IN MEMORIAM

James W. Wilkerson Laurel, MS Died May 28, 2023

RHYNE NEUBERT, JR.
Ridgeland, MS
Died June 15, 2023



MEMORIAL GIFT

To the EDUCATION FOUNDATION In memory of

James W. Wilkerson Laurel, MS By Randal M. Hill

RANDAL M. HILL Laurel, MS

In memory of
David Lyle
Madison, MS
By
Jim Koerber

Hattiesburg, MS

Ronald Applewhite Jackson, MS

By
Dr. James W. Davis
Oxford, MS

In memory of
RHYNE NEUBERT, JR.
Ridgeland, MS
By
J. MURRAY UNDERWOOD
Jackson, MS
By

Ronald Applewhite

Jackson, MS

By

Stephanie Halle-Edwards
Madison, MS

By

Dr. James W. Davis
Oxford, MS

In memory of
SANDRA B. PARKS
Clinton, MS
By
PHANIE HALLE-EDWAR

Stephanie Halle-Edwards
Madison, MS



2023-2024 MSCPA Officers

Newly elected officers for the 2023-2024 MSCPA fiscal year are Jerry Goolsby, Chairman; Tom Walker, Vice Chairman/ Chairman-Elect; Julia Jesuit, Secretary; and Chase Farmer, Treasurer. Annette Herrin was elected to a three-year term as an at-large member of the Board of Governors. Officers were elected June 24 during the Annual Business Meeting at the Sandestin Golf and Beach Resort.



Jerry Goolsby

Jackson

Chairman



Tom Walker
Jackson
Vice-Chairman/
Chairman-Elect



Julia Jesuit Ridgeland Secretary



Chase Farmer
Tupelo
Treasurer



Annette Herrin Hattiesburg At-Large Board Member

2023-2024 **DUES CAN BE PAID ONLINE**

Members can pay dues online for MSCPA membership year July 1, 2023 through June 30, 2024. Go to www. ms-cpa.org/ and login with your email and password. Then go to the Pay Dues page (under Members) to pay your dues for 2023-2024. If you need to change your member level, please contact Stephanie Edwards, MSCPA Director of Finance, at 601-856-4244.

Firm admins can also print or pay your firm employees' dues. Contact Noma Gillis, ngillis@ms-cpa.org to be added as a firm admin.

Dues notices will go in the mail in August to the members who have not yet paid online. Payment is due upon receipt of the statement. Dues not paid by October 1 are past due and must include a \$25.00 late fee. After October 1, members who have not paid their dues will no longer receive member benefits including discounts on CPE.





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Certified Public Accountants
306 Southampton Row
The Commons
Highland Colony Parkway
Ridgeland, MS 39157

PHONE: (601) 856-4244 FAX: (601) 856-8255 E-MAIL ADDRESS:

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Tom Walker JACKSON

Treasurer

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Secretary

Julia Jesuit RIDGELAND

President/CEO

Karen Moody RIDGELAND

The CPA Newsletter is the official publication of the Mississippi Society of Certified Public Accountants. The Newsletter invites articles of interest to the profession and gives credit to the author; however, it reserves the right to edit articles for correct spelling, wording and punctuation.

Opinions expressed are not necessarily the official policy of the MSCPA. Advertising is accepted in good faith that the product/services are of value stated.

Welcome New Members

HALLIE BUFKIN

GranthamPoole PLLC *Ridgeland, MS*

Avenell Ferguson

GranthamPoole PLLC *Ridgeland, MS*

RACHEL KINZER

Moore Colson CPAs and Advisors *Jackson*, *MS*

Lauren Luke
Carriere, MS

Natchez, MS

SIM "COLE" MOSBY Silas Simmons, LLP

JASON PATTERSON *Irving, TX*

MSCPA WELCOMES

New Staff Director of Marketing and Communications ANNA THORN



We are pleased to announce the recent hiring of Anna Thorn as the MSCPA's new Director of Marketing and Communications. Anna has over 17 years' experience working for non-profit associations. Previously, she worked at the Mississippi School Boards Association as communications manager, and the Mississippi Manufacturers Association in various roles including communications specialist and communications director. She is a graduate of Belhaven University where she earned a bachelor's degree in business management.

