



## MSCPA Chairman-Elect Anita Goodrum Names 2025-2026 Committee Chairmen

MSCPA Chairman-Elect Anita Goodrum has named Committee Chairmen to serve in the 2025-2026 fiscal year. Representatives of the multigenerational young professionals have been named as YCPA Chairs going forward.

### ACCOUNTING & AUDITING

*Shannon Adams, Ridgeland*  
YCPA: Heather Carter, Natchez

### ADVISORY TO STATE BOARD

*Ed Jones, Pascagoula*  
YCPA: Josh Norris, Jackson

### AGRICULTURAL

*Pam Stevenson, Ridgeland*  
YCPA: Walt Thompson, Jackson

### AWARDS, EDUCATION & SCHOLARSHIPS

*Shawn Mauldin, Starkville*  
YCPA: Kayla Jo Griffiths, Flowood

### BANKING

*Steven Cooksey, Meridian, and  
Bradley Floore, Hattiesburg*  
YCPA: Dylan Edwards, Ridgeland

### BUSINESS VALUATION & LITIGATION SUPPORT

*Rob King, Hattiesburg*  
YCPA: Rachel Kinzer, Jackson

### CONTINUING PROFESSIONAL EDUCATION

*Bill Taylor, Taylor*  
YCPA: Nicholas Fenske, Ridgeland

### FIRM ADMINISTRATION & DEVELOPMENT

*Ed Maxwell, Oxford*  
YCPA: Will Christian, Natchez

### GOVERNMENTAL ACCOUNTING & AUDITING

*Billy Morehead, Clinton*  
YCPA: Phillip Chu, Jackson

### HEALTH CARE SERVICES

*Kimberly Williams, Ridgeland*  
YCPA: Baxter Howell, Jackson

### INDUSTRY

*Megan Tidwell, Brandon*  
YCPA: Allison Garner, Oxford

### INSURANCE

*Lance Mize, Nashville*  
YCPA: Caitlin Goodman, Natchez

### LEGISLATION

*Linda Keng, Jackson and  
Tony Huffman, Flowood*  
YCPA: Rob Huffman, Flowood

### LONG RANGE PLANNING

*Wil Crawford, Ridgeland*  
YCPA: Yale Murphy, Madison

### MEMBERSHIP

*Lynne Godfrey, Ridgeland*  
YCPA: Randa Craig, Pass Christian

### NOT-FOR-PROFIT

*Amie Dean, Ridgeland*  
YCPA: Miya Bates, Ridgeland

### PROFESSIONAL CONDUCT

*Tolliver McMullen, Ridgeland*  
YCPA: John Luley, Ridgeland

### TAXATION

*Peyton Gordon, Ridgeland, and  
Rob Zischke, Flowood*  
YCPA: Noah Davis, Meridian

### YOUNG CPA LIAISON

*Allison Wilson, Bolton*  
YCPA: Jack Kaler, Ridgeland

## IN MEMORIAM

**R. Kailey Burroughs**  
*Kosciusko, MS*  
Died March 7, 2025

**Tony Chance**  
*Forest, MS*  
Died March 18, 2025

**Gregory Barron**  
*Oxford, MS*  
Died March 28, 2025

## State Board & MSCPA New CPA Ceremony

May 17, 2025

Two Mississippi  
Museums  
Jackson, MS



## LEADERSHIP LUNCHEON May 8th in Conjunction with Committee Day

Join us for the 10th annual Leadership Luncheon, marking the commencement of the upcoming new fiscal year, on **Thursday, May 8**, from 11:30 a.m. to 12:45 p.m. at the MSCPA Training Center in Ridgeland.

This luncheon will coincide with Committee Day, welcoming incoming/outgoing Committee Chairmen, incoming/outgoing YCPA Chairs, candidates for office this year, MSCPA Board of Governors, Young CPA Network Board, and guests.

Kindly RSVP via the invitation survey that Karen Moody will send.



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## OFFICERS

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### *Vice Chairman/Chairman-Elect*

Anita Goodrum

EUPORA

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### *Secretary*

Lydia Windham

JACKSON

### *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

## Cooper Grafe

MS Office of the State Auditor

Jackson, MS

## Justin Head

MS Methodist Rehabilitation Center

Jackson, MS

## Karen K. Hall

Miskelly Furniture

Pearl, MS

# MSCPA COMMITTEE DAY

*Thursday, May 8, 2025 • In-Person Only*

MSCPA Committees will meet Thursday, May 8, for Committee Day at the MSCPA Training Center in Ridgeland.

To view the current committee rosters, members can login at [www.ms-cpa.org](http://www.ms-cpa.org) and click Members > Committees. Committee members will receive a notice of details on their committee meeting schedule.

Committees will meet during morning (9:00-11:00 a.m.) or afternoon (1:00-3:00 p.m.) sessions.

## Morning:

- Agricultural
- Continuing Professional Development (CPE)
- Governmental Accounting & Auditing
- Health Care Services
- Not-For-Profit

## Afternoon:

- Business Valuation & Litigation Services
- Industry
- Legislation
- Membership
- Taxation
- Young CPA Liaison

## • The following committees have

**set alternate dates:** Accounting & Auditing; Advisory to State Board; Awards, Education & Scholarships (May 19); Banking (May 12); Firm Administration & Development; Insurance; Professional Conduct; and Long Range Planning.

