

# Organization Descriptions and Policies

**Guiding You. Beyond the Numbers.** Is the No. 1 reason we come to work each day at Wegner CPAs. We care about doing what is right for our clients and our community. Our professionals guide individuals, businesses and nonprofits with personal service, education, and knowledge. To ensure that client needs are always met, our skilled accounting professionals are truly attentive on educating clients to provide them with the knowledge required to make sound decisions every day. We care about forging stronger relationships, understanding the business and the market clients operate in, and identifying specific areas where clients need continuing advice. We strive to provide our clients with ongoing educational opportunities throughout the year that will help them perform their jobs more effectively and efficiently.

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## Refund Policy

For questions about your registration or to cancel your registration for an upcoming event, please send your request to [sarah.bloom@wegnercpas.com](mailto:sarah.bloom@wegnercpas.com). Full refunds will be given for cancellations made 14 days prior to the event. Refunds for cancellations received less than 14 days prior to the event will be made at the discretion of Wegner CPAs and may include a service charge of \$10. Registrations may be transferred to another individual within the same organization.

## Cancellation Policy

If a seminar/event is cancelled on behalf of Wegner CPAs and not rescheduled to a different date, a full refund will automatically be made to the registrant. All registrants will receive notice of the cancellation via e-mail to the address supplied at the time of registration.

## Complaint Resolution Policy

Wegner CPAs welcomes feedback from all participants. We strive to resolve any grievances as it relates to our program offerings in a professional, fair, and timely manner. Grievances regarding a particular course should be directed to [melodi.bunting@wegnercpas.com](mailto:melodi.bunting@wegnercpas.com). All grievances are kept confidential. If the grievance remains unresolved, it will be directed to the Partner-In-Charge to resolve.

## Course Update Policy

Each new CPE course is developed by at least one CPA who is knowledgeable in the subject area. Each course is then reviewed by another CPA or subject matter expertise. If applicable, the reviewer's input is incorporated into the course. Courses that are offered on a recurring basis are reviewed and updated annually.