We are pleased to welcome Anna to MSCPA and look forward to her contributions to the Society as a whole. If you would like to reach out and introduce yourself, please feel free to do so at athorn@ms-cpa.org.

Anna has replaced Katelyn Strong, who was a great asset to MSCPA for over a year. We send our best wishes to her and her family in all their future endeavors and appreciate the hard work she contributed to MSCPA.

MAULDIN WINS FREE SANDESTIN GETAWAY

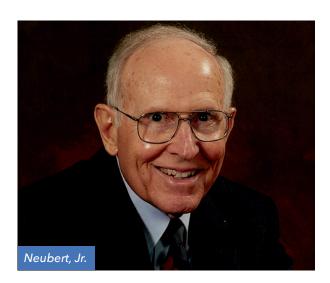
All members who booked their room directly with Sandestin using our group code by May 1st were entered into a drawing to win a free two-night stay in Luau at Sandestin. A name was drawn during our Saturday dinner at convention on June 24th. MSCPA announced Shawn Mauldin of Adkerson School of Accountancy at Mississippi State University as our winner! Thank you for joining us at convention and booking your room in our room block.



Member News

Rhyne Neubert, Jr.

MSCPA 1972-1973 President Dies at 90



Rhyne E. Neubert, Jr. passed away on June 15, 2023. Neubert, born on April 21, 1933, grew up in Okolona, Mississippi and spent part of his childhood in Memphis, Tennessee before returning to Okolona for junior high and high school.

He attended Mississippi State University earning undergraduate and graduate degrees in accounting. During this time, he also joined the National Guard where he served for almost a decade. In 1958, he moved to Jackson, Mississippi to start his career in public accounting.

In 1961, Neubert met the love of his life, Cecelia Lois Pigott, and they were married at First Baptist Church. They had two children, Lisa Neubert Chisholm and David Rhynehardt Neubert.

Neubert was a tax partner in the Jackson office of Peat, Marwick, Mitchell & Co. He retired from the firm in 1990 to start his own wealth accumulation advisory firm.

Neubert served as MSCPA President during 1972-73 and was honored by the MSCPA in 1996 as the Public Service Award Winner for outstanding service to his community. He began his career with the Jackson firm of Dick D. Quin & Co.; that firm subsequently merged with Peat Marwick in January 1961. His first leadership roles within the MSCPA were with the Central Chapter and that led to him becoming the 1967-68 secretary.

Neubert is best remembered within the MSCPA for his 1972 formation and long-time leadership of the MSCPA Education Foundation, a 501(c)3 organization separate

from the Society itself. Former MSCPA Executive Director Jack Coppenbarger called the founding of the Foundation one of the most significant events in the history of the Society. Along with Rhyne Neubert, Edward A. DeMiller, Ralph F. Neely, and James W. Davis have played a role over much of the Foundation's history, but it was Neubert who most closely watched over the investments and kept the Trustees and Society staff informed of the Foundation's assets, growing the initial \$100 contribution to several hundred thousand dollars. James Davis said, "Rhyne Neubert is responsible in no small part for the success of the Education Foundation over his life of service." Scholarships are awarded each fall to students across the State to help keep the pipeline full for future CPAs. One of the graduate scholarships was even named for Neubert in 2016.

In civic affairs, Neubert was chairman of the Mississippi Tax Institute and the Mississippi Economic Council's General Committee on Taxation. He was president of the Estate Planning Council of Mississippi. As a result of his position as a tax partner and his leadership in tax-related organizations, Neubert was

a frequent speaker on tax topics. He was an active member of the University Club, the North Jackson Kiwanis Club, and the Colonial Country Club. In addition to serving as a Trustee for the MSCPA Education Foundation, he held a similar position with the TRUST—the Foundation for Baptist Health Systems.

Neubert was also known to occasionally author a letter to the editor of the Jackson Clarion-Ledger pointing out areas of government waste and inefficiency. He was also frequently quoted in the press on matters of tax policy.

Art was Neubert's hobby and he sometimes participated in art shows where his artwork was displayed and offered for sale. Examples of his work hang on the walls of the MSCPA offices in Ridgeland.

Rhyne was a deacon at First Baptist and held roles as overall chair, finance chair, and vision chair. Most of all, he loved to study and teach God's word. During retirement, he spent countless hours studying Scripture, teaching Sunday school, and preparing lessons distributed as a resource to other teachers. His hope was in the Lord.