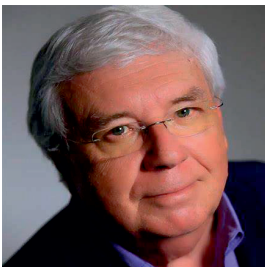
- Committees will plan their programs of work for the new year. Minutes will be reviewed by the Board of Governors at the August meeting.

## BOARD OF GOVERNORS MEETING

**May 8, 2025  
3:15 p.m.**

**MSCPA Training Center  
(Virtual Option Available)  
Ridgeland, MS**

# LEADERSHIP LUNCHEON GUEST SPEAKER



Walt Grayson

Walt Grayson is a distinguished Mississippi broadcaster and storyteller with a career spanning over five decades. Born and raised in Greenville, Mississippi, he began his broadcasting journey in high school, working part-time at a local radio station. In 1984, Grayson transitioned to television as a weekend weather anchor at WLBT-TV in Jackson. Over his 35-year tenure there, he became well-known for his feature reporting, particularly the “On The Road” segments that showcased stories from across Mississippi. In recent years, Grayson joined WJTV, Jackson’s CBS affiliate, where he serves as a weatherman, news anchor, and feature reporter.

Grayson has been the long-time host and segment producer for Mississippi Public Broadcasting’s “Mississippi Roads,” a program highlighting the state’s culture and history. He also contributes a monthly column to “Today in Mississippi,” sharing narratives that reflect his deep connection to the state.

An accomplished author, Grayson has written several books, including “Looking Around Mississippi” and its sequel, “Looking Around Mississippi Some More!” His contributions to broadcasting have been recognized with his induction into the Associated Press Mississippi Broadcasters Hall of Fame.

Grayson is married to his junior high school sweetheart, “Miz Jo,” and together they have four children and four grandchildren.



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# Member News



Tony Chance

## REMEMBERING PAST CHAIRMAN TONY CHANCE

1949-2025

**Tony Chance** passed away on March 18, 2025. He was born on April 21, 1949, and grew up in Columbia, MS. He graduated from Columbia High School in 1967 where he was a three-sport letterman and was voted Mr. CHS. He went on to attend the University of Southern Mississippi earning degrees in both finance and accounting. During his time there, he played on the USM baseball team coached by the legendary Pete Taylor and is listed in the record book there for playing every inning of every game for all four years.

After graduation, he joined the National Guard and served honorably for six years. On May 31, 1971, he married his high school sweetheart, Margaret Rochinski, and they enjoyed almost 54 years of marriage and three children together.

Tony began his career as a CPA in 1974 at Tann, Brown & Co. in Jackson and then moved to Forest in 1979 and became a sole practitioner under the name of Tony Chance and Company. In 2018, his firm merged and became Chance, Gay & Cieglo, PLLC. He was known to be an honest and dedicated CPA who gave attention to every detail. He considered each and every client to be a personal friend.

Tony was an active member and friend of the MSCPA. He served as President (now Chairman) in 2001-2002. Tony chaired the Insurance Trust Committee for over 20 years with dedicated commitment and served on the committee for many more years. Tony regularly attended the annual meeting in Sandestin where he and his wife typically participated in the tennis tournament.

He was a leader in the community, serving as President of the Chamber of Commerce, Forest Rotary Club where he was a Paul Harris fellow, and the Scott County Chapter of the USM Alumni Association. He also found time to play on championship Scott County softball teams in the 1980s. In 1985, Tony was selected by the U.S. Small Business Administration as the Mississippi Small Business "Accounting Advocate" of the Year, an award that was presented to him by Governor Bill Allain.

Tony will be remembered as a man of integrity and compassion who lived his faith daily and led his family by example. He will be missed.

## TAX SEASON BREAKAWAYS

Members and firms find ways to stay fresh during tax season.

**GranthamPoole** held their annual Cornhole Tournament. For the 4th consecutive season, Mike Hanson's team with Austin Hannabass and Jacob Plunkett, clinched the victory and the Cornhole Cup!

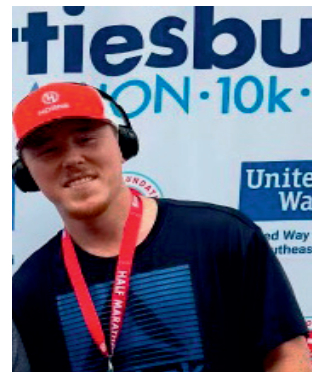
**HORNE** and **TMH** members participated in Hattiesburg's Half Marathon.



Mike Hanson, Austin Hannabass, & Jacob Plunkett



TMH: Shelley High, Renee Moore, Destiny Nolan, Jonathan Dawkins, Ariel McIlvoy and Hannah Nguyen.  
Not Pictured: Joseph Bost



Horne: Bradley Floore



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## ***FINAL BOI UPDATE!***

### **BOI Reporting for U.S. Companies and U.S. Persons No Longer Required**

On March 21, 2025, the U.S. Department of the Treasury and the Financial Crimes Enforcement Network (FinCEN) announced that U. S. companies and individuals are no longer required to report their ownership details under the Corporate Transparency Act (CTA). With this interim final rule (IFR), all U. S. based businesses are officially exempt from reporting ownership details to FinCEN.

However, **foreign** companies that now meet the definition of a “reporting company” and do not qualify for an exemption must still report their ownership by new deadlines. With limited exceptions, the interim final rule still requires most foreign companies to report their ownership details, but it extends the deadline. Foreign entities registered before the IFR publication must file BOI reports within 30 days of that date. Foreign entities registered on or after the IFR’s publication must file within 30 calendar days of receiving notice that their registration is effective.

