

President-Elect Stacy Thomas Names **Chairmen** for 2011-2012 Committees

President-Elect Stacy Thomas has selected Committee Chairmen to serve in the 2011-2012 fiscal year.

Accounting & Auditing.....	Jonathan Hagood, Tupelo
Advisory to State Board	Gary Walker, Ridgeland
Awards, Education & Scholarships	Karen Moody, Jackson
Business Valuation & Litigation Support	Jim Koerber, Hattiesburg
Continuing Professional Education.....	Gloria Crechale, Ridgeland
Firm Administration & Development	Beth Burgess, Flowood
Governmental Accounting & Auditing.....	Paige Johnson, Hattiesburg
Health Care Services	David Williams, Jackson
Industry	Daniel Wright, Jackson
Insurance Trust.....	Lance Mize, Brookhaven
Legislation	Tommy Butler, Ridgeland
Long Range Planning.....	Ed Jones, Pascagoula
Non-Profits	Charles Lindsay, Ridgeland
Peer Review	Charles R. Prince, Magee
Professional Conduct	Larry Lefoldt, Ridgeland
Taxation.....	Ted Edwards, Jackson

2011 MSCPA Convention June 23-26, 2011

The 2011 MSCPA Annual Convention is June 23-26, 2011 at the Sandestin Golf & Beach Resort in Sandestin, Florida. President Sim Mosby invites all MSCPA members and friends of the Society to attend.

Activities begin on Thursday, June 23 when exhibitors set up booths in the Baytowne Conference Center. Two four-hour CPE programs are offered to the membership with Dr. Quinton Booker of Jackson State University who will present a four-hour Ethics, Rules & Regulations Seminar Thursday morning and a four-hour Accounting & Auditing Update Thursday afternoon. A separate brochure with complete details is available on the two four-hour programs.

The convention registration desk opens at 1 p.m. Thursday on the second level of the Baytowne Conference

Center. The welcome reception starts at 7 p.m. in the Azalea Ballroom officially opening the meeting and members will be greeted by the current MSCPA officers.

Mark Peterson speaks at 9 a.m. on Friday.....

Mark G. Peterson is the Vice President of Congressional and Political Affairs at the American Institute of Certified Public Accountants (AICPA). In this position, he is responsible for key lobbying efforts on behalf of the AICPA. Prior to joining the AICPA, Peterson served as Vice President with the Alpine Group, where he was responsible for individualized lobbying work on tax, trade, agricultural, environmental, energy and related issues. He served a diverse group of clients, including major international technology

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Committees Meet **May 3** at MSCPA Building

MSCPA Committees will hold their Spring organizational meetings during morning (9-11 a.m.) or afternoon (1-3 p.m.) sessions on Tuesday, May 3 at the MSCPA Building in Ridgeland.

Committees on a morning schedule starting at 9 o'clock include Accounting & Auditing, Business Valuation, Continuing Professional Education, Firm Administration & Development, Governmental Accounting & Auditing, and Health Care Services.

The afternoon committee schedule starts at 1 p.m. and includes Industry, Insurance Trust, Legislation, Long Range Planning, Non-Profits, and Taxation.

The Awards, Education & Scholarships Committee will meet on Thursday, May 19 at 2 p.m. at the MSCPA Building.

Committees will plan their program of work for the new year. Minutes will be reviewed by the Board of Governors at the July meeting.

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*Published
by the
Mississippi Society of
Certified Public Accountants*

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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

New members include: Thomas Scott Adams, Sheila Franklin-Buie, Gordon Joseph Geter, Jason Bennett Mauffray, Kayla Paul-Lindsey, Carolyn Adams-Rossignol, and John Ryan Wingfield.

Now completing the membership process are:

Kathleen J. Joyce was born in Glens Falls, New York and received her BS in Accounting from Auburn University. She is an Accounting Consultant with Buchanan Lumber in Madison.

L. Yerger Lurate was born in Jackson and received his Bachelor of Accountancy from the University of Mississippi. He is the Manager of the Lurate CPA Firm, LLC in Ridgeland.

Mauri L. McKay was born in Tylertown and is applying as an Associate Member. She received her Bachelor of Science with a major in Accounting from the University of

Central Florida and is a Staff Accountant with Williams, Weiss, Hester & Co. in Jackson.

James Richard Peters was born in Osceola, Arkansas and received his BBA in Accounting from Northeast Louisiana University. He is the Owner of James R. Peters, CPA in Tupelo.

Lyn N. St. Leger was born in San Antonio, Texas and received her BBA from the University of Montevallo and MBA from William Carey University. She is the CFO of Marathon Medical Corporation in Commerce City, Colorado.

Arlene Kay Steele was born in Topeka, Kansas and received her BSBA with an emphasis in Accounting and an MBA from the University of Southern Mississippi. She is the Accounting Manager for BTN, Inc., D/B/A/ Boomtown Casino in Biloxi.

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Wednesday, June 22 - Sunday, June 26, 2011

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companies, energy companies, financial institutions, manufacturers and trade associations, as well as worked on several major policy coalitions on matters pending before the legislative and executive branches of government. Peterson has held several other positions in Washington that have included the role of Washington Representative for Toyota Motors North America, Director of Government and Regulatory Affairs for Andersen LLP in Washington and a Special Assistant to Speaker Newt Gingrich in the U.S. House of Representatives. He earned his Bachelor of Science degree in history from the University of North Dakota.

Val Steed discusses technology issues at 10:15 a.m.....

Val Steed graduated from Utah State University where he received both his Bachelors of Science (BS) in Accounting and his Masters of Accounting (MA). After college, Val worked for Deloitte Haskins and Sells of Salt Lake City,

Utah, and then with Hansen, Steed, Bradshaw & Malmrose P.C. of Salt Lake City. Val was with Hansen, Steed, Bradshaw & Malmrose P.C. for eleven years and was a shareholder for six years before leaving to start K2 Enterprises. Currently, Val is the CEO of K2 Enterprises which is a national technology training and consulting organization. He has twelve years experience in public practice and has been involved with information systems and the accounting technology industry since 1984.

Following the morning presentations, members are free to enjoy an afternoon of relaxation or may choose to participate in the golf tournament on the Baytowne Course or aboard the Sweet Jody for an afternoon of fishing. A box lunch will be provided after the last speaker concludes.

Annual Business Meeting Starts at 9 a.m. on Saturday.....

The Annual Business Meeting will be called into session at 9 a.m. on Saturday by President Mosby. Officers for the

2011-2012 fiscal year will be elected and reports from the Secretary, Treasurer, Insurance Trust Chairman, Legislation, and the Mississippi State Board of Public Accountancy will be presented. Members who have won the Outstanding Educator and Public Service Awards will also be honored. CPA Exam Medal Winners will also be recognized.

Editorial Cartoonist Marshall Ramsey speaks at 11 a.m on Saturday:

Marshall Ramsey, 39, is the editorial cartoonist for The Clarion-Ledger. He is a two-time Pulitzer finalist and is nationally syndicated by Copley News Service. His cartoons have appeared in USA Today, Newsweek, U.S. News and World Report, The Chicago Tribune, The New York Times and on his Mother's refrigerator. Ramsey is a 1991 graduate of The University of Tennessee. His collegiate cartoons won the John Locher Memorial Award, the top prize awarded to college editorial cartoonists. He has also illustrated several books, including six children's books for

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AICPA Council Explores Joint Venture to Offer New Management Accounting Designation, Reinforce Value of CPA Worldwide

The AICPA and the London-based Chartered Institute of Management Accountants (CIMA) are exploring the development of a new designation for management accounting, while supporting and promoting the U.S. CPA as the worldwide standard of professional excellence in accounting.

The pathways for obtaining the new credential would vary. Recognizing the significant educational and professional background of U.S. CPAs, AICPA voting members with at least three years working in management accounting or a financial management role would qualify for an accelerated route to obtaining the new designation. Non-voting AICPA members in the United States would not be eligible to obtain the credential.

Membership in both the AICPA and the state society delivers benefits for member CPAs as designation-holders would receive a significant discount on

their annual credential fee.

The proposed new designation would draw on an exacting code of conduct and ethics and a rigorous pathway for entry, and would demonstrate a combined competency and expertise in management accounting, and global financial and business management. CPAs holding the new designation would be further distinguished as corporate finance professionals, combining management accounting with a broad spectrum of financial expertise in corporate and public accounting.

The proposed new designation would be issued by a joint venture on behalf of the AICPA and CIMA, with membership remaining with the existing organizations. AICPA President and CEO Barry Melancon, CPA, said: "High-quality management accounting professionals who combine expertise with a deep commitment to ethics and

integrity serve the public interest. This joint venture would help produce and recognize professionals around the world committed to excellence in management accounting, enterprise and performance strategy."

The proposed new designation and the supporting joint venture are consistent with the AICPA's goals to promote the U.S. CPA broadly, advance the resources available for management accountants, create new global networking opportunities for members, and provide an enhanced platform for advocacy on behalf of the profession and the public interest. CIMA has approximately 180,000 members and students in 168 countries outside the United States. Collectively, the AICPA and CIMA represent the interests of 550,000 professional members. CIMA, which has 29 offices around the world, would promote the U.S. CPA as well.

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financial expert Dave Ramsey and one for chef and author Robert. St. John. He's a dad, husband and an amateur blogger.

Free Time Saturday Afternoon

Members return from a free afternoon for a reception and dinner in the Conference Center. President Mosby will introduce newly elected officers and the traditional exchange of gavel will be made as President-Elect Stacy Thomas nears the beginning of his term.

Prayer Breakfast Closes Convention Sunday morning.....

The traditional Sunday morning Prayer Breakfast, very popular with members and well attended, will close the 2011 meeting.

Special for Spouses: On Friday morning at 9 o'clock, an informal breakfast buffet will be served for Spouses. This will be held on the Second Level of the Baytown

Conference Center. And on Saturday starting at 9 a.m., bingo will be held in the conference center with prizes made possible by the MSCPA Chapters.

Our Members in the News

Gloria Crechale, CPA, joined Fox/Everett, Inc. in their Ridgeland office on Dec. 1 as Director of their Retirement Plan Consulting and Administration (RPCA) department. Fox/Everett, founded in 1945, is the largest independently owned insurance agency in Mississippi offering insurance and healthcare plan services along with third-party retirement plan administration, design and consulting services. As Director of RPCA, Gloria will be responsible for the department's daily operations in addition to continuing to work with clients and their other trusted advisors in the plan administration and document consulting areas. Prior to joining Fox/Everett, Gloria was a shareholder in the CPA firm of Burgess-Crechale, P.A.

AICPA COUNCIL

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Under the terms of the proposed agreement, the venture provides for equal decision-making through a 50:50 board of directors, with CIMA and AICPA rotating the role of chairman. The new joint venture would be 60 percent owned by the AICPA.

In the Americas outside the U.S., non-CPAs could obtain the new designation as AICPA international associates after a rigorous assessment process. Outside of the Americas, candidates would use the education and examination process established by CIMA. Candidates who earn the new designation under CIMA's jurisdiction would be CIMA members.

AICPA governing Council members attending the Regional Council meetings provided feedback on this landmark initiative. Council will be asked to vote on proceeding with the designation and a joint venture with CIMA at its May meeting.

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CONTINUING PROFESSIONAL EDUCATION

MAY 2011

May 6, 2011

Friday
Jackson
Capitol Club

YOUNG CPA SPRING CONFERENCE

Discussion Leader: Panel

Cost: Members: \$100 Non-Members: \$100 AICPA Member Discount: \$0

Course Hours: 8:00 – 4:00

LEVEL: All **CPE Credit:** 6 **VENDOR:** n/a **ACRONYM:** YCPAC

COURSE OBJECTIVES AND DESCRIPTION: Please watch the newsletter and web site (www.ms-cpa.org) for details.

May 9 & 10, 2011

Monday-Tuesday
Jackson
Hilton

MISSISSIPPI TECHNOLOGY CONFERENCE

Discussion Leader: Panel from K2 Enterprises

Cost: Members: \$395 Non-Members: \$545 AICPA Member Discount: \$0

Course Hours: 8:00-4:00

LEVEL: All **CPE Credit:** 16 General **VENDOR:** K2 Enterprises **ACRONYM:** MTC

COURSE OBJECTIVES AND DESCRIPTION: Please watch the newsletter and web site (www.ms-cpa.org) for details.