Rhyne was a devoted husband, father, and grandfather. His encouragement and counsel were always a blessing to his family. His special and loving care for his wife Cecelia during the last years of her life was an inspiration to the family.

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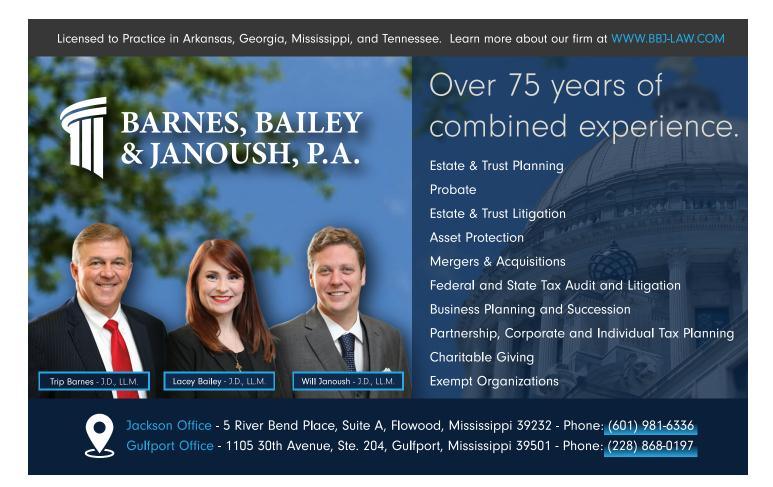
msfcu.us



PAST CHAIRMEN ATTEND 2023 MSCPA CONVENTION



Sitting from left: Annette Pridgen (2020-2021), Cheryl Sykes (2015-2016), Jan Lewis (2008-2009), Donna Bruce (2019-2020), Karen Moody (2014-2015), Linda Keng (2007-2008); Standing from left: David Miller (2003-2004), Bob Cunningham (2009-2010), Gary Walker (1995-1996), Stacy Thomas (2011-2012), Jimmy Burkes (1992-1993), Ricky Bullock (2021-2022), Ed Jones (1997-1998), Lee Adams (2012-2013), Charlie Prince (2016-2017)





BOARD OF GOVERNORS MEETING

AUGUST 10, 2023



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CONTRIBUTE to the PAC

The MSCPA Political Action Committee (PAC) is people working together to improve our profession. Members' support gives us the ability to better achieve our annual legislative agenda.

The MSCPA PAC is a non-partisan committee comprised of CPAs who uphold the political voice of the CPA profession. By combining financial resources, the PAC is able to leverage its impact for positive results. The MSCPA PAC pools members' contributions and contributes funds to friendly State legislators and candidates who support CPA and business interests and encourages and supports our own CPAs as political candidates.

The MSCPA's Legislation Committee closely monitors legislation and State agency proposals to determine their impacts upon the profession.

The MSCPA has been successful in getting valuable tax legislation passed during the last four legislative sessions. Our relationships with key legislators and State leadership are critical in our efforts. With August primaries and the general elections fast approaching, we need to build our funds to allow more substantial contributions now and for the future. Please consider making a \$100 contribution to the PAC or contributions for each of the partners in your firms.

Members can contribute to the PAC when paying annual dues, or members can contribute anytime by visiting www.ms-cpa. org/advocacy.

Contributions or gifts to the MSCPA are not deductible as charitable contributions for federal income tax purposes. Dues payments are deductible by members as an ordinary and necessary business expense. However, MSCPA has determined that 5% of your dues are attributable to lobbying activities and are non-deductible.

CHAPTER DUES

MSCPA chapter members are now able to pay for 2023-2024 dues by downloading the dues notice linked on each of our nine chapter webpages.

RENEWAL PERIOD: JULY 1, 2023 - JUNE 30, 2024

Chapter officers are meeting and planning CPE Lunch and Learns and other chapter events. Be on the lookout for upcoming event information. For chapter information including leadership, event details and photos, check out our chapter webpages at www.mscpa.org/membership/chapters.