This final ruling comes after many months of revolving injunctions and deadlines and nationwide advocacy efforts by state societies and the AICPA.

## **Amendment Clarifies CPAs’ Financial Statement Preparation Engagements**

Published: March 26, 2025 in AICPA’s Journal of Accountancy

The AICPA Accounting and Review Services Committee (ARSC) issued an amendment clarifying that a CPA preparing financial statements as part of a consulting services engagement performed in accordance with CS Section 100, Consulting Services: Definitions and Standards, is not required to apply AR-C Section 70, Preparation of Financial Statements.

Statement on Standards for Accounting and Review Services (SSARS), Applicability of AR-C Section 70 to Financial Statements Prepared as Part of a Consulting Services Engagement, will be effective for the preparation of financial statements for periods ending on or after Dec. 15, 2026, with early implementation permitted. It will amend SSARS No. 21, Clarification and Recodification, as amended, AR-C Section 70.

“The practical difference for CPAs is that if they perform the engagement outside of AR-C Section 70, the quality management standards do not apply, and the engagements are not included in the population subject to peer review,” said Mike Glynn, CPA, CGMA, AICPA associate director—Audit & Attest Standards and ARSC staff liaison.

The project arose from questions regarding whether AR-C Section 70 is required to be applied in situations in which controllership or CFO services are performed under the consulting standards and financial statements are created as part of that. Because financial statement preparation is not an attest service, ARSC determined that excluding such engagements would not adversely affect the public interest.

CS Section 100 states that the general professional standards of professional competence, due professional care, planning and supervision, and sufficient relevant data apply to consulting services. Furthermore, in such situations, practitioners are required to follow the AICPA Code of Professional Conduct.



*Written By: Bryan Strickland*



# LUNCH AND LEARN LIVESTREAM SERIES



## JIM MARTIN'S SERIES: CPE THAT YOU CAN USE

**12:00 – 1:40 p.m.      2 Credit Hours**

**April 30 – CPA's CAN Go to Jail for Ethical Lapses**

**July 16 – 2025 Federal and State Income Tax Update for the Local Practitioner**

**August 20 – 2025 Compilation, Preparation and Review Update**

**Nov 12 – 50 Reasons to Fire a Client**

**Dec 10 – 2025 Federal and State Income Tax Update for the Local Practitioner**

## HOT TOPICS: MANAGEMENT OF ACCOUNTING PRACTICE/FIRM ADMINISTRATION

**MAY 7 - AUGUST 6 - NOVEMBER 5**

**11:00 A.M. - 12:00 P.M. 1 HOUR CREDIT**

**JOIN OTHER MANAGING PARTNERS, FIRM LEADERS, AND FIRM ADMINISTRATORS FOR  
THESE INTERACTIVE SESSIONS TO DISCUSS HOT TOPICS IN MANAGING YOUR  
ACCOUNTING PRACTICE.**



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# Should Clients Be Nervous About Stock Market Bubbles?

They say the stock market climbs a wall of worry. There are always plenty of people on TV who warn of risks facing the stock market. Your client has expressed these concerns to you. How do you react?

We know “time in the market” has generally performed better than timing the market. Clients might be worried “this time it’s different.”

## *What points might you raise with them?*

1. Are they investing for the long term? The answer is probably yes. If the cash they have invested in stocks represents this year’s college tuition bill for their children, then they are short-term investors. If the bill is payable in August, they have a problem if the stock market is significantly lower then.

2. Are they using borrowed money? If your client is heavily leveraged on margin, they have a serious problem if the stock market goes down. The overall value of the portfolio declines, but their loan stays the same. (It actually grows because of accumulating interest.)

## *Let us assume neither of these is a problem. Your client is invested for the long term and there is no leverage.*

1. What does your firm say? Do you have a research department? If so, this is expertise the client is paying for through their fees. Share what they are thinking.

2. Has the firm revised the model portfolios? Have they recommended reducing stock exposure? Increasing bonds? It is possible, but unlikely.

3. Is your client overweighted in equities? You compare their allocation vs. the recommended model from time to time. Regardless of if there is talk of a bubble or not, you would suggest bringing their portfolio in line with the model aligned to their risk tolerance profile. This would be a reason to lighten up on equities.

4. Are they using managed money? If the answer is yes, someone else is driving the bus. If the money managers think it is time to lighten up, they should be doing it.

5. Are they utilizing dollar cost averaging? This might be how their 401(k) gets funded at work. You might talk with them about putting their tax refund check or annual bonus to work during the year. If this is the case, your client is buying over a continuous period of time.

6. Is your client reinvesting dividends? This is another form of dollar cost averaging. The money is staying in the portfolio. It is buying more shares at different times in the market cycle.

7. Are they invested 100% in stocks? Probably not. They likely have a portfolio that is allocated between stocks, bonds and cash. Maybe just stocks and bonds. In theory, the bonds act as shock absorbers.

8. Do they only own one stock? If they only invested in one stock or one sector, they have the risks that come along with a concentrated position. This is unlikely. As their advisor, you have either recommended a diversified portfolio, a group of mutual funds or several money managers. Their holdings are diversified.

9. Do they own a stock index tracker fund? If they own a fund that tracks the S&P 500 index for example, the index has 11 sectors. If certain sectors might be considered “toppy” others might not.

10. Is all their monetary wealth in stocks? Probably not. They likely have money in certificates of deposit, their checking account, money funds and other vehicles.