May 11, 2011

Wednesday
Ridgeland
MSCPA Center

Audits of 401(k) Plans

Discussion Leader: Bill Felder, CPA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Basic **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** AFKP-1

COURSE OBJECTIVES AND DESCRIPTION: 401(k) plans have become a popular option for employee benefit plans, so you must have the skills to audit these plans effectively. Every aspect of how to audit a 401(k) plan and prepare financial statements that satisfy ERISA and SEC requirements are covered in this course. Tap into ways to plan and conduct 401(k) audits more efficiently and effectively, and understand the differences between 401(k) audits and other employee benefit plan audits. Upon completion of this course, participants will be able to: plan and conduct 401(k) audits, including those with voice-response recordkeeping systems, more efficiently and effectively; Recognize new developments affecting 401(k) audits. **HIGHLIGHTS:** Audit planning – analytical procedures, accounting estimates, fraud; Evaluating internal control; Auditing the statement of net assets available for benefits; Auditing the statement of changes in net assets available for benefits; Special audit considerations; Preparing the auditor's report; Financial statement disclosures; and more.

May 12, 2011

Thursday
Ridgeland
MSCPA Center

Mississippi Sales and Use Tax Update

Discussion Leader: Greg Duke, CPA

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: TBA

LEVEL: Update **CPE Credit:** 4 Tax **VENDOR:** Miss. Department of Revenue **ACRONYM:** MSUT

COURSE OBJECTIVES AND DESCRIPTION: Details on this seminar are available at www.ms-cpa.org.

May 13, 2011

Friday
Jackson
Hilton

ACCOUNTING AND AUDITING CONFERENCE

Discussion Leaders: Dr. Kim Burke and Kurt Oestricher, CPA

Cost: Members: \$175 Non-Members: \$250 AICPA Member Discount: \$0

Course Hours: 8:00-4:00

LEVEL: Update **CPE Credit:** 8 A&A **VENDOR:** n/a **ACRONYM:** AAC

COURSE OBJECTIVES AND DESCRIPTION: Please watch the newsletter and web site (www.ms-cpa.org) for details.

May 16, 2011

Monday
Hattiesburg
Convention Center

S Corporation Key Issues, Compliance, and Strategies: An IRS Target Area

Discussion Leader: Jan Lewis, CPA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Basic **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** SCORP-1

COURSE OBJECTIVES AND DESCRIPTION: Once again this is the darling for many businesses; find out why during this information-packed session. Practical real-life examples give you ideas to apply immediately for your S Corporation clients. Review the advantages of the S Corporation tax rules, and minimize your client's tax bill with the latest business and tax strategies that make S Corporations so popular. Comply with the unique tax reporting rules for completing Form 1120S. Decide if an S Corporation is your client's entity of choice. **HIGHLIGHTS:** How to elect S Corporation status and how and when to terminate; Avoiding built-in gains, excess net passive income and business credit recapture; Tax considerations in the distribution of S Corporation earnings and profits; Reporting and filing requirements; Pass-through rules - selecting the most advantageous allocation method; Applying for the fiscal year most beneficial to the client; and Preparing the 1120S - hints to make the return preparation easier.

May 16, 2011

Monday
Hattiesburg
Convention Center

Advanced Update for Compilation, Review and Accounting Services

Discussion Leader: Jim Crockett, CPA, DBA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Advanced **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** RPCR-1

COURSE OBJECTIVES AND DESCRIPTION: If you manage a compilation, review and accounting service practice, this course is an absolute must; it enables a partner to ensure that current year engagements conform to all applicable professional standards. A practice-oriented review of the latest developments, cases, and lively discussion among the experienced participants make this class informative and practical. The material covers the entire spectrum of partner concerns: current professional standards, independence rules, engagement and representation letters, field work, disclosure, reporting, documentation, quality control, engagement administration, specialty engagements and peer review.

May 16, 2011

Monday
Ridgeland
MSCPA Center

Planning for Profits - How to Develop and Execute an Effective Business Plan

Discussion Leader: Jack Park, CPA, CSP

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$0

Course Hours: 9:00-5:00

LEVEL: Basic **CPE Credit:** 8 General **VENDOR:** Financial Insights **ACRONYM:** PFP

COURSE OBJECTIVES AND DESCRIPTION: Business Planning is a process by which an organization envisions its future and develops the required plans and procedures to accomplish that vision. Developing this unified sense of direction is essential for success, yet for most organizations it is frequently overlooked. This seminar strongly focuses on EXECUTION and implementation of the business plan — too many excellent plans are never achieved. Envisioning is more than anticipating the future; it is a process through which the organization can “change” its future. A critical leadership skill is the ability to establish and implement the organization’s Strategic and Operational Business Plans. This seminar’s Primary Focus: Financial Leadership; Strategic Thinking; Strategic Planning; Operations Planning; and Financial Planning. CPAs in Public Accounting who want to enhance their ability to help their clients improve profitability will benefit from this seminar.

May 17, 2011

Tuesday
Hattiesburg **NEW**
Convention Center

49 Tax-Cutting Moves for Individuals

Discussion Leader: Peter Towle, CPA, JD, LL.M.

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** FNTC-1

COURSE OBJECTIVES AND DESCRIPTION: Walk away with 49 practical and up-to-date strategies to help your individual clients conserve cash by cutting taxes. This course lays out the ideas for you in a logical sequence so you can quickly identify the tax-saving moves that are most appropriate for your clients’ specific circumstances. Upon completion of this course, participants will be able to: Respond to tax-law and economic developments with up-to-date strategies that save taxes for individual clients; Suggest tax-smart moves that are appropriate in varying client circumstances; and Implement strategies for investors, retirement savers, homeowners, college savers, employees, self-employed individuals and seniors. **HIGHLIGHTS:** Tax-saving moves that work great in a down economy; Strategies that respond to a higher-tax environment; Tax-smart ideas for investors and retirement savers; Strategies for employees and self-employed individuals; Practical ideas for homeowners, college savers and seniors; The wonderfulness of Roth IRAs; and Tax-law changes and developments that benefit individual taxpayers while avoiding new pitfalls.

May 17, 2011

Tuesday
Hattiesburg **NEW**
Convention Center

FASB Review and Update: Common GAAP Issues Impacting All CPAs

Discussion Leader: Doug Logan, CPA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** FRU

COURSE OBJECTIVES AND DESCRIPTION: Are you looking for an intermediate level review and update of common GAAP issues important to all CPAs? This broad-ranging course covers FASB Statements and Interpretations and other authoritative guidance that apply to all companies. Emphasizing financial statement disclosures in addition to accounting methods, this course also presents implementation guidelines and disclosure illustrations from actual financial statements. Review reporting standards for the balance sheet, income statement and statement of cash flows to gain understanding of the FASB standards that have the greatest impact on accounting and financial reporting. Upon completion of this course, participants will be able to: Understand FASB standards that have the greatest effect on accounting and financial reporting. Apply recent FASB pronouncements for non-specialized companies, and Prepare disclosures. Highlights also include: Research and development, Leases, Debt, Accounting for income taxes, International accounting (IFRS), Income statement presentation and interim reporting, Statement of Cash Flows, Segment reporting, and Long-lived assets (interest capitalization and non-monetary transactions). Accountants in practice and industry who need an intermediate level review and update on recent financial pronouncements will benefit from this seminar.

May 17, 2011

Tuesday
Ridgeland
MSCPA Center

Leadership Secrets of Football's Master Coaches

Discussion Leader: Jack Park, CPA, CSP

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$0

Course Hours: 9:00-5:00

LEVEL: Basic **CPE Credit:** 8 General **VENDOR:** Financial Insights **ACRONYM:** LEFC

COURSE OBJECTIVES AND DESCRIPTION: There are multiple common threads between championship football teams and high performance organizations. Many of the high-impact strategies of America’s most successful football coaches can be adapted to improve an organization’s performance. This seminar focuses on: practical leadership techniques outside of the normal accounting function that will allow financial leaders to add value to the organization; The eight core competencies of Financial Leadership; The five-C’s of self-development; Building the winning organization — Vince Lombardi’s unique three-step process; The leadership philosophies and techniques of many outstanding football coaches, and how these methods can be used by CPAs to improve organizational performance; and much more. For more details on this seminar, click on the Vendor link under the Education tab at www.ms-cpa.org.

May 18, 2011

Wednesday
Hattiesburg
Convention Center

Governmental and Nonprofit Annual Update

Discussion Leader: Doug Logan, CPA
Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30
Course Hours: 9:00-5:00
LEVEL: Update **CPE Credit:** 8 A&A YB **VENDOR:** AICPA **ACRONYM:** GNAU-1

COURSE OBJECTIVES AND DESCRIPTION: Change is inevitable and at times overwhelming if you are unprepared. Ensure you are current in governmental and nonprofit accounting and auditing. This time-tested update course is designed to prepare you for the latest accounting and auditing developments affecting governments and nonprofits. Upon completion of this course, participants will be able to: Apply the most recent requirements of the GASB & FASB directed toward governments and nonprofits; Utilize a solid understanding of the latest developments in A-133 and Yellow Book requirements; and Perceive recent activities of the AICPA including GAAS requirements. **HIGHLIGHTS:** Yellow Book developments; Latest A-133 and OMB compliance supplement developments; Latest activities and standards issued by the AICPA relating to nonprofits and governments; and New requirements issued or pending by the FASB and GASB.

May 18, 2011

Wednesday
Hattiesburg
Convention Center

AICPA's Annual Business Law Update

Discussion Leader: Harris H. (Trip) Barnes, III, JD
Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30
Course Hours: 9:00-5:00
LEVEL: Update **CPE Credit:** 8 General **VENDOR:** AICPA **ACRONYM:** ABLU

COURSE OBJECTIVES AND DESCRIPTION: Lawsuits flow freely these days. Stay on top of business law developments to protect your company, firm or clients from common legal entanglements. Learn how to handle current employment issues, resolve business disputes, protect assets and avoid product-liability issues. This course draws on the background of commercial litigators, corporate lawyers, product-liability litigators and tax attorneys to present hot legal topics that managers face daily. It uses case studies based on actual legal situations to provide an interactive opportunity among participants. Upon completion of this course, participants will be able to: Protect patents, trademarks and copyrights; Limit officer and director liability; Avoid product liability situations; and Respond to regulatory trends; Highlights include: Current employment laws and regulations; Corporate and securities matters; What to worry about if you are a public company; Tort reform; Business tax issues; Choice of entity and business unit structure.

May 18 & 19, 2011

Wednesday - Thursday
Ridgeland
MSCPA Center

PROGRAM FOR MANAGEMENT DEVELOPMENT

Discussion Leader: Panel
Cost: Members: \$245 Non-Members: \$320 AICPA Member Discount: \$0
Course Hours: 8:30-4:30
LEVEL: All **CPE Credit:** 16 General **VENDOR:** n/a **ACRONYM:** PMD

COURSE OBJECTIVES AND DESCRIPTION: Please watch the newsletter and web site (www.ms-cpa.org) for details.

May 20, 2011

Friday
Ridgeland
MSCPA Center

Construction Contractors Advanced Issues

Discussion Leader: Andy Copeland, CPA
Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30
Course Hours: 9:00-5:00
LEVEL: Advanced **CPE Credit:** 8 A&A (5) Tax (2); other (1) **VENDOR:** AICPA **ACRONYM:** CCAI

COURSE OBJECTIVES AND DESCRIPTION: Many contractors have fallen victim to the rough construction economy. Along with the contractors, sureties are seeing record claims being filed on projects. Where does the surety get their information to make the risky decisions for contractors? The CPA. In this magnified environment, the CPA should have a thorough understanding of the construction industry and the professional standards that impact construction contractor engagement. Delve beyond the basics on many issues the construction industry brings to the accounting profession. Get hands-on advice on the accounting, audit and tax issues that make the construction industry a high-risk client. Be prepared to address difficult issues such as look-back calculations, measuring progress of construction contracts and overhead allocations. Enhance your skills today to reduce the risk of your next construction engagement. Upon completion of this course, participants will be able to: Recognize and apply changes in tax regulations on the construction industry; Evaluate and rework audit processes to avoid common deficiencies in construction engagements; Improve how construction contract issues are addressed. Highlights include: Proper election of change-of-accounting methods; Look-back calculation issues; Contract issues: combining, segmenting and measuring progress; Common audit deficiencies and how to avoid them; Accounting for materials joint ventures and overhead allocations; Internal controls for contractors: addressing change orders, accounting for equipment, claims and back charges; Alternative minimum tax adjustments; Tax planning strategies.