2023 MSCPACONVENTION

Members traveled to Sandestin Golf and Beach Resort in Destin, Florida June 21-25 for the 2023 Annual Convention and Business Meeting. This year's convention welcomed members, including first-time attendees, spouses, children and guests, plus event sponsors and exhibitors. The convention returns to Sandestin next year June 19-23, 2024. Additional convention photos have been posted to Google Photos and the link can be found on the Annual Convention page of the Society's website (https://www.ms-cpa.org/education/annual-convention).



































































































































































Miya Warfield Bates, Audit Supervisor, Matthews, Cutrer & Lindsay, PA, & Alderwoman, City of Gluckstadt

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Meet the FIRMS

Members of the MSCPA Young CPA Network will visit with college accounting students at the Meet the Firms events and will talk with them about their future plans for becoming a CPA.











MISSISSIPPI STATE









Young CPA President Represents at MSCPA Annual Meeting

Ashley Sullivan, outgoing YCPA President, reported on the Network's accomplishments during her term at the MSCPA Annual Business Meeting on June 24. This meeting was held during our Annual Convention in Sandestin, Florida. MSCPA Chairman Scott Christian presented Ashley an award of appreciation for her leadership and dedication.

We would like to formally congratulate Peyton Gordon on becoming the new YCPA President as July 1, and look forward to the upcoming year under her leadership. Peyton is a Tax Manager at HORNE.



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How to Create a Written Information Security Plan for Data Safety



With data security incidents continuing, tax professionals must have current written information security plans or WISPs.



Federal law, enforced by the Federal Trade Commission, requires professional tax preparers to create and maintain a written data security plan.



Having a WISP protects businesses and clients while providing a blueprint of action in the event of a security incident. In addition, a WISP can help if other events occur that can seriously disrupt a tax professional's ability to conduct normal business, including fire, flood, tornado, earthquake and theft.



The Security Summit developed a plain language sample plan that tax pros can use for guidance in making their own WISP. The **sample plan** is available on IRS.gov.



A security plan should be appropriate to the company's size, scope of activities, complexity and the sensitivity of the customer data it handles.

Developing a WISP

A good **WISP** should identify the risks of data loss for the types of information handled by a company and focus on three areas:

- 1. Employee management and training.
- 2. Information systems.
- 3. Detecting and managing system failures.

Understanding post-breach responsibilities is important in creating a WISP. A good resource is the FTC's Data Breach Response Guide.

As a part of the plan, the FTC requires each firm to:

- Designate one or more employees to coordinate its information security program.
- Identify and assess the risks to customer information in each relevant area of the company's operation and evaluate the effectiveness of the current safeguards for controlling those risks.
- Design and implement a safeguards program, and regularly monitor and test it.
- Select service providers that can maintain appropriate safeguards.
- Evaluate and adjust the program considering relevant circumstances, including changes in the firm's business or operations, or the results of security testing and monitoring.

Maintaining a WISP

A good security plan requires regular maintenance and upkeep. Here are tips to keep a WISP effective:

- Once completed, tax professionals should keep their WISP in a format that others can easily read, such as PDF or Word. Making the WISP available to employees for training purposes is also encouraged. Storing a copy offsite or in the cloud is a recommended best practice in the event of a physical disaster.
- It is important to understand that a WISP is intended to be an evergreen document. It is important to regularly review and update any security plan, along with adjusting the plan to accommodate changes to the size, scope and complexity of a tax professional's business.
- As part of a security plan, the IRS also recommends tax professionals create a data theft response plan, which includes contacting their IRS Stakeholder Liaison to report a theft. Also see the FTC data breach response requirements listed above.

Publication 5709 (11-2022) Catalog Number 93463H Department of the Treasury Internal Revenue Service www.irs.gov



FEDERAL TRADE COMMISSION

PROTECTING AMERICA'S CONSUMERS

An updated Federal Trade Commission rule took effect on June 9, 2023, and it affects many members, including tax practitioners.

A Written Information Security Plan (WISP) is required by the Federal Trade Commission's (FTC) Safeguards Rule of the Gramm-Leach-Bliley Act (GLBA) whereby financial institutions, including tax preparers, must develop, implement and maintain a comprehensive security plan to protect customer and client information.

The following free resources below may offer assistance about how to comply.

AICPA Resources

https://www.aicpa-cima.com/resources/article/professional-responsibilities-in-data-security-for-tax-professionals "Professional responsibilities in data security" – this page contains various resources and information and is open to all AICPA members.