11. Do they own other assets besides financial ones? Does your client own real estate? That represents part of their overall wealth. Do they own precious metals? Do they own art, jewelry or anything in the alternative asset category? Their wealth is not exclusively in the stock market.

12. Are they invested internationally? The U.S. stock market is not the only stock market. The U.S. represents about 49% of global stock market capitalization. Markets are cyclical. Different markets around the world might be in different parts of their cycle.

If your client is significantly diversified and has a long-term time horizon, there are fewer reasons for them to be worried when compared to the “do-it-yourself” investor who only owns a couple of stocks and holds concentrated positions.



*Written By: Bryce Sanders*

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# State Board Meets on Mississippi College Campus

On March 20, the School of Business at Mississippi College hosted the Mississippi State Board of Public Accountancy for their meeting. The Board addressed key regulatory matters and signed CPA certificates for new CPAs. Both MC faculty and students attended, with students having the unique chance to engage with Board members for insights into the profession. A wonderful post meeting luncheon capped off the event with approximately 30 more students joining. Special thanks to Professor Billy Morehead for organizing this successful event.



School of  
Business



Board members, staff, MSCPA, MC faculty and Provost

# UPCOMING ETHICS COURSES

The Mississippi State Board of Public Accountancy requires that each CPA must have obtained and report online a minimum four CPE credit hours in Board approved Ethics, Professional Conduct, Public Accountancy Law and Regulations courses triennially – current period: July 1, 2022, through June 30, 2025. A minimum of one of these Ethics CPE credit hours must be in the subject of Mississippi Public Accountancy Rules. MSCPA can help you meet the requirement!

## 1 Hour MS Rules and Regulations

May 2nd

**CREDITS:** 1 MS Rules

**MEMBER PRICE:** \$40 • **NON-MEMBER PRICE:** \$60

*Attend In-Person or via Livestream at the MSCPA in Ridgeland, MS*

## Ethics, Rules, and Regulations

May 12th, June 12th, June 18th (Convention), & June 27th

**CREDITS:** 3 Ethics / 1 MS Rules

**MEMBER PRICE:** \$165 • **NON-MEMBER PRICE:** \$205

*Attend In-Person or via Livestream at the MSCPA in Ridgeland, MS*

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tresa@cpcmetro.org  
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cpcmetro.org





# MSCPA 2025 Annual Convention

June 18-22, 2025 • Sandestin Golf and Beach Resort | Destin, FL

MSCPA's Annual Convention is the avenue to promote fellowship among the members. The Officers and Board of Governors welcome members, their families and guests and invite you to enjoy a program planned with activities for everyone. This year's theme is *Stars, Stripes and Strategic Solutions*.



Photo Credit: Sandestin Golf and Beach Resort



## REGISTER NOW

Registration helps the Society plan for this event more accurately. Please register early! You could win a **FREE** Convention registration!

**Earn up to 16 hours of CPE on Wednesday and Thursday**

### Current Challenges and Crucial Skills for CPAs

Wednesday, June 18 • 8:30 a.m. – 12:00 p.m.

#### Exploring Ethics

Wednesday, June 18 • 1:00 – 4:30 p.m.

#### Unmasking Fraud: A Deeper Dive

Thursday, June 19 • 8:30 a.m. – 12:00 p.m.

#### Survive and Thrive Against Pressing Hazards and Customer/Employee Issues

Thursday, June 19 • 1:00 – 4:30 p.m.

Members who register and attend on Friday morning will have the opportunity to earn 2 additional hours of CPE.

## ACCOMMODATIONS DISCOUNT

MSCPA has reserved a block of rooms at the Sandestin Resort. Book directly with Sandestin before the cut-off on **May 23** to secure your room using the group code **25126G**.

Call: **1-800-320-8115** • Book Online: <http://www.Sandestin.com/25126G>

Beachside Studio*	\$339	Village 1 Bedroom	\$279
Beachside 1 Bedroom*	\$409	Village 2 Bedroom	\$389
Beachside 2 Bedroom*	\$539	Grand Complex Studio	\$250
Osprey Pointe 3 Bedroom	\$675	Grand Complex Studio QQ	\$250
Westwinds 1 Bedroom*	\$419	Grand Complex 1 Bedroom	\$289
Westwinds 2 Bedroom*	\$569	Grand Complex 2 Bedroom	\$425
Westwinds 3 Bedroom*	\$719	Grand Complex 3 Bedroom	\$519
Lakeside 2 Bedroom	\$345	Luau Studio	\$259
Bayside 1 Bedroom Suite	\$219	Luau 1 Bedroom	\$289
Bayside 3 Bedroom Villa	\$409	Luau 2 Bedroom*	\$389
Village Studio	\$240	Luau 3 Bedroom*	\$505

\*A minimum stay of 5 nights is required on Beachfront accommodations; a minimum stay of 4 nights is required in Luau 2- and 3-bedroom accommodations. Village units consist of accommodations in Observation Point North and South, Market Street Inn, and Pilot House. The Grand Complex consists of accommodations in the Grand Sandestin, Lasata, Bahia, and Elation.

## Register for Convention Today!

To register for convention, visit  
**[www.ms-cpa.org](http://www.ms-cpa.org)**  
 or see page 17.