May 23, 2011

Monday
Ridgeland **NEW**
MSCPA Center

Fraud Alert! Prevention & Follow-up

Discussion Leader: Bill O'Brien, MBA, CPA
Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$0 **NEW**
Course Hours: 9:00-5:00
LEVEL: Intermediate **CPE Credit:** 8 A&A **VENDOR:** Executive Education **ACRONYM:** FA

COURSE OBJECTIVES AND DESCRIPTION: Fraud Alert! is one seminar you cannot afford to miss. Fraud will touch you in some manner, so prepare for the inevitable. A recent study by the Association of Certified Fraud Examiners estimated that fraud costs the economy in excess of \$650 billion per year (the equivalent of \$4,500 per employee). This same study estimated that normal audits discover only about 11% of frauds compared to 19% discovered by accident. This seminar will examine various types of frauds and discuss ways to prevent, detect and investigate these activities. The seminar will also examine the CPA's role as an expert witness. Topics Include: The Fraud Triangle; Fraud related interviewing techniques; and the use of financial statement analysis in fraud assessment. This seminar includes seven interactive exercises that will allow the participants to apply newly acquired knowledge in a real-time setting. For more details on this seminar, click on the Vendor link under the Education tab at www.ms-cpa.org.

May 23, 2011

Monday

Tupelo

BancorpSo. Conf. Cntr.

Governmental & Nonprofit Annual Update**Discussion Leader:** Doug Logan, CPA**Cost:** Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30**Course Hours:** 9:00-5:00**LEVEL:** Update **CPE Credit:** 8 A&A YB **VENDOR:** AICPA **ACRONYM:** GNAU-2

COURSE OBJECTIVES AND DESCRIPTION: Change is inevitable and at times overwhelming if you are unprepared. Ensure you are current in governmental and nonprofit accounting and auditing. This time-tested update course is designed to prepare you for the latest accounting and auditing developments affecting governments and nonprofits. Upon completion of this course, participants will be able to: Apply the most recent requirements of the GASB & FASB directed toward governments and nonprofits; Utilize a solid understanding of the latest developments in A-133 and Yellow Book requirements; and Perceive recent activities of the AICPA including GAAS requirements. **HIGHLIGHTS:** Yellow Book developments; Latest A-133 and OMB compliance supplement developments; Latest activities and standards issued by the AICPA relating to nonprofits and governments; and New requirements issued or pending by the FASB and GASB.

May 23, 2011

Monday

Tupelo

BancorpSo. Conf. Cntr.

MBA in a Day**Discussion Leader:** Ken Greenwood, MBA**Cost:** Members: \$240 Non-Members: \$315 AICPA Member Discount: \$0**Course Hours:** 9:00-5:00**LEVEL:** Intermediate **CPE Credit:** 8 General **VENDOR:** Surgent-McCoy **ACRONYM:** MBAD

COURSE OBJECTIVES AND DESCRIPTION: The purpose of this course is to help CPAs develop a complete business finance and management background. With this knowledge and these skills, CPAs in industry and public accounting can better manage all aspects of their own businesses while helping their clients make more informed business and financial decisions. Major Topics: Fundamentals of organization behavior; Decision making with statistics; Finance and investments; cash flow analysis; Marketing principles and concepts including; Production management; Macroeconomic and microeconomic concepts; and much more. This seminar is designed for CPAs in industry and public accounting who want to expand their knowledge of business management and finance and the principles of strategic business planning.

May 24, 2011

Tuesday

Ridgeland

NEW

MSCPA Center

Performance Analysis: Identify Profit Improvement Opportunities**Discussion Leader:** Bill O'Brien, MBA, CPA**Cost:** Members: \$240 Non-Members: \$315 AICPA Member Discount: \$0**Course Hours:** 9:00-5:00**LEVEL:** Intermediate **CPE Credit:** 8 A&A **VENDOR:** Executive Education **ACRONYM:** PA**NEW**

COURSE OBJECTIVES AND DESCRIPTION: Discover ways to make your company more profitable. This fast-paced, interactive seminar will teach you how to use operational auditing and performance analysis techniques to identify and implement cost saving opportunities through process reviews. This course will make the experienced financial manager and the professional operational auditor more efficient and value-added in their respective fields. Topics Discussed: Conduct operational and performance reviews; Use operational and performance auditing tools; Integrate a performance analysis program into your routine finance function; Link with the 9 step traditional operational auditing process; Use the Value Chain Analysis to evaluate business processes; Link SOX 404 to the analysis. This seminar includes five case studies including a performance analysis case. For more details on this seminar, click on the Vendor link under the Education tab at www.ms-cpa.org. **BRING A CALCULATOR**

May 24, 2011

Tuesday

Tupelo

BancorpSo. Conf. Cntr.

Accounting and Auditing Update**Discussion Leader:** Stan Clark, CPA, PHD**Cost:** Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0**Course Hours:** 8:30-12:00**LEVEL:** Update **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4AUAA1

COURSE OBJECTIVES AND DESCRIPTION: Keep abreast of the fast-paced changes in accounting and auditing. This course covers the most relevant pronouncements, exposure drafts and consensus reports recently issued in the accounting, auditing, compilation and review arenas. This training will help you identify and apply recently issued FASB statements, interpretations and technical bulletins. Learn how to assess the effect of current auditing standards and standards on accounting and review services from coverage of the latest issues at the AICPA, EITF and FASB.

May 24, 2011

Tuesday

Tupelo

BancorpSo. Conf. Cntr.

Ethics, Rules & Regulations**Discussion Leader:** Stan Clark, CPA, PHD**Cost:** Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0**Course Hours:** 1:00 - 4:30**LEVEL:** Basic **CPE Credit:** 4 Ethics **VENDOR:** Dr. Stan Clark **ACRONYM:** ERR-1

COURSE OBJECTIVES AND DESCRIPTION: This course satisfies the State Board's requirement for three hours of general ethics and one hour of Mississippi Rules and Regulations.

May 24, 2011

Tuesday

Tupelo

BancorpSo. Conf. Cntr.

The Complete Guide to Employment Issues - Reducing the Employer's Risk**Discussion Leader:** Ken Greenwood, MBA**Cost:** Members: \$240 Non-Members: \$315 AICPA Member Discount: \$0**Course Hours:** 9:00-5:00**LEVEL:** Basic **CPE Credit:** 8 General **VENDOR:** Surgent-McCoy **ACRONYM:** EIRE

COURSE OBJECTIVES AND DESCRIPTION: In a troubled economy, the employer-employee relationship is strained. CPAs as advisers and controllers need to understand the complex issues in dealing with employees. This course provides in-depth coverage of

the legal and tax issues associated with all aspects of employment. Major Topics include: Hiring and firing issues, Employment contracts, Independent contractors, Employment issues in the economy, Legal liability issues (Recognizing age discrimination, sex discrimination, FLSA issues, minimum wage, overtime, sexual harassment), Fringe benefit issues, and the Employee handbook. After attending this seminar, you will be able to identify the legal issues in hiring, evaluating, and firing employees; Be aware of the federal laws that curtail and employer in actions involving employees and applicants; and Understand the broad array of fringe benefits and compensation programs and the requirements they place on employers. For more details on this seminar, click on the CPE Vendor link under the Education tab at www.ms-cpa.org.

May 25, 2011

Wednesday

Ridgeland **NEW**

MSCPA Center

Common Frauds & Internal Controls for Revenue, Purchasing, & Cash Receipts

Discussion Leader: Glen Helms, PHD, CPA, CISA, CIA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

NEW

Course Hours: 9:00-5:00

LEVEL: Basic **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** CFIC-1

COURSE OBJECTIVES AND DESCRIPTION: Transactions that occur within an entity's revenue cycle (revenues and cash receipts) and the purchase cycle (purchases and cash disbursements) are common areas for misstatements (both unintentional and fraudulent). While business owners and managers instinctively know that controls are important, they sometimes have a very limited understanding of what controls are effective. Accountants are in a unique position to fill this knowledge gap and help establish a cost-effective system of controls to minimize fraud and other misstatements while getting the "biggest bang for your buck." Upon completion of this course, participants will be able to: Focus on common misappropriation of asset frauds in the revenue, purchasing, cash receipts and cash disbursements processes; Identify areas of greatest risk; Set up internal controls to mitigate various risks; and Develop an analysis process to ensure efficient and effective risk management.

May 25, 2011

Wednesday

Tupelo **NEW**

BancorpSo. Conf. Cntr.

49 Tax-Cutting Moves for Individuals

Discussion Leader: Peter Towle, CPA, JD, LLM

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

NEW

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** FNTC-2

COURSE OBJECTIVES AND DESCRIPTION: Walk away with 49 practical and up-to-date strategies to help your individual clients conserve cash by cutting taxes. This course lays out the ideas for you in a logical sequence so you can quickly identify the tax-saving moves that are most appropriate for your clients' specific circumstances. Upon completion of this course, participants will be able to: Respond to tax-law and economic developments with up-to-date strategies that save taxes for individual clients; Suggest tax-smart moves that are appropriate in varying client circumstances; and Implement strategies for investors, retirement savers, homeowners, college savers, employees, self-employed individuals and seniors. **HIGHLIGHTS:** Tax-saving moves that work great in a down economy; Strategies that respond to a higher-tax environment; Tax-smart ideas for investors and retirement savers; Strategies for employees and self-employed individuals; Practical ideas for homeowners, college savers and seniors; The wonderfulness of Roth IRAs; and Tax-law changes and developments that benefit individual taxpayers while avoiding new pitfalls.

May 25, 2011

Wednesday

Tupelo

BancorpSo. Conf. Cntr.

Fraud: Catching the Crooks Who Cook the Books

Discussion Leader: Ken Greenwood, MBA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$0

Course Hours: 9:00-5:00

LEVEL: Basic **CPE Credit:** 8 A&A **VENDOR:** Surgent-McCoy **ACRONYM:** CCCB

COURSE OBJECTIVES AND DESCRIPTION: Fraud is a growing problem that costs the U.S. hundreds of billions of dollars each year. The purpose of this course is to help participants understand the nature of fraud, profile who commits it and why, and learn how to prevent it from occurring and detect it when it does occur. **Major Topics:** Nature and elements of a typical fraud; Types of fraud (fraudulent financial reporting, misappropriation of assets, vendor fraud, customer fraud, and investment fraud); profile of the typical fraud perpetrator; Social forces contributing to fraud; Three-step fraud process: commit, conceal, convert to personal use; Opportunities that allow fraud to occur; Fraud prevention: a three-pronged approach; How fraud symptoms can help alert individuals when a fraud has occurred; Fraud-detection techniques; The collapse of Enron, WorldCom, Adelphia, etc.; The Sarbanes-Oxley Act of 2002; SAS 99; and more. Many real live cases of fraud are used to illustrate its concepts and preventative applications. This course is designed for anyone interested in learning how to prevent or detect frauds of all types.

May 26, 2011

Thursday

Ridgeland **NEW**

MSCPA Center

Uncovering Misappropriation Schemes

Discussion Leader: Glen Helms, PHD, CPA, CISA, CIA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

NEW

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** FE-MS

COURSE OBJECTIVES AND DESCRIPTION: Standard issuing bodies are making it clear: CPAs have a major role in the detection of fraud. Client perceptions that the CPA should discover fraud have not gone away. This course provides tips for identifying the misappropriation of assets and improving internal controls as a defense against fraud. Learn how to focus analytical and substantive tests on the flow of cash through the company, utilizing both financial and non-financial information. Upon completion of this course, participants will be able to: Identify critical signs of misappropriation of assets and Develop policies and procedures to prevent fraud. **Highlights include:** A framework for detecting misappropriation schemes; Fraud schemes: cash, inventory, fixed assets, payroll, disbursements; Following cash flows; Evaluating internal controls; and Fraud prevention. Accounting professionals, internal and external auditors, and public practitioners responsible for the quality and integrity of financial information will benefit from this seminar.

May 26, 2011

Thursday
Ridgeland
Holmes Comm. College

NEW**Nuts and Bolts of Estate Planning**

("Everything You Ever Wanted to Know But Were Not Interested Enough to Ask")

Discussion Leader: Nancy Hughes, JD

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$0

Course Hours: 9:00-5:00

LEVEL: Basic-Intermediate **CPE Credit:** 8 Tax **VENDOR:** n/a **ACRONYM:** NBEP

NEW

COURSE OBJECTIVES AND DESCRIPTION: Watch our web site for details on this must-have seminar.