Journal of Accountancy article February 1, 2023

"How the FTC Safeguards Rule may affect your CPA firm"

Tax Adviser article May 1, 2023

"Complying with the Safeguards Rule for information security"

IRS Publication 5708

"Creating a Written Information Security Plan for your Tax & Accounting Practice" with sample template



MSCPA ANNUAL MISSISSIPPI TAX INSTITUTE

REVISED DATE:

MONDAY & TUESDAY, DECEMBER 11-12, 2023

IN-PERSON & LIVESTREAM AT THE SHERATON-THE REFUGE, FLOWOOD, MS

CONFERENCES

MSCPA 39TH ANNUAL

GOVERNMENTAL ACCOUNTING & AUDITING CONFERENCE

Approved for 16 CPE Credits

IN-PERSON AND LIVESTREAM AT THE MSCPA TRAINING CENTER IN RIDGELAND

WHO SHOULD ATTEND

- · CPAs working in federal, state or local government
- Public practitioners with government clients
- Auditors and accounting professionals who need to be aware of emerging developments

AGENDA

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Breakfast & Networking

8:10 AM	Welcome & Announcements
8:15 AM	GASB Update Lisa Parker, Governmental Accounting Standards Board
10:20 AM	Break
10:35 AM	Chaos in the Profession: Impact on Governmental Work Phillip Chu, Mississippi Department of Corrections, and Lauren Wray, KPMG, LLP
11:50 AM	Lunch Break
12:50 PM	Sampling Best Practices

2:50 PM	Sampling Best Practice
	Ctanhania Dalmartraa

Office of the State Auditor (OSA)

1:40 PM **Common Deficiencies in Single Audits** Stephanie Palmertree, OSA

2:30 PM **Break**

2:40 PM **OSA Update**

Stephanie Palmertree, Leigh Taylor, and Tom Chain

4:20 PM Adjourn

GOLD SPONSOR:



FRIDAY, AUGUST 18, 2023

	Breakfast & Networking
	Welcome & Announcements
8:30 AM	GASB 87 & 96 Leases:

Post Implementation Lessons Learned

Louis Stratton, DebtBook

Peer Review Update Chuck Jordan, Partners in Peer Review

Break

ARPA: You Have It. Now What Do You Do With It? Mason Herrin, CPA, HORNE

11:35 AM **Best Practices in Contracting** with Government Boards

Sam Gregory, J.D., Butler Snow, LLP

12:25 PM **Lunch Break**

Data Analytics: Creative Uses in the Profession 1:15 PM Samantha Atkinson,

Mississippi Department of Medicaid

2:30 PM

3:30 PM

2:40 PM **GAO Yellowbook Update & Proposed Changes**

Gerry Boaz, State of Tennessee

Cybersecurity Issues in Government: Be Very Prepared & Very Afraid

Bill Cranford, FORVIS

4:20 PM Door Prizes & Adjourn

To register, please visit www.ms-cpa.org.

MSCPA Banking and Finance Conference

THURSDAY, AUGUST 24, 2023

In-Person and Livestream at the MSCPA Training Center in Ridgeland

Don't miss the opportunity to receive key updates from top regulators, engage in discussions with bank leaders and firm partners and prepare for the year ahead.

Who should attend?

Public practitioners with banks & savings institution clients, preparers and/or auditors of financial statements, financial executives working in both large and small institutions, as well as regulators controllers and CFOs.

Credits: 8

Cost: Member \$200 Non-Member \$275

Featured Topics

• Internal Audit Update
Stewart Greene and

Stewart Greene and Michael Watkins, T.E. Lott

- Update on recent state & local tax developments affecting banks

 John Fletcher, Jones Walker, LLP
- Bank Executive Panel

Kevin Chapman, Renasant; Hoppy Cole, The First; Michael Dudley, The Commercial Bank; Moderated by Gordon Fellows, Mississippi Bankers Association

- Economics Update

 Dudley Carter, Stifel
- Current liquidity & risk management consideration for banks and bank holding companies

Shannon Boyt, Federal Reserve Bank of Atlanta

• Asset liability management & the current banking environment

Jeff Fair, American Planning Corporation

Gold



































Register online at www.ms-cpa.org

MSCPA AGRICULTURAL AND FARM ACTIVITIES CONFERENCE

TUESDAY, AUGUST 29, 2023

In-Person and Livestream at the MSCPA Training Center in Ridgeland

This conference covers special tax rules and tax accounting methods pertaining to agricultural and farming activities and recent tax law changes that affect farmers and more.