# SANDESTIN'S FOOD TRUCK FRIDAY

WHEN:

CONVENTION - FRI, JUNE 20, 2025

4PM - 8PM

WHERE:

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# MSCPA 2025 Annual Convention

June 18-22, 2025 • Sandestin Golf and Beach Resort | Destin, FL

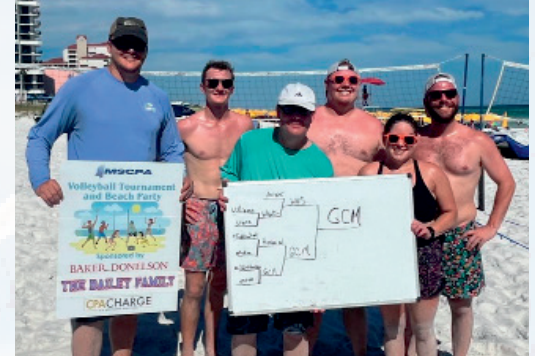
## HIGHLIGHTS

### VOLLEYBALL

Who will take home the Bailey Trophy this year? We are looking for teams to participate in our 10th annual volleyball tournament on Saturday, June 21, at convention. **Gather up your co-workers, colleagues, family or friends and email Karen Moody, [kmoody@ms-cpa.org](mailto:kmoody@ms-cpa.org), to sign up your team of 6 players or more by Saturday, June 21st at 9am.** We do not need individual/player names at this time, just team names!

Individual players will also be able to sign up to be added to a team. The winning team will house the trophy during the coming year, and team players will receive medals.

Join us at the beach party on Saturday afternoon in Sandestin. There will be tents, drinks, and sponsor giveaways!



**2024 Winning Team:**  
Gillon Christian Mosby, PLLC



### BACK BY POPULAR DEMAND: PICKLEBALL

Pickleball, often described as a blend of tennis, badminton, and ping pong, is renowned for its accessibility and versatility. Whether you're a seasoned athlete or a curious newcomer, Pickleball offers a fun and engaging experience for participants of all ages and skill levels.

Join us for a doubles Pickleball Tournament at this year's convention on Friday, June 20! We invite you to dive in, embrace the thrill of the game, and make

unforgettable memories with us. Let's pickle!

### DRAWDOWN INCREASED TO \$2,000

Get ready for an electrifying evening at Saturday's dinner during the convention, featuring our thrilling \$2,000 drawdown! Will you be the lucky winner to take home the jackpot? Join us for an unforgettable night with background music by The Voice contestant Jared Herzog, delicious food, great company, and the chance to win big.



### NEW! MAGIC MIRROR PHOTOBOOTH

Capture the moment like never before with our brand new Magic Mirror photo booth debuting at Thursday night's reception during the convention! Step up and let the magic unfold as you strike a pose. Don't miss out on this exciting addition to our event – it's sure to be a highlight of the evening!





## DELOITTE CONTRIBUTES TO MSCPA OUTREACH

Deloitte has once again demonstrated their commitment to supporting state CPA societies by donating **\$5,000** to the MSCPA. These funds are designated for student and young professional outreach, aligning with our strategic plans to tackle pipeline challenges. In addition to this contribution, Deloitte has previously supported our endeavors with \$5,000 each in 2022, 2023, and 2024 for student outreach, and in 2021 for our Diversity, Equity, and Inclusion (DE&I) initiatives.

*We extend our sincere gratitude to Deloitte for their ongoing generosity and support!*

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## MSCPA 2025 Annual Convention:

**REGISTRATION FORM** June 18-22, 2025 • Sandestin Golf and Beach Resort | Destin, FL**PRIMARY REGISTRATION**

As a member, is this the first time you have attended the MSCPA Annual Convention? \_\_\_\_ Yes\* \_\_\_\_ No

Name \_\_\_\_\_ Company \_\_\_\_\_

Address \_\_\_\_\_ City/State/Zip \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

For planning purposes, will the registered member and spouse/guest attend Saturday night's banquet? \_\_\_\_ Yes \_\_\_\_ No

\_\_\_\_ \*MEMBER FIRST TIME ATTENDEE GENERAL REGISTRATION (approved for 2 CPE credits)..... \$275

Includes welcome reception, three breakfasts, two speaker presentations, Friday box lunch,  
Saturday beach party/volleyball tournament, reception, banquet, and special entertainment.

\_\_\_\_ GENERAL REGISTRATION ..... \$335

Includes welcome reception, three breakfasts, two speaker presentations (approved for 2 CPE credits),  
Friday box lunch, Saturday beach party/volleyball tournament, reception, banquet, and special entertainment.

\_\_\_\_ SPOUSE/GUEST REGISTRATION ..... \$175

Includes welcome reception, three breakfasts, Friday morning demonstration/prizes, Friday box lunch,  
Saturday bingo/prizes, beach party/volleyball tournament, reception, banquet, and special entertainment.

Spouse/Guest Name: \_\_\_\_\_

\$ \_\_\_\_\_  
SUBTOTAL**CPE SEMINAR SELECTION**

\_\_\_\_ Wednesday, June 18 • 8:30 a.m. – 12:00 p.m. • CPE Credit: 4 ..... \$165

Current Challenges and Crucial Skills for CPAs, Bob Mims

\_\_\_\_ Wednesday, June 18 • 1:00 – 4:30 p.m. • CPE Credit: 4 ..... \$165

Exploring Ethics, Wil Crawford

\_\_\_\_ Thursday, June 19 • 8:30 a.m. – 12:00 p.m. • CPE Credit: 4 ..... \$165

Unmasking Fraud: A Deeper Dive, Wil Crawford

\_\_\_\_ Thursday, June 19 • 1:00 – 4:30 p.m. • CPE Credit: 4 ..... \$165

Survive and Thrive Against Pressing Hazards and Customer/Employee Issues, Bob Mims.....