May 27, 2011

Friday
Ridgeland
MSCPA Center

Financial Fraud, Forensics, and the CPA

Discussion Leader: Glen Helms, PHD, CPA, CISA, CIA

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 8:30-12:00

LEVEL: Intermediate **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4FFF

COURSE OBJECTIVES AND DESCRIPTION: SAS 99 and the Sarbanes-Oxley Act are now part of everyday life for financial managers and auditors in small and large companies alike. Efforts to grasp and manage the risks of financial reporting fraud and misappropriation continue to evolve, but much uncertainty remains about what works best. This dynamic program provides specific steps to help auditors and accountants fully meet fraud-handling expectations. The "how to" approach helps participants identify fraud exposures and risks and provides practical ideas on how to handle those exposures. Course materials, developed by a nationally known fraud expert, include examples of what can go wrong and how fraud is reflected in the records.

May 27, 2011

Friday
Ridgeland
MSCPA Center

Cash & Tax Basis Financial Statements: Alternatives to GAAP & Reporting Requirements

Discussion Leader: Glen Helms, PHD, CPA, CISA, CIA

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 1:00 - 4:30

LEVEL: Basic **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4CTB

COURSE OBJECTIVES AND DESCRIPTION: When there is a request to produce modified tax basis statements with disclosures omitted, are you confident your staff know what to do? They will after taking this course, which explains OCBOA statements as well as how the basis of accounting affects compilation, review and audit procedures and accountant or auditor reports.

May 31, 2011

Tuesday
Ridgeland
MSCPA Center

Advanced Issues in Mergers, Acquisitions & Sales of Closely Held Businesses

Discussion Leader: Peter Towle, JD, LLM

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 8:30-12:00

LEVEL: Advanced **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4PSAS

COURSE OBJECTIVES AND DESCRIPTION: Here's a topic with a lot of sizzle! There is typically no more financially important decision an owner makes than the purchase or sale of a business. Many skill sets are involved in this process and topics such as accounting, Tax, negotiations, business valuations, strategic thinking, finance, family businesses and group dynamics are covered here. Follow the real-life situations in this course, so you can be your clients' trusted strategic advisor. Upon completion of this course, participants will be able to: Understand transaction strategies and structure; Apply an effective process to establish transaction price; Master the common elements in negotiated transactions; Get better results through comparing asset and stock transactions; and Save a business for its employees or for the family.

May 31, 2011

Tuesday
Ridgeland
MSCPA Center

NEW**Practical Tips and Techniques for Dealing with the IRS**

Discussion Leader: Peter Towle, JD, LLM

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 1:00 - 4:30

LEVEL: Basic **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4DIRS

NEW

COURSE OBJECTIVES AND DESCRIPTION: Are you prepared to face the IRS all the way from preparing a client's return through the audit and collection processes? Gain practical insights on everything needed to choose or reject a tactic when dealing with the IRS. Represent your client with confidence and evaluate your client's options. Upon completion of this course, participants will be able to: Deal effectively with the IRS from basic to major issues; Evaluate pros and cons of installment agreements, offers in compromise and other strategies; and Identify the latest legislative, judicial and administrative developments.

MAJOR EVENTS IN MAY**Young CPA Conference**

May 6 – Capitol Club, Jackson

Mississippi Technology Conference

May 9 & 10 - Hilton, Jackson

Accounting & Auditing Conference

May 13 - Hilton, Jackson

Hattiesburg Cluster

May 16 – 18 – Convention Center

Program for Management Development

May 18 & 19 - MSCPA Center,
Ridgeland

Tupelo Cluster

May 23 - 25 - BancorpSouth Conf. Center

Nuts and Bolts of Estate Planning with Nancy Hughes

May 26 – Ridgeland – MSCPA Center

Ridgeland Cluster

May 26 - June 6 – MSCPA Center and
Holmes Community College

CPE REGISTRATION

Due to space constraints, the previous course descriptions have been condensed. The full descriptions – as provided by the CPE vendors – are available through links on our web site: www.ms-cpa.org under EDUCATION. You may register through the members' portion of the web site or by mailing or faxing the registration portion below with your check or credit card number to: Mississippi Society of CPAs, 306 Southampton Row, Ridgeland, MS 39157. Fax: (601) 856-8255. Please check each course you wish to attend and circle each amount included to ensure we enter your payment correctly.

()	DATE	COURSE TITLE	CITY	LOCATION	AICPA*	\$ MEM	NON-\$MEM	CPE Hours	Rec'd Area
()	May 6	YOUNG CPA CONFERENCE	Jackson	Capitol Club		100	100	6	TBA
()	May 9-10	MISSISSIPPI TECHNOLOGY CONFERENCE	Jackson	Hilton		395	545	16	General
()	May 11	Audits of 401(k) Plans	Ridgeland	MSCPA Center	*	240	315	8	A&A
()	May 12	Mississippi Sales and Use Tax Update	Ridgeland	MSCPA Center		125	165	4	Tax
()	May 13	ACCOUNTING AND AUDITING CONFERENCE	Jackson	Hilton		175	250	8	A&A
()	May 16	Planning for Profits - How to Develop & Execute an Effective Business Plan	Ridgeland	MSCPA Center		240	315	8	General
()	May 16	S Corporation Key Issues, Compliance, and Strategies...	Hattiesburg	Convention Center	*	240	315	8	Tax
()	May 16	Advanced Update for Compilation, Review and Accounting Services	Hattiesburg	Convention Center	*	240	315	8	A&A
()	May 17	49 Tax-Cutting Moves for Individuals	Hattiesburg	Convention Center	*	240	315	8	Tax
()	May 17	FASB Review and Update: Common GAAP Issues Impacting All CPAs	Hattiesburg	Convention Center	*	240	315	8	A&A
()	May 17	Leadership Secrets of Football's Master Coaches	Ridgeland	MSCPA Center		240	315	8	General
()	May 18	Governmental and Nonprofit Annual Update	Hattiesburg	Convention Center	*	240	315	8	A&A+YB
()	May 18	AICPA's Annual Business Law Update	Hattiesburg	Convention Center	*	240	315	8	General
()	May 18-19	PROGRAM FOR MANAGEMENT DEVELOPMENT	Ridgeland	MSCPA Center		245	320	16	General
()	May 20	Construction Contractors Advanced Issues	Ridgeland	MSCPA Center	*	240	315	8	A&A(5)(+3)
()	May 23	Fraud Alert! Prevention & Follow-up	Ridgeland	MSCPA Center		240	315	8	A&A
()	May 23	Governmental & Nonprofit Annual Update	Tupelo	BancorpSo. Conf. Cntr.	*	240	315	8	A&A+YB
()	May 23	MBA in a Day	Tupelo	BancorpSo. Conf. Cntr.		240	315	8	General
()	May 24	Accounting and Auditing Update	Tupelo	BancorpSo. Conf. Cntr.		125	165	4	A&A
()	May 24	Ethics, Rules & Regulations	Tupelo	BancorpSo. Conf. Cntr.		125	165	4	Ethics
()	May 24	The Complete Guide to Employment Issues...	Tupelo	BancorpSo. Conf. Cntr.		240	315	8	General
()	May 24	Performance Analysis: Identify Profit Improvement Opportunities	Ridgeland	MSCPA Center		240	315	8	A&A
()	May 25	Common Frauds & Internal Controls...	Ridgeland	MSCPA Center	*	240	315	8	A&A
()	May 25	49 Tax-Cutting Moves for Individuals	Tupelo	BancorpSo. Conf. Cntr.	*	240	315	8	Tax
()	May 25	Fraud: Catching the Crooks Who Cook the Books	Tupelo	BancorpSo. Conf. Cntr.		240	315	8	A&A
()	May 26	Uncovering Misappropriation Schemes	Ridgeland	MSCPA Center	*	240	315	8	A&A
()	May 26	Nuts and Bolts of Estate Planning	Ridgeland	Holmes Comm. College		240	315	8	Tax
()	May 27	Financial Fraud, Forensics, and the CPA	Ridgeland	MSCPA Center		125	165	4	A&A
()	May 27	Cash & Tax Basis Fin. Stmt: Alternatives to GAAP & Reporting Reqmts.	Ridgeland	MSCPA Center		125	165	4	A&A
()	May 31	Adv. Issues in Mergers, Acquisitions & Sales... Businesses	Ridgeland	MSCPA Center		125	165	4	Tax
()	May 31	Practical Tips and Techniques for Dealing with the IRS	Ridgeland	MSCPA Center		125	165	4	Tax

* AICPA members can deduct \$30 per day from the appropriate fee for 8- and 16- hour seminars only. This discount must be taken at the time of registration.

The member rate for CPE programs is available to all members of the MSCPA. **Non-certified staff may also claim the member rate. This rate must be applied at the time of registration.**

Name _____ Company/Firm _____

Address _____ City, State, Zip _____

Are you a CPA? Yes ___ No ___ MSCPA Member? Yes ___ No ___ AICPA Member? Yes ___ No ___ Member # _____

Phone _____ Fax _____

Email Address (For Confirmations) _____

Amount Due \$ _____ (Did you remember to encircle each amount and to take qualified discounts?)

HAVE YOU MOVED OR CHANGED JOBS?

If so, logon to the member portion of the web site in the upper right corner of the home page, and update your information.
www.ms-cpa.org.

REFUND POLICY: You will receive a full refund if cancellation is received seven days prior to the scheduled date of the course. If you cancel within seven days, a fifty percent refund will be given. Personnel substitutions are permitted. **No refunds are given for same-day cancellations or no-shows.**

PLEASE INDICATE METHOD OF PAYMENT CREDIT CARD IS ☐ Personal ☐ Company



☐ Amex ☐ MasterCard ☐ VISA ☐ Discover

Mo. ___ Yr. ___
Account Number _____ Expiration Date _____

Billing Address for Credit Card including Zip _____

x _____ \$ _____
Card Member Signature _____ Amount _____ CCID Number _____

☐ I hereby authorize the MSCPA to charge \$ _____ to my credit card.

CONTINUING PROFESSIONAL EDUCATION

JUNE 2011

June 1, 2011

Wednesday
Ridgeland
MSCPA Center

Innovative Tax Planning for Individuals and Sole Proprietors

Discussion Leader: Peter Towle, JD, LL.M.

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 8:30-12:00

LEVEL: Intermediate **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4TPOI

COURSE OBJECTIVES AND DESCRIPTION: Get the latest techniques for building and conserving wealth through proactive tax planning and investment strategies. Completely updated for tax law changes, this course will bring you up to date on ways to save taxes with strategies for retirement savers, investors, homeowners and real estate investors, college savers, small business owners and just about anyone who pays taxes. Upon completion of this course, participants will be able to: Increase client wealth by focusing on tax-saving angles that are too good to ignore; Implement planning moves opened up by new and recent tax developments; and Avoid tax pitfalls.

June 1, 2011

Wednesday
Ridgeland
MSCPA Center

Estate Planning Strategies: Minimizing Taxes and Maximizing Wealth

Discussion Leader: Peter Towle, JD, LL.M.

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 1:00 - 4:30

LEVEL: Basic **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4EPE

COURSE OBJECTIVES AND DESCRIPTION: What is the estate tax? What is the gift tax? How are they inter-related? Explore the use of wills, trusts and life insurance as vehicles to reduce the estate tax. Whether your client is accumulating wealth or planning for its distribution upon death, advise them on the most tax-efficient way to structure their affairs to minimize taxation on the transfer of their wealth to intended beneficiaries. Upon completion of this course, participants will be able to: Understand the structure of the estate and gift tax; Minimize transfer taxes by incorporating exemptions and credits; Advise clients on filing requirements for Forms 706 and 709.

June 2, 2011

Thursday
Ridgeland
MSCPA Center

Controller's Update: Latest Trends for Today's Financial Manager

Discussion Leader: Tony Larusso, MBA, CMA

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 8:30-12:00

LEVEL: Update **CPE Credit:** 4 General **VENDOR:** AICPA **ACRONYM:** CL4SKSB

COURSE OBJECTIVES AND DESCRIPTION: Let us bring you up-to-date on the latest trends and issues in ethics, accounting, corporate finance, treasury management and business systems. Learn about leading-edge topics in managerial accounting and finance in a session that is packed with tips and how-to guidance for immediate use. More than half of the material is new every year, and existing topics are updated for new approaches in implementation or application. Put these hot, new tips to work in your company now. Owners, controllers, treasurers, financial officers and other financial managers will find this seminar beneficial.