CREDITS: 8

COST: \$215

Featured Topics:

- New Tax Laws and Expiring Provisions for Agriculture – Mike Frost, CPA
- Economic Update Andy Gipson, Commissioner of Agriculture and Commerce
- Agricultural Production Issues, Stress, and Risk –
 Dr. Brian Mills, Assistant Professor, Mississippi State
 University, Department of Agricultural Economics
 with the Delta Research and Extension Center
- 2023 Agricultural Financial Condition Dr. Kevin Kim, Assistant Professor, Department of Agricultural Economics at Mississippi State University
- Marketing Strategies: How They Impact Risk and Cash Flow – Will Maples

REGISTER ONLINE AT WWW.MS-CPA.ORG



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Coalition Including CPAs Calls Attention to New Beneficial Ownership Information Reporting Requirements

The American Institute of CPAs (AICPA) joined a coalition of organizations who have come together to make taxpayers and practitioners aware of the new Beneficial Ownership Information (BOI) reporting requirement. BOI is an anti-money laundering initiative enacted through the Corporate Transparency Act (CTA) in 2021, which mandates that BOI information is reported to the Financial Crimes Enforcement Network (FinCEN). It is estimated that there will be 32.6 million filings in 2024, and 5-6 million filings each year thereafter, with the potential for steep penalties for the taxpayer.

There is concern that many business owners are unaware of this filing requirement. Many small businesses will be subject to this requirement and the goal is to inform them prior to the regulation start date of January 1, 2024.

The coalition includes the following organizations: AICPA, Latino Tax Pros, National Association of Black Accountants, Inc. (NABA), National Association of Enrolled Agents (NAEA), National Association of Tax Professionals (NATP), National Conference of CPA Practitioners (NCCPAP), National Society of Accountants (NSA), National Society of Black Certified Public Accountants, Inc. (NSBCPA), National Society of Tax Professionals (NSTP), Padgett Business Services, the Diverse Organization of Firms (DOF), H&R Block, Paychex, and Prosperity Now.

As FinCEN releases more information on this reporting requirement, MSCPA and AICPA will keep members updated on the issue. In the meantime, the coalition will continue to raise awareness and educate taxpayers of their filing obligations.

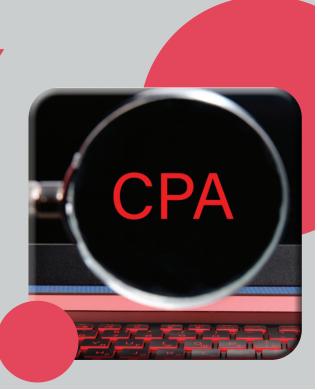
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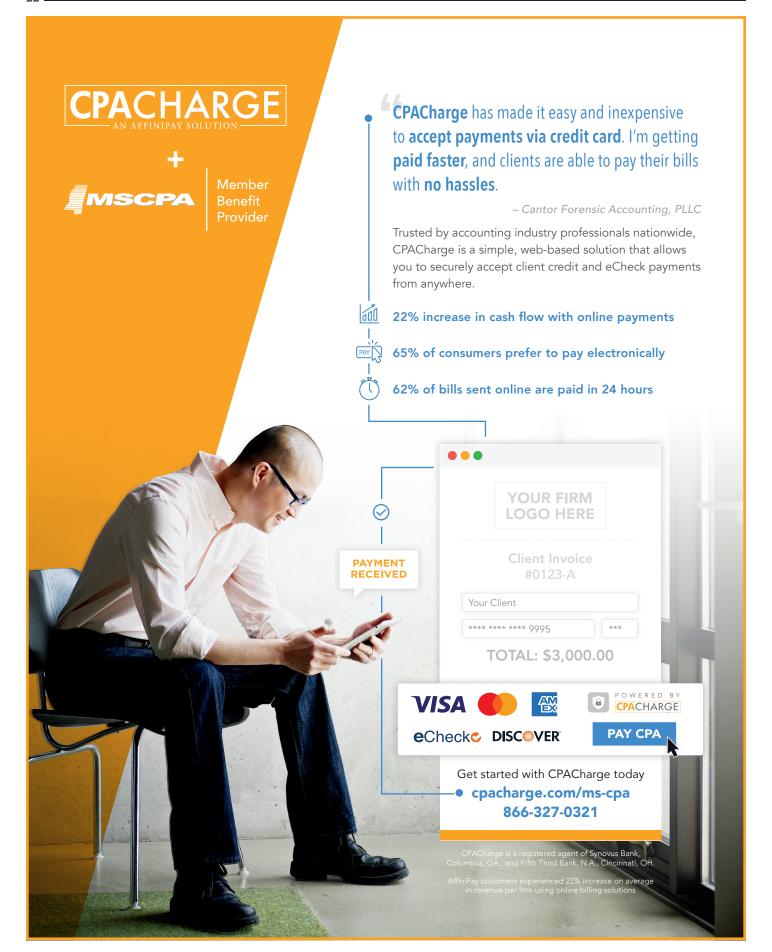
FIND-A-CPA DIRECTORY