\$ \_\_\_\_\_  
SUBTOTAL**ACTIVITIES Spouses and Guests Welcome! Cash Prizes Will Be Awarded!**

\_\_\_\_ Golf Tournament: Friday, June 20 ..... \$85

Includes green fee, cart fee, tournament registration, and refreshments. Reservation must be received  
by May 31 to guarantee availability. Tee time is offered on a space available basis after cutoff date.

Player(s) and Handicap(s): \_\_\_\_\_

\_\_\_\_ Deep Sea Fishing: Friday, June 20 (Children allowed) ..... \$55

Includes fishing license, bait, tackle, fish cleaning, and refreshments on board the Destin Princess.  
Advance registration recommended. This trip usually sells out!

Participant(s): \_\_\_\_\_

\_\_\_\_ Pickleball: Friday, June 20 ..... \$40

Includes registration, paddles, balls, and refreshments.

Player(s): \_\_\_\_\_

\$ \_\_\_\_\_  
SUBTOTAL**CHILDREN'S EVENTS** Ages 4 to 12 years old • Registrations are required. Only register children attending these free activities.

\_\_\_\_ Thursday Evening: Arts, crafts, games, movie, and snacks ..... FREE

Number of Children Attending: \_\_\_\_

\_\_\_\_ Friday Morning: Lawn and pool party with games and snacks ..... FREE

Number of Children Attending: \_\_\_\_

\_\_\_\_ Saturday Evening: Carnival with entertainment, arts, crafts, games, movie, and dinner ..... FREE

Number of Children Attending: \_\_\_\_

\$ \_\_\_\_\_  
TOTAL AMOUNT DUERegister  
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EXP DATE \_\_\_\_ / \_\_\_\_ CVV \_\_\_\_\_ BILLING ZIP \_\_\_\_\_

SIGNATURE \_\_\_\_\_

**For planning purposes, registrations or cancellations are encouraged to be made by June 11, 2025. Cancellations/no shows on the date of the event forfeit the entire registration fee. To download a fillable and printable form, visit [www.ms-cpa.org](http://www.ms-cpa.org).**

# MS Technology Conference

Technology Conference with K2 Enterprises

Tuesday & Wednesday  
May 13-14, 2025

Earn up to 16 Credits!

**Member Cost: \$490**

**Nonmember Cost: \$620**

## AGENDA AT-A-GLANCE

### Tuesday, May 13

8:30 a.m. Tech Update 2025

10:10 a.m. Break

10:20 a.m. Breakout Sessions (Choose 1):

- CPA Firm Update
- Taking A Fresh Look At Teams
- Top Ten Productivity Booster Apps In Microsoft 365

12:00 p.m. Lunch Break

1:00 p.m. Breakout Sessions (Choose 1):

- Expense Reporting Automation
- Collaboration Tools And Best Practices
- Automation: Beyond The Basics With The Microsoft Power Platform

2:40 p.m. Break

2:50 p.m. Excel Tips: Best Practices & Features

4:30 p.m. Adjourn

*This conference will be presented in a **virtual only** format.*

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### Wednesday, May 14

8:30 a.m. Data Security And Privacy Issues And Solutions

10:10 a.m. Break

10:20 a.m. Breakout Sessions (Choose 1):

- Client Accounting Services For CPA Firms: Strategies For Growth And Success
- CRM: The Ultimate Business Automation Tool
- Taking Another Look At Power BI

12:00 p.m. Lunch Break

12:50 p.m. Breakout Sessions (Choose 1):

- What's New With QuickBooks
- AI: Better Prompts, Better Results
- Next Level Home Networking

1:40 p.m. Break

1:50 p.m. Breakout Sessions (Choose 1):

- After QuickBooks, What's Next
- AI: Security And Privacy Issues
- Ten PDF Tips You Need To Know

2:50 p.m. Ripped From The Headlines: Lessons From Interesting Tech Crimes

4:30 p.m. Adjourn

[www.ms-cpa.org](http://www.ms-cpa.org)



# Business & Industry Management Development Conference

May 20-21, 2025

In-Person & Livestream at the MSCPA in Ridgeland, MS

Member Price: \$355 • Nonmember Price: \$475

Credits: 16

## TUESDAY, MAY 20

- 7:45 a.m. **Breakfast and Networking**
- 8:30 a.m. **TBD**
- 9:30 a.m. **How to Make Your Audit go Smoothly: What every CFO Should Know**  
*Christina Bull, KPMG LLP; Kellie Shannon, KPMG LLP; Virginia Gamble, KPMG LLP*
- 10:40 a.m. **Talent Acquisition Trends in Accounting and Finance**  
*Brenda Barron, Professional Staffing Group*
- 12:00 p.m. **Lunch**
- 12:40 p.m. **Human Resources Update**  
*Melissa MacMillan, HORNE*
- 1:40 p.m. **Using Enneagram Personality Typology**  
*Elizabeth Casano, EBC Consulting LLC*
- 3:40 p.m. **Outlook for the Mississippi Economy**  
*Corey Miller, State Economist*
- 4:30 p.m. **Adjourn**