June 2, 2011

Thursday
Ridgeland
MSCPA Center

Analyzing Your Company's Financial Statement

Discussion Leader: Tony Larusso, MBA, CMA

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 1:00 - 4:30

LEVEL: Basic **CPE Credit:** 4 A&A(2) General (2) **VENDOR:** AICPA **ACRONYM:** CL4FSABM

COURSE OBJECTIVES AND DESCRIPTION: More and more, clients will be turning to you for advice on financial performance and results. Are you ready? This course shows how to glean important information from financial statements to properly manage your firm. The course also shows the financial statements as a set of dynamic instruments to use for accurate, relevant and timely financial decisions. Focus on the economic and financial conditions that caused the statements to change and discover how clients can manage liquidity, debt and profitability. Plus, explore effect ratios, causal ratios, pro forma analysis, sustainable growth and more.

June 3, 2011

Friday
Ridgeland
MSCPA Center

Doing More with Less: Lean Accounting and Management

Discussion Leader: Tony Larusso, MBA, CMA

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 8:30-12:00

LEVEL: Advanced **CPE Credit:** 4 General **VENDOR:** AICPA **ACRONYM:** CL4LAMA

COURSE OBJECTIVES AND DESCRIPTION: You can do more with less! Learn to minimize waste and create wealth in your organization through a Lean Accounting and management approach that improves profitability by streamlining operations. Provide customer value through target-costing and eliminate waste through value-stream management. Those in both manufacturing and service industries can benefit from the techniques presented in this course. Upon completion of this course, participants will be able to: Increase profitability by increasing value to customers and clients; Create excellence and customer-driven performance; Improve the flow of products and services to the client; Create perfection through continuous process improvement. Industry CPAs in middle and upper management positions as well as public practitioners responsible for the performance, productivity and profitability of their organizations will benefit from this seminar.

June 3, 2011

Friday
Ridgeland
MSCPA Center

Decision-Making Tips, Tools & Techniques for Today's Financial Environment

Discussion Leader: Tony Larusso, MBA, CMA

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 1:00 - 4:30

LEVEL: Intermediate **CPE Credit:** 4 General **VENDOR:** AICPA **ACRONYM:** CL4TTMD

NEW

COURSE OBJECTIVES AND DESCRIPTION: CPAs and all financial professionals are required to take an active, if not leadership, role in numerous activities for their organizations. This course introduces analytical tools and techniques to assist in routine and non-routine situations. These include: identifying and addressing structural blockages to decision-making; data management; providing information and analysis; and improving budgeting, forecasting and operations. The course was developed to address the problem highlighted by the old saying, If the only tool you own is a hammer, all problems look like a nail. Today's fast-paced, global environment requires the knowledge of available techniques, including when and how to use them.

June 6, 2011

Monday

Ridgeland

NEW

MSCPA Center

MAP CONFERENCE

Discussion Leader: Kimberly Medlock, CPO

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 1:00 - 4:30

LEVEL: All **CPE Credit:** 4 General **VENDOR:** Productive Matters **ACRONYM:** MAP

NEW

COURSE OBJECTIVES AND DESCRIPTION: Please watch the newsletter and web site (www.ms-cpa.org) for details.

June 6, 2011

Monday

Ridgeland

Holmes Comm. College

Excel Tips, Tricks and Techniques for Accountants

Discussion Leader: Tommy Stephens, CPA

Cost: Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0

Course Hours: 8:30-4:30

LEVEL: Intermediate **CPE Credit:** 8 A&A(4) General(4) **VENDOR:** K2 Enterprises **ACRONYM:** EXL-1

COURSE OBJECTIVES AND DESCRIPTION: Excel is the accountant's tool of choice for analyzing and reporting financial data, yet most accountants have never received any formal Excel training. As a result, many accountants use time-consuming and error-prone processes to complete everyday tasks. This highly acclaimed course contains hundreds of tips, tricks, and techniques to improve your productivity and accuracy. Its content is based on over twenty years of experience in delivering Excel training to accountants and on feedback from tens of thousands of accounting and financial professionals just like you. The course has six major areas of topical coverage: productivity tips and tricks, formatting essentials, customizing Excel, formula-building essentials, three-dimensional workbooks, and printing essentials. If you are an Excel user, regardless of your level of experience, and you have never taken a formal Excel training course for accountants, you need this course! Participants will have access to sample data files. This seminar is designed for accountants who want to learn how to use Excel more efficiently and effectively. A working knowledge of Excel is necessary for those attending. For more details on this seminar, go to www.k2e.com.

June 7, 2011

Tuesday

Ridgeland

MSCPA Center

Accounting and Auditing Update

Discussion Leader: Stan Clark, CPA, PHD

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 8:30-12:00

LEVEL: Update **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4AUAA2

COURSE OBJECTIVES AND DESCRIPTION: Keep abreast of the fast-paced changes in accounting and auditing. This course covers the most relevant pronouncements, exposure drafts and consensus reports recently issued in the accounting, auditing, compilation and review arenas. This training will help you identify and apply recently issued FASB statements, interpretations and technical bulletins. Learn how to assess the effect of current auditing standards and standards on accounting and review services from coverage of the latest issues at the AICPA, EITF and FASB.

June 7, 2011

Tuesday

Ridgeland

MSCPA Center

Ethics, Rules & Regulations

Discussion Leader: Stan Clark, CPA, PHD

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 1:00 - 4:30

LEVEL: Basic **CPE Credit:** 4 Ethics **VENDOR:** Dr. Stan Clark **ACRONYM:** ERR-2

COURSE OBJECTIVES AND DESCRIPTION: This course satisfies the State Board's requirement for three hours of general ethics and one hour of Mississippi Rules and Regulations.

June 7, 2011

Tuesday

Ridgeland

Grantham Poole

AICPA Advanced Course: Overview of the AICPA Peer Review Program Standards

Discussion Leader: Gloria Roberts, CPA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Advanced **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** ADPRT

COURSE OBJECTIVES AND DESCRIPTION: This one-day, advanced course is designed for experienced reviewers who want to heighten their peer review skills. It is an excellent follow-up to the AICPA's training course, How to Conduct a Review Under the AICPA Practice-Monitoring Programs, and includes an up-to-the-minute analysis of the AICPA Peer Review Program Standards effective January 1, 2009. Enhance your ability to conclude and report peer review findings for system, engagement and report reviews while learning about changes to the peer review standards and the risk-based approach to planning a peer review.

June 7, 2011

Tuesday

Ridgeland

Holmes Comm. College

Quickbooks Advanced Features, Tools, and Techniques

Discussion Leader: Tommy Stephens, CPA

Cost: Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0

Course Hours: 8:30-4:30

LEVEL: Advanced **CPE Credit:** 8 A&A(6) General(2) **VENDOR:** K2 Enterprises **ACRONYM:** ADQ

COURSE OBJECTIVES AND DESCRIPTION: This advanced course is designed for those who are experienced with QuickBooks and who are looking for insight on how to deal with the more difficult issues that advanced users often face. The course includes coverage of techniques and features of which even advanced users are often not aware as well as useful workarounds for common problems. Some of the key topics covered are the best ways to exchange QuickBooks data with others, inventory accounting issues and solutions, tracking and managing sales taxes, working with and resolving payroll issues, advanced financial and operational reporting matters, job costing, time tracking, and much more. In addition, a detailed discussion on troubleshooting QuickBooks performance is included to ensure that your QuickBooks installation is operating at peak performance. If you are an experienced QuickBooks user and want to get more out of the product for your company and/or your clients, you need this course. For more details, go to www.k2e.com.

June 8 & 9, 2011

Wednesday-Thursday
Ridgeland
MSCPA Center

AICPA's Annual Accounting and Auditing Workshop

Discussion Leader: Anne Oestricher, CPA

Cost: Members: \$350 Non-Members: \$500 AICPA Member Discount: \$60

Course Hours: 8:30-4:30

LEVEL: Update **CPE Credit:** 16 A&A **VENDOR:** AICPA **ACRONYM:** AAUW

COURSE OBJECTIVES AND DESCRIPTION: Make sure your accounting and auditing skills are on par with industry standards. This comprehensive, two-day course updates you on all the new standards in accounting and auditing, compilation and review and other professional standards. Upon completion of this course, participants will be able to: Apply the recently issued FASB Statements and Interpretations, AICPA Statements of Position, Statements on Auditing Standards, Statements on Standards for Accounting and Review Services and Statements on Standards for Attestation Engagements to accounting and auditing problems. **HIGHLIGHTS:** Practical applications of the pronouncements covered; PCAOB and SEC reporting requirements; Latest issues such as variable interest entities; Latest insights such as the risk assessment process; Professional ethics update. **VALUE AID:** AICPA's Audit Risk Alert.

June 8, 2011

Wednesday
Ridgeland
Grantham Poole

Upcoming Peer Review: Is Your Firm Ready?

Discussion Leader: Gloria Roberts, CPA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** SNPR

COURSE OBJECTIVES AND DESCRIPTION: What does it take to have an effective quality control system that leads to a clean, unmodified peer review report? Find out how to prepare for your next review and what can be done on a daily basis to create a strong quality control environment for your firm. Identify the most common, significant deficiencies that peer reviews uncover and what you can do to prevent them in your firm. You will consider the process for selecting the appropriate peer reviewer and the right review year-end for your firm. If you have specialized engagements, such as governmental units, not-for-profit organizations, construction contractors or employee benefit plans, you will learn additional issues that come into play. Upon completion of this course, participants will be able to: Create a firm environment that focuses on quality control; Understand the basic steps for monitoring and inspections; Establish quality control system based on the Quality Control Standards; Recognize significant recurring engagement deficiencies and how to prevent them; and Prepare for your next peer review – decisions to make and pulling together the right information.

June 8, 2011

Wednesday
Ridgeland **NEW**
Holmes Comm. College

Internal Controls for Small Business Accounting Systems

Discussion Leader: Tommy Stephens, CPA

Cost: Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0

Course Hours: 8:30-4:30

LEVEL: Intermediate **CPE Credit:** 8 A&A **VENDOR:** K2 Enterprises **ACRONYM:** ITC

COURSE OBJECTIVES AND DESCRIPTION: More than ever, the importance of internal controls is being escalated, seemingly on a daily basis. From large enterprises seeking compliance with provisions of Sarbanes-Oxley to entrepreneurs seeking to grow their businesses, internal controls have taken on an increased level of significance in businesses of all sizes. For small businesses, maintaining an effective system of internal controls presents a significant challenge. Implementing many of the theoretical concepts surrounding internal controls – such as segregation of duties – may not be practical or even possible in some cases. Consequently, the current internal control structure of many small businesses fosters an environment in which too much risk is present. This course assists accountants in evaluating, developing, and implementing an effective internal control structure in a small business environment. Throughout this course, the concept of risk-based internal controls is stressed, ensuring that small businesses are insulated from the most significant risks. Participants will benefit from the case studies used in class in which theoretical concepts are implemented and demonstrated in leading small business accounting software programs such as QuickBooks, Peachtree, Microsoft Dynamics GP, and Sage MAS 90. For more details on this seminar, go to www.K2e.com.

June 10, 2011

Friday
Ridgeland **NEW**
MSCPA Center

Top Ten Fraud Schemes: How to Detect and Prevent Them

Discussion Leader: Donna Ingram, CPA, CFE, CFA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** TMC-1

COURSE OBJECTIVES AND DESCRIPTION: Many costly fraudulent schemes have occurred repeatedly throughout the past several decades. Why do these material and frequently recurring frauds succeed? One reason is that business owners, management, auditors, and employees fail to recognize the red flags that have been associated with these financial statement and misappropriation of asset frauds. Another major reason is that the reporting and transaction processing systems do not have adequate controls to either prevent and/or detect these schemes. This course will provide descriptions of how these major frauds are perpetrated (including real-world examples) and the types of cost-effective controls that can be implemented by both small and large businesses and nonprofit entities to identify and prevent these deceptive acts. Upon completion of this course, participants will be able to: Identify the risk factors and red flags for each of the top ten fraud schemes; design controls into systems to mitigate these fraud risks; Understand the

methodology of how these frauds are committed; and Educate others within his/her organization about common fraud techniques and how to recognize them.

