COURSE INFORMATION:

- Title: IREC & DI Specialist Training Program
- March 18, 2025 through September 30, 2025
  Bi-weekly sessions: Tuesday, 11am-12pm CT and Thursday, 3pm-4pm CT
- CPE Credit Hours: Attendees are eligible for 1 CPE credit hour for every 50 minutes attended, including 3 successful monitoring checks. Credit hours will be calculated each month rounded down to the nearest whole credit hour (no partial credit hours will be credited). CPE Certificates will be issued monthly after attendees respond to course evaluation.
- Field of Study: Technical (Auditing)
- Course Level: Intermediate
- Prerequisites: Basic understanding of auditing standards and auditing employee benefit plans.
- Advance Preparation: There is no required advanced preparation.
- **How to register**: Complete the Autire Academy Registration Form. Terms of Service, including a Confidentiality agreement, must be acknowledged and accepted. An event link will be emailed to the individual participants that are registered.

COURSE CONTENT:

This is a series of sessions that will provide a deep-dive of how to efficiently perform full population testing for 401(k) audits using Autire's audit methodology while meeting the guidelines set forth by generally accepted auditing standards. Each session will provide practical knowledge and skills by using real data to examine testing approaches, plan operational failures, and audit conclusions.

LEARNING OBJECTIVES:

Upon successful completion of each session, participants should be able to:

- Know how to identify the attribute and relevant assertions being tested
- Research source data files to understand the difference between true failures and false failures
- Research false failures to understand whether better data is needed/available and determine when to apply alternative procedures
- Understand why true failures have occurred, determine if there is any negative impact to the operations of the plan, and identify the risk of material misstatement to the financial statements
- Conclude on full population testing step, including assigning any reportable findings, making AJEs, and accumulating uncorrected misstatements

DISCUSSION LEADERS:

The discussion leaders for each session will vary. All discussion leaders are qualified both with respect to program content and teaching methods used.

Jennifer Moore, CPA, QKA® | Chief Experience Officer - Jen leads Autire's client support team, where she focuses on optimizing technology use so clients achieve maximum efficiency. Her years of performing 401(k) audits serves as the foundation for a deep understanding of auditing principles, which has been instrumental in overcoming data acquisition hurdles, facilitating automated full population testing, and reducing manual interventions. As the author of many of the document gathering instruction sets, she is the resident expert on data. Jen works closely with the development team to ensure information imported into the system is effectively leveraged to provide comprehensive audit evidence and testing. Her core knowledge of the data, scripts, and attributes tested allows her to provide valuable insights into researching false failures, as well as understanding the causes of true failures and their impact on plan operations.

Brian Price, CPA, QKA® | Chief Executive Officer - Brian Price is the founder and leader of Autire Technologies, LLC. With over 30 years of experience as a CPA, Brian has built a successful assurance practice and has been in the shoes of Autire's client base. He recognized the need for a more efficient way to perform 401(k) audits and founded Autire to address this challenge. Under Brian's leadership, Autire has developed innovative solutions that have streamlined the audit process, saving time and reducing costs for their clients. Brian is passionate about leveraging technology to improve the accounting profession and is committed to providing exceptional service and support to CPAs conducting 401(k) audits. His extensive experience, innovative approach, and dedication to the profession have made Autire a trusted partner for CPAs across the country.

Cori Pruner, CPA | Client Success Manager - Cori brings nearly a decade of experience auditing defined contribution plans and leading process improvement initiatives. Having trained both entry-level staff and partners, she has a deep understanding of the efficiency and technical challenges CPAs face when conducting 401(k) audits. Now, as a Customer Success Manager at Autire, Cori applies her auditing expertise to help CPAs leverage technology to enhance audit quality, improve efficiency, and navigate complex compliance issues. Her technical knowledge and hands-on experience uniquely position her to guide CPAs through their Autire audits with confidence—teaching them how to analyze source data files, differentiate between true and false failures, assess the impact of audit findings, and conclude on full population testing with precision and efficiency.

Ellie Kightlinger | Client Success Manager - As a Client Success Manager at Autire Technologies, Ellie brings over 15 years of experience in employee benefit plan audits, providing CPAs and audit professionals with the knowledge and tools to optimize audit processes. Her extensive background includes auditing Defined Contribution and Defined Benefit Plans, Master Trusts, Health & Welfare Plans, ESOPs, and Terminating Plans. Ellie's expertise in audit methodology, compliance, and technology-driven efficiencies uniquely qualifies her to educate CPAs on best practices in employee benefit plan audits. She understands the complexities auditors face in testing attributes and assertions, identifying true and false failures, applying alternative procedures, and assessing risks of material misstatement. Through her role, she helps professionals leverage data analytics and automation to improve audit quality, enhance compliance, and streamline full population testing. Ellie is passionate about bridging the gap between technology and audit best practices, ensuring CPAs have the insights and tools to conduct efficient, accurate, and compliant audits.

Kevin Elam, CPA | Client Success Manager - As a Client Success Manager at Autire, Kevin empowers accounting firms to streamline their Employee Benefit Plan (EBP) audits by utilizing Autire's cutting-edge proprietary software. Kevin's deep industry knowledge developed from over 12 years of extensive experience in specialized EBP auditing enable him to provide exceptional guidance and support to firms, ensuring they maximize efficiency and address any challenges that arise during the audit process. Kevin's current role uniquely qualifies him to ensure that participants not only grasp the theoretical concepts but also gain practical insights and tools to enhance their auditing practices.

Kyle Dozier | Client Success Manager - Kyle is a seasoned auditor with 15 years of experience in public accounting, where he focused on a wide variety of clients, with a special emphasis on Employee Benefit Plan (EBP) audits. During his career, he developed deep expertise in auditing practices, risk assessment, and identifying material misstatements in financial statements. Kyle transitioned to his role as a Client Success Manager at Autire, where he combines his auditing background with his proficiency in using Autire's software to support firms through their EBP audits. With his dual expertise in auditing and customer success management, Kyle is well-equipped to provide valuable insights and actionable knowledge to CPAs, enhancing their skills and deepening their understanding of EBP audits and the effective use of Autire's auditing technology.