for the exam, but also reviews all aspects of payroll including taxation, human resources (benefits) and new government regulations. *Cost of textbook/materials (approximately \$250) not included. Textbook information available at registration.* 5 CEU

LC Wed., 6:30 p.m.-9:30 p.m., Sept. 23-Jan. 20 (no classes Oct. 14, Dec. 30) (16 sessions) Daryl Haley, Payroll Manager, White Plains Hospital Center.



The goal of the **Bronx Small Business Development Center (SBDC), at Lehman College**, is to provide management assistance, access to capital, quality business counseling and training to current and prospective small-business owners, at no cost to the clients. Our mission is to improve the economic condition in the Bronx, Upper Manhattan and lower Westchester.

**THE SBDC BUSINESS IS HELPING YOU SUCCEED**  
[www.sba.gov/www.nyssbdc.org](http://www.sba.gov/www.nyssbdc.org)  
**(718) 960-8806**

## SMALL BUSINESS DEVELOPMENT

Starting and operating a small business can be a very rewarding experience. The key to success lies in understanding what's involved and choosing the "RIGHT" business. Lehman's Small Business Development (SBD) classes are designed to provide anyone who is considering starting a small business, or who is already involved in a small business, with a more comprehensive coverage of basic information essential for making your business profitable. Completion of SBD classes may also assist you when seeking financing for your new business venture.

### How to Get Started SBD 75/\$80

This introductory course in small business development surveys the various aspects of starting a business. Topics include: what it takes to succeed; legal aspects of the organization; leasing of premises; insurance needs and more. 0.9 CEU

CC Tues., 7:00 p.m.-9:00 p.m., Oct. 6-Oct. 27 (4 sessions) Greg Frazier, partner, Clarity Water Technologies.

### Advertising and Marketing a Small Business SBD 83/\$100

One of the key factors in having a successful business is to know how to market and advertise your product or service. No matter how great your product/service is, if you don't let people know about it, you can't sell it! Learn how to package and price your product/service, target your market and about various forms of advertising, promotion and distribution in this practical course – a *must* for the business owner! 1.0 CEU

CC Thurs., 7:00 p.m.-9:30 p.m., Oct. 8-Oct. 29 (4 sessions) Vincent De Martis, supply chain product manager-buyer/planner.



### An Introduction to Quickbooks 2009 for Small Business Owners SBD 90/\$165

An introductory course suitable for small business owners who have some basic knowledge of bookkeeping/accounting. Covers a practical approach to automated office procedures: general ledger, accounts payable, accounts receivable. *Pre-test may be required to assess participants' knowledge.* 1.9 CEU

LC Mon., 7:00 p.m.-9:00 p.m., Oct. 5-Nov. 30 (no class Oct. 12) (8 sessions) Roger Brewster, C.P.A.

### Business Taxation CFM 54/\$95

(See page 4 for course description).

LC Sat., 9:00 a.m.-12:00 p.m., Oct. 17, 24, 31 (3 sessions) Deo Singh, C.P.A.

## SMALL BUSINESS OPPORTUNITIES:

### How to Start a "Green" Business PDW 11/\$40

(See page 23 for course description)

LC Tues., 7:15 p.m.-9:15 p.m. Nov. 10, 17 (2 sessions) Les Judd, president and founder, Green Boroughs.

### Wedding Planner Certificate Course WPC 01/\$895

(See page 23 for course description)

Offered in partnership with Bronx Community College located at 181st Street and University Avenue.

Tues., 6:00 p.m.-10:00 p.m., Oct. 13- Dec. 15 (10 sessions)

### An Introduction to the Business of Family Day Care CCP 110/\$30

(See page 22 for course description)

CC Sat., 12:30 p.m.-3:30 p.m., Sept. 12 (1 session)



## Certificate in PERSONAL FINANCIAL PLANNING and CERTIFIED FINANCIAL PLANNER

A Program Approved by the Certified Financial Planner Board of Standards, Inc. (CFP). The Certificate Program in Personal Financial Planning (PFP) presents techniques to formulate and execute comprehensive financial plans that assist clients in accumulating, conserving and transferring personal wealth. This 219-hour program consists of the following six courses.

- Introduction to Financial Planning
- Risk Management
- Tax Planning and Management
- Retirement Planning and Employee Benefits
- Investments
- Estate Planning

To earn the PFP Certificate and fulfill the education requirement for CFP® Certification, students must complete the six required courses with a grade of "C" or better and attend a minimum of 80 percent of classroom instruction for each course. **Admission Requirements: A completed bachelor's degree, functional knowledge of financial analysis techniques and a basic understanding of economics are required prior to admission.** See application information on page .

The CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP® certification is granted only by Certified Financial Planner Board of Standards, Inc. to those persons who, in addition to completing an educational requirement such as this CFP Board-Registered Program, have also met its ethics, experience and examination requirements. **NOTE: \*To meet certification requirements, students must have their bachelor's degree within 5 years of passing the CFP exam.**

NOTE: Individual courses are open to those interested in learning more about financial planning on a space-available basis.

### Tax Planning and Management

PFP 63/\$395

For the professional providing personal financial planning services to recognize many of the income tax planning opportunities and problems that may arise. This course covers the fundamentals of individual income taxation, tax overview, terminology, computations, and interrelation of the more common income tax rules, regulation and planning techniques. Discussion and analysis focuses on practical problems and their tax planning implications. 4.5 CEU

LC Thurs., 7:00 p.m.-9:45 p.m., Sept. 17-Dec. 17 (no class Nov. 26) (13 sessions)

### Retirement Planning and Employee Benefits

PFP 64/\$395

The subject matter covers the fundamentals of retirement planning and employee benefit plans and focuses on qualified plan coverage and eligibility requirements; suitability of an investment portfolio for a qualified plan and the integration of the plan with Social Security. The basic characteristics of specific employee benefits and the income tax impact to both employer and employee are discussed. In addition there will be a recommendation of a specific plan for a particular client situation. 4.5 CEU

LC Sat., 9:00 a.m.-12:00 p.m., Sept. 26-Dec. 19 (no class Nov. 28) (12 sessions) José Guevara-Escudero, Ph.D., CFP®, president, Inter-american Economic Services.

**NEW**

### What is a Personal Financial Planner?

PFP 01/\$25 (includes registration fee)

Are you thinking of pursuing a career as a financial planner? This 2-hour seminar answers basic questions about what financial planners do, new regulations, and prospects in a fluctuating economy.

LC Sat., 9:30 a.m.-11:30 a.m., Sept. 12 (1 session)

### Introduction to Financial Planning

PFP 60/\$415

Introduction to the principles and analytic techniques of personal financial management. Topics include overview of the economic environment, time value of money concepts, CFP Board's Code of Ethics and Professional Responsibility, regulatory environment, communication skills, and the financial planning process. Participants learn how to gather, process and analyze client information, and to provide a written plan with recommendations as to risk management, investments, tax strategies, retirement planning and estate planning. *For certificate program enrollees, this course is a recommended prerequisite to all other courses.* 4.7 CEU

LC Tues., 6:30 p.m.-9:30 p.m., Sept. 22-Dec. 22 (no class Sept. 29) (13 sessions) Harry Singh, CFP®

### FREE CAREER SEMINAR

#### Personal Financial Planning

Thursday, September 3  
6:30 p.m.-8:00 p.m.

and

Thursday, September 10  
6:30 p.m.-8:00 p.m.

at Lehman College, Carman Hall  
1st floor- room 129

For more information, call  
(718) 960-8512