June 13, 2011

Monday
Ridgeland
MSCPA Center

Chief Financial Officer: Executive Level Skills for Financial Managers

Discussion Leader: Dan Chenoweth, MBA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$0

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 A&A(2) General(4);Ethics(2) **VENDOR:** Executive Ed. **ACRONYM:** CFO

COURSE OBJECTIVES AND DESCRIPTION: Being a great accountant alone will not qualify you to be a chief financial officer. Effective CFOs are strong business people whose knowledge goes well beyond accounting. This seminar deals with the CFO's role in four important aspects of running a business. Topics Discussed include: The CFO's Role as Chief Ethics Officer (setting the tone at the top, Developing corporate values, establishing codes of conduct, and handling allegations of wrong-doing); The CFO's Role in Banking & Financing; CFO's Role in Operational Control; The CFO's Role in Compensation & Incentive Plans; and more. This seminar will include group discussion of five cases. Target Audience: People who are, or aspire to be, chief financial officers. Discussion will be primarily oriented towards medium-sized companies.

June 14, 2011

Tuesday
Ridgeland **NEW**
MSCPA Center

Creating the Best Projections You Can: Insights and Techniques

Discussion Leader: Dan Chenoweth, MBA

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 8:30-12:00

LEVEL: Intermediate **CPE Credit:** 4 A&A **VENDOR:** Executive Education **ACRONYM:** CBP

COURSE OBJECTIVES AND DESCRIPTION: All we really know is the past but all that really matters is the future. How can you take the historical knowledge you have about your company, its performance, your competitors, your industry and the economy to help your company plan for the future? We will examine current best practices in preparing budgets and projections and look at the critical roles of strategic planning and risk management in developing the best projections you can! Topics to be discussed include: The critical roles of strategic planning and risk management in developing best projections; Current budgeting and projections best Practices; How benchmarking and metrics have changed the budget process; The role of "black swans" in preparing and evaluating projections and budgets; and more. The course material will include group discussion and case studies. This seminar is for those who prepare, review, evaluate and use budgets and projections. **BRING A CALCULATOR.**

June 14, 2011

Tuesday
Ridgeland **NEW**
MSCPA Center

Financial Leadership: How to Create and Deliver Value

Discussion Leader: Dan Chenoweth, MBA

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 1:00 - 4:30

LEVEL: Intermediate - Advanced **CPE Credit:** 4 General **VENDOR:** Executive Education **ACRONYM:** FL

COURSE OBJECTIVES AND DESCRIPTION: The Financial Manager's role has expanded dramatically in recent years to include a role in creating the organization's strategy as well as driving the changes necessary to implement that strategy. This seminar will provide ideas, skills and confidence to help you make the transition from "Value Preserver" to "Value Creator." Topics Discussed: Strategic planning tools; Delivering Value; The Financial Manager as Change Agent; Involving the team in change; and Eight steps to achieve organizational change. This seminar includes cases, exercises and other opportunities for participants to apply course concepts to their own organizations. For more details on this seminar, click on the CPE Vendor link under the Education tab at www.ms-cpa.org.

June 15, 2011

Wednesday
Ridgeland **NEW**
MSCPA Center

Cases in Corporate Ethics for Mississippi CPAs: Discussion of Real Life Conflicts

Discussion Leader: Dan Chenoweth, MBA

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 8:30-12:00

LEVEL: All **CPE Credit:** 4 Ethics **VENDOR:** Executive Education **ACRONYM:** CCE

COURSE OBJECTIVES AND DESCRIPTION: This course has been submitted for approval to the State Board for three hours of general ethics and one hour of Mississippi Rules and Regulations.

June 15, 2011

Wednesday
Ridgeland **NEW**
MSCPA Center

Lean Accounting: Apply Lean Thinking to Financial Management

Discussion Leader: Dan Chenoweth, MBA

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

Course Hours: 1:00 - 4:30

LEVEL: Intermediate **CPE Credit:** 4 General **VENDOR:** Executive Education **ACRONYM:** LA

COURSE OBJECTIVES AND DESCRIPTION: Pressures from many sources are forcing financial managers to seek ways to do more with less. With pressures from increased regulation and competition, accountants everywhere are rethinking the way they manage. This seminar will show you how to identify the valueproviding outputs from the accounting department and focus on creating effective processes to deliver that value. Topics Discussed: Understand the process of lean thinking; View accounting processes from the user's perspective; Implement a "pull" system for financial information; Make accounting systems flow efficiently; Develop a culture of continuous improvement; and more. This seminar includes group discussion of four lean cases.

June 16, 2011

Federal Taxation of Timber Growers

Thursday
Ridgeland
MSCPA Center

Discussion Leader: Ted Englebrecht, PhD

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$0

Course Hours: 9:00-5:00

LEVEL: Update **CPE Credit:** 8 Tax **VENDOR:** Ted Englebrecht **ACRONYM:** TIMBER

COURSE OBJECTIVES AND DESCRIPTION: This one-day program is designed to provide basic coverage of Federal Income, Estate and Gift Tax provisions affecting timber growers. Topics to be covered include: The impact of recent legislation, reforestation expenses, carbon credits, capital gains, net operating losses, and casualty losses. Also: Form T, Section 199 deduction, timber depletion, Christmas tree taxation, like kind exchanges, involuntary conversions, special use valuation, new estate tax law, estate planning techniques, self-employment tax, and much more.

June 17, 2011

Friday

Ridgeland

NEW

MSCPA Center

Advanced Selected Issues for Trusts, Estates, and Their Beneficiaries

Discussion Leader: Ted Englebrecht, PhD

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$0

Course Hours: 9:00-5:00

LEVEL: Advanced **CPE Credit:** 8 Tax **VENDOR:** Surgent-McCoy **ACRONYM:** ITEB

NEW

COURSE OBJECTIVES AND DESCRIPTION: Changes in the tax rates have made knowledge of trusts and estates all the more important. This course examines more advanced tax issues that CPAs grapple with and explores how the new tax environment impacts planning for estates, trusts, and their beneficiaries. It also presents a discussion of the generation-skipping transfer tax. Major Topics: Depreciation and depletion deductions for estates and trusts, and state law nuances; The significant tax attributes of charitable remainder annuity trusts and charitable remainder unitrusts; The alternative minimum tax as it applies to estates and trusts; The significant tax attributes that flow out to beneficiaries on termination of an estate and trust; The five-step approach to complete a fiduciary tax return for a complex trust and/or estate using flowcharts and examples; Generation-skipping transfers; inclusion of current tax changes. Those attending should have completed a basic course in Form 1041 preparation or have experience in preparing Form 1041. For more details on this seminar, click on the CPE Vendor link under the Education tab at www.ms-cpa.org.

June 20, 2011

Monday

Gulfport

Great Southern Club

Audits of 401(k) Plans

Discussion Leader: Bill Felder, CPA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Basic **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** AFKP-2

COURSE OBJECTIVES AND DESCRIPTION: 401(k) plans have become a popular option for employee benefit plans, so you must have the skills to audit these plans effectively. Every aspect of how to audit a 401(k) plan and prepare financial statements that satisfy ERISA and SEC requirements are covered in this course. Tap into ways to plan and conduct 401(k) audits more efficiently and effectively, and understand the differences between 401(k) audits and other employee benefit plan audits. Upon completion of this course, participants will be able to: plan and conduct 401(k) audits, including those with voice-response recordkeeping systems, more efficiently and effectively; Recognize new developments affecting 401(k) audits. **HIGHLIGHTS:** Audit planning – analytical procedures, accounting estimates, fraud; Evaluating internal control; Auditing the statement of net assets available for benefits; Auditing the statement of changes in net assets available for benefits; Special audit considerations; Preparing the auditor's report; Financial statement disclosures; Supplementary schedules.

June 20, 2011

Monday

Gulfport

Great Southern Club

Advanced Excel

Discussion Leader: Tommy Stephens, CPA

Cost: Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0

Course Hours: 8:30-4:30

LEVEL: Advanced **CPE Credit:** 8 A&A(4) General(4) **VENDOR:** K2 Enterprises **ACRONYM:** ADE

COURSE OBJECTIVES AND DESCRIPTION: Although many accountants consider themselves experts in using Excel, most accountants are self-taught and do not use Excel to its full potential. This course is designed to take experienced, self-taught users to the next level. It provides real world examples developed by accountants for accountants in the following six major topic areas: collaboration and workbook security; using tables to analyze and report data; integrating and manipulating data from external sources; creating and auditing complex formulas; advanced data analysis with subtotals, filters, and PivotTables; and using charts to analyze and communicate information. Its content is based on twenty years of experience in delivering Excel training to accountants and on feedback from thousands of accounting and financial professionals just like you. If you use Excel extensively, you need this course! Participants will have access to sample data files. This course includes coverage of features found in Excel 2003, 2007, and 2010. For more details on this seminar, go to www.k2e.com.

June 20, 2011

Monday

Ridgeland

NEW

MSCPA Center

Small Business Accounting and Auditing Update

Discussion Leader: Kurt Oestricher, CPA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Update **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** SBAA

NEW

COURSE OBJECTIVES AND DESCRIPTION: Geared toward practitioners who provide accounting and auditing services to small businesses, this course updates you on the new standards in accounting, auditing, compilation and review and other professional standards that affect small businesses and their auditors. Cover practical applications of recent pronouncements, a compilation and review update, the latest insights on problems of financial statement fraud and professional ethics activities. **HIGHLIGHTS:** Newly-released AICPA audit and accounting guides; Latest issues such as fair value accounting; and the latest insights such as problems of financial statement fraud and the risk assessment process.

June 21, 2011

Tuesday

Gulfport

Great Southern Club

Accounting and Auditing Update**Discussion Leader:** Stan Clark, CPA, PHD**Cost:** Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0**Course Hours:** 8:30-12:00**LEVEL:** Update **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4AUAA3

COURSE OBJECTIVES AND DESCRIPTION: Keep abreast of the fast-paced changes in accounting and auditing. This course covers the most relevant pronouncements, exposure drafts and consensus reports recently issued in the accounting, auditing, compilation and review arenas. This training will help you identify and apply recently issued FASB statements, interpretations and technical bulletins. Learn how to assess the effect of current auditing standards and standards on accounting and review services from coverage of the latest issues at the AICPA, EITF and FASB.

June 21, 2011

Tuesday

Gulfport

Great Southern Club

NEW**PDF Forms - What Accountants Need to Know****Discussion Leader:** Tommy Stephens, CPA**Cost:** Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0**Course Hours:** 8:30-12:00**LEVEL:** Intermediate **CPE Credit:** 4 General **VENDOR:** K2 Enterprises **ACRONYM:** PDF4-1**NEW**

COURSE OBJECTIVES AND DESCRIPTION: You've worked with PDF files for years, but did you know that you can quickly and easily turn routine forms into interactive, fill-in PDF documents? Imagine converting timesheets, expense reports, job applications, time-off requests, and all of your other forms into interactive PDF documents that are automatically distributed. Now, also imagine responses collected and summarized using just a few keystrokes. Additionally, think about extending this functionality to transactional documents such as estimates, invoices, and purchase orders so that these documents can be prepared as interactive PDF forms and then imported into leading accounting applications, including QuickBooks. In this half-day seminar, you will learn about the near limitless possibilities associated with PDF forms. You will learn how to create PDF forms from existing paper forms, existing electronic forms, and even from scratch. You will also learn how to add calculations to your forms and how to automate the process of distributing forms, collecting responses, and summarizing the responses in one file. For more details on this seminar, go to www.k2e.com.

June 21, 2011

Tuesday

Gulfport

Great Southern Club

Ethics, Rules & Regulations**Discussion Leader:** Stan Clark, CPA, PHD**Cost:** Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0**Course Hours:** 1:00 - 4:30**LEVEL:** Basic **CPE Credit:** 4 Ethics **VENDOR:** Dr. Stan Clark **ACRONYM:** ERR-3

COURSE OBJECTIVES AND DESCRIPTION: This course satisfies the State Board's requirement for three hours of general ethics and one hour of Mississippi Rules and Regulations.

June 21, 2011

Tuesday

Gulfport

Great Southern Club

NEW**Security Tools - Up Close and Personal****Discussion Leader:** Tommy Stephens, CPA**Cost:** Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0**Course Hours:** 1:00 - 4:30**LEVEL:** Intermediate **CPE Credit:** 4 General **VENDOR:** K2 Enterprises **ACRONYM:** SEC4-1**NEW**

COURSE OBJECTIVES AND DESCRIPTION: Information security is no longer optional – it's the law! This course covers tools for securing emails, encrypting hard disks and flash drives, protecting data on mobile phones and other portable devices, securing documents, protecting desktops and servers, and more. Sarbanes-Oxley, HIPAA, state Security Breach Notification laws, and other laws and regulations can result in criminal charges for accountants who do not act with due diligence. It is no longer optional for accountants to understand the security risks they face and adopt control procedures to insure confidentiality of customer and client information. This course provides solutions. The focus is on software and hardware tools for achieving security. Live demonstration of how to use these tools is an integral part of the course. Participants will leave this course understanding where they are at risk, what tools they need to minimize this risk, and how to implement and use these tools. Go to www.K2e.com for more details on this seminar.