## WEDNESDAY, MAY 21

- 7:45 a.m. **Breakfast and Networking**
- 8:30 a.m. **Common Sense CFO: Dealing with Ever Changing Accounting and Strategic Demands**  
*Bob Mims, CPA*
- 10:20 a.m. **Presenting and Communicating in Today's Office Dynamic: Know the Facts Before You Start**  
*Bob Mims, CPA*
- 12:00 p.m. **Lunch**
- 1:00 p.m. **CPA or Detective?: CFOs and Non-Fraud Specialists on Conducting Internal Investigations**  
*Tracy Cooper, CPA*
- 3:10 p.m. **AI Today: A Practical, Evolving look at How CPAs can Use AI Tools Now to Improve Their Work**  
*Tracy Cooper, CPA*
- 4:30 p.m. **Door Prizes and Adjourn**



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# Accounting & Auditing Conference

**8:30 a.m. – 4:30 p.m.**

7:45 a.m. Breakfast and Networking

8:30 a.m. How to Make Your Clients' Financial Statements Come Alive and Spot Impending Cash, Profitability, and Productivity Issues  
Speaker: Ruth King, Financially Fit Business, LLC

12:00 p.m. Lunch

1:00 p.m. It's Time For Accounting Automation And Data Analytics  
Speaker: Thomas G. Stephens, K2 Enterprises

2:40 p.m. Break

2:50 p.m. How Accounting is More Than Just Debits and Credits  
Speaker: Donna M. Ingram, CPA

4:30 p.m. Adjourn

Thursday

**May 22, 2025**

In-Person & Livestream at the  
MSCPA in Ridgeland, MS

**Member**

**Price: \$225**

**NonMember**

**Price: \$300**

**Credits: 8**



# Spring Clusters

Pick & Choose from 10 Classes!

**6/9/2025**

Monday  
Ridgeland  
MSCPA

## **Evaluating Fraud Risk in a Financial Statement Audit (Virtual Speaker)**

**Discussion Leader:** Curtis Quickel

**Cost: Members:** \$165 **Non-Members:** \$205

**Course Hours:** 8:30am-12:00pm

**Level:** Basic **CPE Credit:** 4 **VENDOR:** Surgent **ACRONYM:** ARF4 / ARF4W

Course objectives and description: The Association of Certified Fraud Examiners says that there is fraud lurking in all businesses, including not-for-profit organizations. It often goes undetected for years and when uncovered, management and the board may question why an auditor did not identify it. The auditor's responsibility in a financial statement audit is to assess risk and perform sufficient procedures to obtain reasonable assurance that the financial statements are free from material misstatement due to fraud or error. However, failure to perform an adequate fraud risk assessment and report deficiencies in internal control, such as a lack of segregation of duties, can leave a firm vulnerable. This course will discuss the audit procedures that should be performed in accordance with AU-C §240 as recently amended, best practices in performing fraud risk assessment procedures, when and how to report control deficiencies noted in an audit, and the most frequent types of fraud found in small to mid-sized entities along with internal controls that could be implemented to help prevent and detect them. We will look at various cyber fraud schemes and how they might be prevented or detected, the use of analytics as fraud risk procedures, and assessments of fraud risk in a Single Audit.

**6/9/2025**

Monday  
Ridgeland  
MSCPA

## **Annual FASB Update and Review (Virtual Speaker)**

**Discussion Leader:** Curtis Quickel

**Cost: Members:** \$165 **Non-Members:** \$205

**Course Hours:** 1:00pm-4:30pm

**Level:** Intermediate **CPE Credit:** 4 **VENDOR:** Surgent **ACRONYM:** FUR4 / FUR4W

Course objectives and description: This course provides a detailed discussion on the key topics related to financial reporting, though in a summarized format. The course will focus on recent ASUs issued by the FASB with a concentration on issues of greatest significance to most accounting practitioners, including recently released ASUs. Specifically, the course will review recently issued FASB standards on leases and provide an update on ASC 842 and ASC 326 post-implementation items and other hot button accounting issues, such as what is on the FASB's technical agenda. This course is the place to go for a succinct but thorough update on the big topics impacting financial accounting and reporting.

**6/10/2025**

Tuesday  
Ridgeland  
MSCPA

## **Integrated Planning, Forecasting, and Budgeting for Organizational Success (Virtual Speaker)**

**Discussion Leader:** Curtis Quickel

**Cost: Members:** \$165 **Non-Members:** \$205

**Course Hours:** 8:30am-12:00pm

**Level:** Intermediate **CPE Credit:** 4 **VENDOR:** Surgent **ACRONYM:** PLF4 / PLF4W

Course objectives and description: Planning may be one of the most important assignments of the finance professional; however, it is often accomplished in a way that can harm the organization. In many cases, huge sums are spent only to have a planning document developed that does not serve to bring the company together, but rather causes internal division. In some situations the budget can actually harm both productivity and alignment. This course is designed to bring planning, budgeting, and forecasting together into one fully aligned process that is easier, more efficient, and fully engages all parts of the organization. Rather than the plan being owned by the finance department, it is owned and followed by everyone from the CEO to the entry-level employee.

**6/10/2025**

Tuesday  
Ridgeland  
MSCPA

## **Controller/CFO Update: Hot Topics Facing Today's Financial Professional (Virtual Speaker)**

**Discussion Leader:** Curtis Quickel

**Cost: Members:** \$165 **Non-Members:** \$205

**Course Hours:** 1:00pm-4:30pm

**Level:** Update **CPE Credit:** 4 **VENDOR:** Surgent **ACRONYM:** TCF4 / TCF4W

Course objectives and description: In today's rapidly changing world, finance professionals are required to wear many hats and are often the keys to the success of the organization. On one hand, they need to be abreast of the latest proven financial skills for making the best decisions, and on the other hand they need the best skills to motivate, manage, and lead people. Being pigeon-holed into one area or another is neither good for career building nor good for the organization. This reality has proven to be even more true with the advent of COVID-19. We'll cover the latest issues that all CFOs and controllers need to know about and provide how-to guidance to allow for immediate use in their organizations. The program is focused on organizational success and will concentrate on ways to manage risk and achieve greater productivity.