The Find-A-CPA Directory is an online referral database available to the public free of charge. This directory allows individuals to search for CPA members by city/zip code, industry expertise, or by keyword.

If you're a certified member of the MSCPA, you can enroll through the MSCPA website via your profile and you can also include a headshot.

www.ms-cpa.org





Mississippi Society of Certified Public Accountants

306 Southampton Row Ridgeland, MS 39157 www.ms-cpa.org



Phone: 601-856-4244 Fax: 601-856-8255

Toll Free (inside Mississippi): 1-800-772-1099 Email: memberservices@ms-cpa.org

2023-2024 DUES NOTICE

MSCPA MEMBERSHIP YEAR JULY 1, 2023 THROUGH JUNE 30, 2024

To Pay Online

 $Go\ to\ https://www.ms-cpa.org/membership/pay-dues.$

To Pay by Check

Mail your dues notice and check made payable to: Mississippi Society of CPAs, 306 Southampton Row, Ridgeland, MS 39157.

To Pay by Fax

Send a completed dues notice with credit card information to MSCPA at 601-856-8255.

Firm Admins

Firm admins can print or pay firm employees dues. Contact Noma Gillis, ngillis@ms-cpa.org, to be added as a firm admin.

ANNUAL DUES Annual dues billed is based on your prior year member level. If your member

level has changed, please contact Stephanie Edwards, MSCPA Director of Finance, at 601-856-4244 to make an online payment. Otherwise, make changes below.

MEMBER LEVEL	DESCRIPTION	DUES	BILLED
Certified 3 Years or More	A CPA earning any fee from public practice in Mississippi and holding original CPA certificate 3 years or more.	\$210	
Certified Less than 3 Years	A CPA earning any fee from public practice in Mississippi and holding original CPA certificate less than 3 years.	\$170	
Not in Public Practice	Any CPA employed in Mississippi who is not engaged in any public practice.	\$175	
Non-Resident	Non-resident CPA who resides and works outside of Mississippi.	\$120	
Associate	Non-CPA or inactive CPA who is not employed full-time.	\$105	
Retired	CPA earning no fee and has reached full retirement age.	\$50	
Life Member	MSCPA member for 40+ consecutive years who has reached full retirement age and is retired, earning no fee, and has notified the MSCPA.	\$0	

and necessary business expense. However, MSCPA has determined that 5% of your dues are attributal			namary
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and its Education Foundation 306 Southampton Row Ridgeland, MS 39157

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- Biloxi-Ocean Springs Area CPA grossing \$200K *Sold*
- Tuscaloosa, AL CPA grossing \$175K *Available*
- Montgomery, AL area CPA grossing \$155K *Available*
- Auburn Opelika CPA grossing \$330K *Sale Pending*
- Okaloosa County, FL (Western Panhandle) CPA grossing \$365K *Available*
- Pensacola, FL Enrolled Agent grossing \$130K *Available*
- Southwest TN / Northwest MS practice grossing \$160K
- Knoxville, TN practice grossing \$195K *Sale Pending*
- East Nashville CPA grossing \$210K *Sale Pending*
- South of Knoxville, TN CPA grossing \$425K *Available*
- Dyersburg, TN area CPA grossing \$320K *New*

For more info on any of these listings or to sell your practice, contact Lori Newcomer, CPA and Tim Price, CPA at (888) 553-1040 or PNgroup@APS.net, or visit www.APS.net.

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