June 21, 2011

Tuesday

Ridgeland

MSCPA Center

Basis / Distribution for Pass-Through Entities: An IRS Hot Spot**Discussion Leader:** Bob Gilwee, Jr., CPA**Cost:** Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30**Course Hours:** 9:00-5:00**LEVEL:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** BDPTE

COURSE OBJECTIVES AND DESCRIPTION: With the advent of the electronic matching of K-1 information with items on partners' and S Corporation shareholders' returns, the IRS is scrutinizing more closely than ever the basis owners have and the transactions in which the computation of basis is required. This course addresses the rules used to determine basis for partnerships and S Corporations, and puts the computation of basis in contexts that often come under scrutiny -- loss limitations, distributions and sales of an interest, among others. Learn the crucial rules for computing the adjusted basis and the tax treatment of distributions of pass-through entities such as partnerships and S Corporations. Focus on the computation of the basis and the at-risk amount for these entities. Become familiar with correct allocation of liabilities among partners, the types and amounts of income that can result from distributions and sales of interests, and the basis of assets distributed from pass-through entities. Large CPA firm managers, partners and other tax practitioners will benefit from this seminar.

June 21, 2011

Tuesday

Ridgeland

Holmes Comm. College

Applying the Risk Assessment Standards Using a Case Study Approach**Discussion Leader:** Kurt Oestricher, CPA**Cost:** Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30**Course Hours:** 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 **A&A** **VENDOR:** AICPA **ACRONYM:** RCSA

COURSE OBJECTIVES AND DESCRIPTION: Although auditors of non-public entities have been working with the risk assessment standards (SAS Nos. 104 through 111) for a couple years, we continue to hear feedback that they (especially auditors of smaller entities) are still struggling with the implementation of the standards. This course focuses on audits of entities with limited personnel and accounting resources, non-complex operations and financing structures, and a governing body made up of an owner/manager or majority owner. In addition, the entity might also have at least one material weakness in internal control over financial reporting. Learn from examples and case studies demonstrating how the risk assessment standards may be practically implemented and documented. Focus on the most-struggled-with issues, using cases to provide practical application solutions. Upon completion of this course, participants will be able to: Demonstrate compliance with the risk assessment standards effectively and efficiently; Scale documentation to the smaller entity; Establish a documentation foundation that may be expanded to larger entities; Focus the audit effort; and Better control audit hours.

June 22, 2011

Wednesday

Gulfport

NEW

Great Southern Club

Outlook Essentials

Discussion Leader: Tommy Stephens, CPA

Cost: Members: \$125 Non-Members: \$165 AICPA Member Discount: \$0

NEW

Course Hours: 8:30-12:00

LEVEL: Intermediate **CPE Credit:** 4 General **VENDOR:** K2 Enterprises **ACRONYM:** OUE4

COURSE OBJECTIVES AND DESCRIPTION: Are you ready to learn the essential features in Outlook to help you manage your e-mail, contacts, and calendar more effectively? If so, then you should plan to invest four hours in this fast-paced seminar designed to help you become more proficient with some of Outlook's basic features. In this half-day seminar, participants will learn how to use Outlook to become more organized, to secure messages and other critical information, and to maintain control over their calendar. Much more than just a course on sending and receiving e-mail, participants will learn essential techniques for managing personal information. Don't miss this chance to learn how to take control of the critical information stored in Outlook – the business application you likely use more than any other. This course includes coverage of features found in Outlook 2003, 2007, and 2010. For more details on this seminar, go to www.K2e.com.

June 22, 2011

Wednesday

Gulfport

Great Southern Club

Construction Contractors: Accounting, Auditing and Tax

Discussion Leader: Andy Copeland, CPA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Basic **CPE Credit:** 8 **A&A(6)** Tax (1); General (1) **VENDOR:** AICPA **ACRONYM:** CAAT

COURSE OBJECTIVES AND DESCRIPTION: Master the fundamentals of the construction industry! Give your clients efficient, high-quality audit and review services and apply GAAP accounting methods applicable to construction contractors. Understand the intricacies of contractor tax regulations. Topics covered include accounting for long-term construction contracts, applying the audit risk model to a construction contractor and contractor tax accounting. It includes AICPA publications and the content is designed to meet the needs of practitioners and industry professionals. Upon completion of this course, participants will be able to: Provide efficient, high-quality audit and review services to construction clients; Apply GAAP accounting methods applicable to construction contractors; Identify key tax rules and how to apply them. Also included: Internal control and substantive procedures and how to work with surety and bonding companies. Accountants seeking a broad overview of the construction industry, Financial professionals in the construction industry, and Practitioners who have or expect to have contractor clients will benefit from this seminar. **VALUE AID:** Copy of the Audit Risk Alert, Construction Contractors Industry Developments.

June 22, 2011

Wednesday

Ridgeland

NEW

MSCPA Center

49 Tax-Cutting Moves for Individuals

Discussion Leader: Bob Gilwee, Jr., CPA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

NEW

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** FNTC-3

COURSE OBJECTIVES AND DESCRIPTION: Walk away with 49 practical and up-to-date strategies to help your individual clients conserve cash by cutting taxes. This course lays out the ideas for you in a logical sequence so you can quickly identify the tax-saving moves that are most appropriate for your clients' specific circumstances. Upon completion of this course, participants will be able to: Respond to tax-law and economic developments with up-to-date strategies that save taxes for individual clients; Suggest tax-smart moves that are appropriate in varying client circumstances; and Implement strategies for investors, retirement savers, homeowners, college savers, employees, self-employed individuals and seniors. **HIGHLIGHTS:** Tax-saving moves that work great in a down economy; Strategies that respond to a higher-tax environment; Tax-smart ideas for investors and retirement savers; Strategies for employees and self-employed individuals; Practical ideas for homeowners, college savers and seniors; The wonderfulness of Roth IRAs; and Tax-law changes and developments that benefit individual taxpayers while avoiding new pitfalls.

June 23, 2011

Thursday

Ridgeland

NEW

MSCPA Center

Controllershship: Leading Edge of Corporate Performance

Discussion Leader: Art Pulis, MBA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

NEW

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 General **VENDOR:** AICPA **ACRONYM:** CLECP

COURSE OBJECTIVES AND DESCRIPTION: As a controller in this fast-changing world, you have the unique responsibility of carefully balancing technical, financial skills with modern leadership skills. While most training is devoted to either technical or leadership skills, this unique program combines them for the financial executive. Learn state-of-the-art techniques to aid in understanding the changing needs of senior management, investors, creditors and customers; harness the information age; negotiate transactions; control product and workflow; and manage processes, people, quality and service. This course will show how to reshape

the role of controller and apply quantitative and non-quantitative techniques to financing transactions, cash management, planning and budgeting. Develop ways to lead people and master the intricacies of profit-center accountability and incentive compensation.

June 24, 2011

Friday

Ridgeland

NEW

MSCPA Center

Mastering the Applications of Budgeting While Side Stepping the Pitfalls

Discussion Leader: Art Pulis, MBA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

NEW

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 General **VENDOR:** AICPA **ACRONYM:** MAPB

COURSE OBJECTIVES AND DESCRIPTION: This innovative course brings to life the practical application of real-world planning and budgeting and helps you avoid the pitfalls within the budgeting process. This course identifies the most troublesome areas and explains how to recognize and circumvent them. Upon completion of this course, participants will be able to: Develop a realistic revenue budget; Employ a cost center approach to forecasting expenses; Create a capital budget that ensures wise choices; Self-assess to see if the company's culture enhances accountability; Apply tools that make budget revisions easier to apply; Plan, manage, and control a budget more effectively; and Teach others how to carry out their budgeting responsibilities. **HIGHLIGHTS** include: Estimating and budgeting revenues; Estimating and budgeting costs; Creating an environment that supports accountability; Developing budget reports that spur action; Ensuring goal execution; and Dealing with unanticipated events that create budgeting havoc.

June 27, 2011

Monday

Ridgeland

NEW

MSCPA Center

2011 Revised Yellow Book: Government Auditing Standards

Discussion Leader: Bill Wagner, CPA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

NEW

Course Hours: 9:00-5:00

LEVEL: Update **CPE Credit:** 8 A&A YB **VENDOR:** AICPA **ACRONYM:** EO-YB

COURSE OBJECTIVES AND DESCRIPTION: Do you perform engagements in accordance with the Yellow Book? If so, you need to know the latest about the 2011 Yellow Book revision. Gain a working knowledge of the latest Yellow Book standards from A to Z. Find out what stayed the same and what changed in the 2011 revision to the Yellow Book. Truly understand the relationship of Government Auditing Standards (a.k.a. the Yellow Book) to the AICPA auditing standards and OMB requirements. **HIGHLIGHTS:** Relationship of Government Auditing Standards to the AICPA auditing standards and OMB requirements; Yellow Book financial audit standards: general, field work, reporting; Standards for attestation engagements and performance audits; and Yellow Book requirements related to CPE, independence and peer review.

June 27, 2011

Monday

Ridgeland

Holmes Comm. College

Fair Value Accounting: A Critical Skill for All CPAs

Discussion Leader: Robin Taylor, CPA, ABV, CFE, CVA, CBA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** FVA

COURSE OBJECTIVES AND DESCRIPTION: Fair value accounting is reshaping traditional financial statements! Gain insights into the conceptual and practical reasons for using fair value as the required (or optional) measurement attribute for some new and existing accounting standards. The course covers the conceptual and practical issues that arise when fair value measurement is implemented under existing FASB standards and provides examples of these issues. In addition, the measurement and estimation challenges that confront preparers and auditors in making, and attesting to, fair value measurements are presented, and related guidance is provided. Upon completion of this course, participants will be able to: Understand key terminology in the Fair Value Accounting guidance; Apply the fair value hierarchy to appropriate approaches to measurement; Identify the key aspects of the new fair value option; Identify and evaluate the impact of the key measurement components as they pertain to management's representations and auditors' responsibilities; and Apply Fair Value Accounting to certain FASB guidance and Interpretations that require measurements of assets or liabilities at fair value. Practitioners and members in industry responsible for accounting and financial reporting will benefit from this seminar.

June 28, 2011

Tuesday

Ridgeland

MSCPA Center

Governmental and Nonprofit Annual Update

Discussion Leader: Bill Wagner, CPA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Update **CPE Credit:** 8 A&A YB **VENDOR:** AICPA **ACRONYM:** GNAU-3

COURSE OBJECTIVES AND DESCRIPTION: Change is inevitable and at times overwhelming if you are unprepared. Ensure you are current in governmental and nonprofit accounting and auditing. This time-tested update course is designed to prepare you for the latest accounting and auditing developments affecting governments and nonprofits. Upon completion of this course, participants will be able to: Apply the most recent requirements of the GASB & FASB directed toward governments and nonprofits; Utilize a solid understanding of the latest developments in A-133 and Yellow Book requirements; and Perceive recent activities of the AICPA including GAAS requirements. **HIGHLIGHTS:** Yellow Book developments; Latest A-133 and OMB compliance supplement developments; Latest activities and standards issued by the AICPA relating to nonprofits and governments; and New requirements issued or pending by the FASB and GASB.

June 28, 2011

Tuesday

Ridgeland

NEW

Holmes Comm. College

Strategies and Tactics in the New War Against Higher Individual Taxes

Discussion Leader: Harris H. (Trip) Barnes, III, JD

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$0

NEW

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 Tax **VENDOR:** Surgent-McCoy **ACRONYM:** IWAR-1

COURSE OBJECTIVES AND DESCRIPTION: Tax planning strategies are only as good as what they add to the bottom line. With significant tax changes now in place in 2011, clients need to review their best options for action. This course focuses on practical, innovative ideas and techniques that you and your clients can put into action today. Major Topics: Tax rate changes – what you can do now and later; Social Security; Retirement plans; Kiddie tax issues in 2011 and beyond; Identifying tax opportunities; Converting to a Roth IRA: is it now too late? Coverdell Educational Savings Accounts and §529 plans; Strategies for the small business owner; and much more.