# Spring Clusters

- 6/11/2025 NEW**  
Wednesday  
Ridgeland  
MSCPA
- A Brief History of the Universe: But Mostly Business Entity Tax Treatment**  
**Discussion Leader:** Michael Carraway  
**Cost: Members: \$165 Non-Members: \$205**  
**Course Hours:** 8:30am-12:00pm  
**Level:** Basic **CPE Credit:** 4 **VENDOR:** MSCPA **ACRONYM:** BETT / BETTW  
Course objectives and description: Tax treatment of business entities has evolved over decades, as have the different types of entities themselves. Mike Carraway explores their similarities, key differences, limitations and resultant opportunities, with a little history included, including C corporations, S corporations, partnerships, LLCs, and wholly-owned unincorporated businesses. Attendees will gain a greater understanding of many of the key tax aspects of various business entity vehicles, including advantages and drawbacks.
- 6/11/2025 NEW**  
Wednesday  
Ridgeland  
MSCPA
- Fiduciary Tax: What You Didn't Know You Need to Know**  
**Discussion Leader:** Jessica Cooley  
**Cost: Members: \$165 Non-Members: \$205**  
**Course Hours:** 1:00pm-4:30pm  
**Level:** Basic **CPE Credit:** 4 **VENDOR:** MSCPA **ACRONYM:** FTWD / FTWDW  
Course objectives and description: Whether you're new to fiduciary tax or seeking to refine your expertise, this course is packed with actionable knowledge that will elevate your understanding of fiduciary tax concepts. The session will allow attendees to gain practical insights into key tax reporting requirements for fiduciaries, navigate the complexities of income distribution deductions, further awareness of various trust types and related tax concepts, including special elections and rules as well as tax effects for beneficiaries.
- 6/12/2025 NEW**  
Thursday  
Ridgeland  
MSCPA
- In Person: Mississippi Board Rules & Regulations**  
**Discussion Leader:** Billy Morehead  
**Cost: Members: \$165 Non-Members: \$205**  
**Course Hours:** 8:30am-12:00pm  
**Level:** Update **CPE Credit:** 4 **VENDOR:** MSCPA **ACRONYM:** ERR-3 / ERRW-3  
Course objectives and description: This seminar satisfies the State Board's requirement for three hours of general ethics and one hour of Mississippi Rules and Regulations.
- 6/12/2025 NEW**  
Thursday  
Ridgeland  
MSCPA
- Leading with Internal Controls**  
**Discussion Leader:** Billy Morehead  
**Cost: Members: \$165 Non-Members: \$205**  
**Course Hours:** 1:00pm-4:30pm  
**Level:** Update **CPE Credit:** 4 **VENDOR:** MSCPA **ACRONYM:** LWIC / LWICW  
Course objectives and description: Strong internal controls help build efficient and effective organizations. Great leaders use internal controls to help guide dynamic organizations. No matter the person, how compelling the vision, or how brilliant the strategy is, without leadership grounded in strong internal controls, there is bound to be a failure in execution. Gaining buy-in, building trust, and inspiring loyalty are skills developed over time...often through the "School of Hard Knocks." A leader sets the "Tone at the Top" through actions, policies, values, influence, and day-to-day activities; a leader must learn how to communicate to stakeholders through authentic messages and powerful conversations. These skills are all grounded in strong internal controls. We will study the speaker's award-winning article, The Anatomy of a Fraud, to see the best practices of internal control every entity, especially smaller ones, can use to deter fraud. We will focus on serious and funny experiences over the speaker's 30+ year career in government financial management to connect the dots between leadership, building effective teams, and COSO & Green Book internal controls. (Will meet Yellow Book CPE requirements.)
- 6/13/2025**  
Friday  
Ridgeland  
MSCPA
- Surgent's Individual Income Tax Update (Virtual Speaker)**  
**Discussion Leader:** John Kilroy  
**Cost: Members: \$165 Non-Members: \$205**  
**Course Hours:** 8:30am-12:00pm  
**Level:** Update **CPE Credit:** 4 **VENDOR:** Surgent **ACRONYM:** BIT4 / BIT4W  
Course objectives and description: This highly informative course will bring you up-to-speed on the latest in individual tax law developments and the corresponding or responsive planning opportunities available to your clients. You will come away from the course ready to educate your individual tax clients and implement tax-savings ideas that will serve their ever-evolving needs. Continually updated to reflect enacted legislation.
- 6/13/2025**  
Friday  
Ridgeland  
MSCPA
- Key Partnership and S Corporation Tax Planning Strategies (Virtual Speaker)**  
**Discussion Leader:** John Kilroy  
**Cost: Members: \$165 Non-Members: \$205**  
**Course Hours:** 1:00pm-4:30pm  
**Level:** Intermediate **CPE Credit:** 4 **VENDOR:** Surgent **ACRONYM:** BTS4 / BTS4W  
Course objectives and description: Most of our clients are pass-through entities for which many of the general business strategies are subject to additional limitations. To provide the tax planning strategies for closely held business clients that will bring more revenue, this course focuses on the special concerns and techniques the practitioner needs to thrive in this market.



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