June 29, 2011

Wednesday

Ridgeland

MSCPA Center

Frequent Frauds in Governments and Non-Profits

Discussion Leader: Bill Wagner, CPA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 A&A YB **VENDOR:** AICPA **ACRONYM:** FFGN

COURSE OBJECTIVES AND DESCRIPTION: What common frauds occur in governments and not-for-profits and how could they have been avoided? Through an informative case study approach, this course illustrates common frauds that make headlines and damage the reputations of government and not-for-profit organizations. Upon completion of this course, participants will be able to: Understand how common frauds are committed in the government and not-for-profit sectors and improve your fraud prevention and detection skills. **HIGHLIGHTS:** Personnel frauds; Fraudulent charging of expenses to grants; Overriding purchasing controls; Personal use of governmental and not-for-profit assets; Kickbacks related to construction projects; and Fictitious pledges and contributions receivable.

June 29, 2011

Wednesday

Ridgeland

Holmes Comm. College

Advanced Update for Compilation, Review and Accounting Services

Discussion Leader: Jim Crockett, CPA, DBA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Advanced **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** RPCR-2

COURSE OBJECTIVES AND DESCRIPTION: If you manage a compilation, review and accounting service practice, this course is an absolute must; it enables a partner to ensure that current year engagements conform to all applicable professional standards. A practice-oriented review of the latest developments, cases, and lively discussion among the experienced participants make this class informative and practical. The material covers the entire spectrum of partner concerns: current professional standards, independence rules, engagement and representation letters, field work, disclosure, reporting, documentation, quality control, engagement administration, specialty engagements and peer review.

June 30, 2011

Thursday

Ridgeland

NEW

MSCPA Center

Running a Non-Profit Like a For-Profit Business

Discussion Leader: Bill Wagner, CPA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Basic **CPE Credit:** 8 General YB **VENDOR:** AICPA **ACRONYM:** RNPO

NEW

COURSE OBJECTIVES AND DESCRIPTION: To succeed, a nonprofit organization must be efficient as well as effective. The key to effectiveness and efficiency is a combination of management and accounting. Accounting for a mission means more than providing management with a record-keeping system. Accounting means measuring performance and mission accomplishment, and even more important, transparency. Combining some of the business world's proven management practices with others designed especially for the nonprofit, offers the modern nonprofit organization a much better chance of effective and efficient mission accomplishment. That, together with efficient and effective accounting practices that produce quality financial information and transparency to the public, can be a winning combination for the nonprofit organization of the twenty-first century. Upon completion of this course, participants will be able to: Motivate board members; Manage working capital; Maximize the use of resources. **Highlights include:** Strategic planning, Budgeting, Personnel management, Incorporation & IRS requirements, Latest in accounting and transparency guidance, and Practical management tips.

June 30, 2011

Thursday

Ridgeland

Holmes Comm. College

S Corporation: Key Issues, Compliance and Strategies: An IRS Target

Discussion Leader: Jan Lewis, CPA

Cost: Members: \$240 Non-Members: \$315 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Basic **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** SCORP-2

COURSE OBJECTIVES AND DESCRIPTION: Once again this is the darling for many businesses; find out why during this information-packed session. Practical real-life examples give you ideas to apply immediately for your S Corporation clients. Review the advantages of the S Corporation tax rules. Minimize your client's tax bill with the latest business and tax strategies that make S Corporations so popular. Comply with the unique tax reporting rules for completing Form 1120S. Decide if an S Corporation is your client's entity of choice. **HIGHLIGHTS:** How to elect S Corporation status and how and when to terminate; Avoiding built-in gains, excess net passive income and business credit recapture; Tax considerations in the distribution of S Corporation earnings and profits; Reporting and filing requirements; Pass-through rules - selecting the most advantageous allocation method; Applying for the fiscal year most beneficial to the client; and Preparing the 1120S - hints to make the return preparation easier.

CPE REGISTRATION

Due to space constraints, the previous course descriptions have been condensed. The full descriptions – as provided by the CPE vendors – are available through links on our web site: www.ms-cpa.org under EDUCATION. You may register through the members' portion of the web site or by mailing or faxing the registration portion below with your check or credit card number to: Mississippi Society of CPAs, 306 Southampton Row, Ridgeland, MS 39157. Fax: (601) 856-8255. Please check each course you wish to attend and circle each amount included to ensure we enter your payment correctly.

(✓) DATE	COURSE TITLE	CITY	LOCATION	AICPA*	\$ MEM	NON- \$ MEM	CPE Hours	Recm'd Area
() June 1	Innovative Tax Planning for Individuals and Sole Proprietors	Ridgeland	MSCPA Center		125	165	4	Tax
() June 1	Estate Planning Strategies: Minimizing Taxes and Maximizing Wealth	Ridgeland	MSCPA Center		125	165	4	Tax
() June 2	Controller's Update: Latest Trends for Today's Financial Manager	Ridgeland	MSCPA Center		125	165	4	General
() June 2	Analyzing Your Company's Financial Statement	Ridgeland	MSCPA Center		125	165	4	A&A(2)+2
() June 3	Doing More with Less: Lean Accounting and Management	Ridgeland	MSCPA Center		125	165	4	General
() June 3	Decision-Making Tips, Tools and Techniques for Today's Fin. Env.	Ridgeland	MSCPA Center		125	165	4	General
() June 6	MAP CONFERENCE	Ridgeland	MSCPA Center		125	165	4	Other
() June 6	Excel Tips, Tricks and Techniques for Accountants	Ridgeland	Holmes Comm. College		255	330	8	A&A(4)+4
() June 7	Accounting and Auditing Update	Ridgeland	MSCPA Center		125	165	4	A&A
() June 7	Ethics, Rules & Regulations	Ridgeland	MSCPA Center		125	165	4	Ethics
() June 7	AICPA Adv. Course: Overview of AICPA Peer Review Standards	Ridgeland	Grantham Poole	*	240	315	8	A&A
() June 7	Quickbooks Advanced Features, Tools, and Techniques	Ridgeland	Holmes Comm. College		255	330	8	A&A(6)+2
() June 8-9	AICPA's Annual Accounting and Auditing Workshop	Ridgeland	MSCPA Center	*	350	500	16	A&A
() June 8	Upcoming Peer Review: Is Your Firm Ready?	Ridgeland	Grantham Poole	*	240	315	8	A&A
() June 8	Internal Controls for Small Business Accounting Systems	Ridgeland	Holmes Comm. College		255	330	8	A&A
() June 10	Top Ten Fraud Schemes: How to Detect and Prevent Them	Ridgeland	MSCPA Center	*	240	315	8	A&A
() June 13	Chief Financial Officer: Executive Level Skills for Financial Managers	Ridgeland	MSCPA Center		240	315	8	A&A(2)+2
() June 14	Creating the Best Projections You Can: Insights and Techniques	Ridgeland	MSCPA Center		125	165	4	A&A
() June 14	Financial Leadership: How to Create and Deliver Value	Ridgeland	MSCPA Center		125	165	4	General
() June 15	Cases in Corp. Ethics for Miss. CPAs: Discussion of Real Life Conflicts	Ridgeland	MSCPA Center		125	165	4	Ethics
() June 15	Lean Accounting: Apply Lean Thinking to Financial Management	Ridgeland	MSCPA Center		125	165	4	General
() June 16	Federal Taxation of Timber Growers	Ridgeland	MSCPA Center		240	315	8	Tax
() June 17	Advanced Selected Issues for Trusts, Estates, and Their Beneficiaries	Ridgeland	MSCPA Center		240	315	8	Tax
() June 20	Small Business Accounting and Auditing Update	Ridgeland	MSCPA Center	*	240	315	8	A&A
() June 20	Audits of 401(k) Plans	Gulfport	Great Southern Club	*	240	315	8	A&A
() June 20	Advanced Excel	Gulfport	Great Southern Club		255	330	8	A&A(4)+4
() June 21	Accounting and Auditing Update	Gulfport	Great Southern Club		125	165	4	A&A
() June 21	PDF Forms - What Accountants Need to Know	Gulfport	Great Southern Club		125	165	4	General
() June 21	Ethics, Rules & Regulations	Gulfport	Great Southern Club		125	165	4	Ethics
() June 21	Security Tools - Up Close and Personal	Gulfport	Great Southern Club		125	165	4	General
() June 21	Basis / Distribution for Pass-Through Entities: An IRS Hot Spot	Ridgeland	MSCPA Center	*	240	315	8	Tax
() June 21	Applying the Risk Assessment Standards Using a Case Study Approach	Ridgeland	Holmes Comm. College	*	240	315	8	A&A
() June 22	Outlook Essentials	Gulfport	Great Southern Club		125	165	4	General
() June 22	Construction Contractors: Accounting, Auditing and Tax	Gulfport	Great Southern Club	*	240	315	8	A&A(6)+2
() June 22	49 Tax-Cutting Moves for Individuals	Ridgeland	MSCPA Center	*	240	315	8	Tax
() June 23	Controllershship: Leading Edge of Corporate Performance	Ridgeland	MSCPA Center	*	240	315	8	General
() June 23-26	ANNUAL CONVENTION (Details will be sent separately)	Sandestin	Golf & Beach Resort					
() June 24	Mastering the Applications of Budgeting While Side Stepping the Pitfalls	Ridgeland	MSCPA Center	*	240	315	8	General
() June 27	2011 Revised Yellow Book: Government Auditing Standards	Ridgeland	MSCPA Center	*	240	315	8	A&A
() June 27	Fair Value Accounting: A Critical Skill for All CPAs	Ridgeland	Holmes Comm. College	*	240	315	8	A&A
() June 28	Governmental and Nonprofit Annual Update	Ridgeland	MSCPA Center	*	240	315	8	A&A
() June 28	Strategies and Tactics in the New War Against Higher Individual Taxes	Ridgeland	Holmes Comm. College	*	240	315	8	Tax
() June 29	Frequent Frauds in Governments and Non-Profits	Ridgeland	MSCPA Center	*	240	315	8	A&A
() June 29	Advanced Update for Compilation, Review and Accounting Services	Ridgeland	Holmes Comm. College	*	240	315	8	A&A
() June 30	Running a Non-Profit Like a For-Profit Business	Ridgeland	MSCPA Center	*	240	315	8	General
() June 30	S Corporation: Key Issues, Compliance and Strategies: An IRS Target	Ridgeland	Holmes Comm. College	*	240	315	8	Tax

* AICPA members can deduct \$30 per day from the appropriate fee for 8- and 16- hour seminars only. This discount must be taken at the time of registration.

The member rate for CPE programs is for all members of the MSCPA. **Non-certified staff may also claim the member rate.** This rate must be applied at the time of registration.

Name _____ Company/Firm _____
 Address _____ City, State, Zip _____
 Are you a CPA? Yes ___ No ___ MSCPA Member? Yes ___ No ___ AICPA Member? Yes ___ No ___ Member # _____
 Email Address _____ Phone _____ Fax _____
 Amount Due \$ _____ (Did you remember to encircle each amount and to take qualified discounts?)

HAVE YOU MOVED OR CHANGED JOBS?

If so, logon to the member portion of the web site in the upper right corner of the home page, and update your information.
www.ms-cpa.org

REFUND POLICY: You will receive a full refund if cancellation is received seven days prior to the scheduled date of the course. If you cancel within seven days, a fifty percent refund will be given. Personnel substitutions are permitted. **No refunds are given for same-day cancellations or no-shows.**

PLEASE INDICATE METHOD OF PAYMENT CREDIT CARD IS ☐ Personal ☐ Company

☐ Amex ☐ MasterCard ☐ VISA ☐ Discover

Account Number _____ Mo. _____ Yr. _____
 Expiration Date _____

Billing Address for Credit Card including Zip _____

x _____ \$ _____
 Card Member Signature Amount CCID Number

☐ I hereby authorize the MSCPA to charge \$ _____ to my credit card.

CPA Firms - Doing More with Less

With the current crunch on marketing budgets that CPA firms are experiencing nationwide, have you been asked to do more with less this past year? If so, how or what did you interpret that to mean? No one would argue that the accounting industry has struggled to find a path for growth in spite of shrinking budgets, long hours and disgruntled, overworked partners and staff. How do you ask more from these CPAs and accountants when they already may be stretched too thin?

I asked some members of the Association for Accounting Marketing ("AAM") to share some innovative solutions they have used to tackle marketing on a shoestring.

Jeanna Abbas, marketing director at Grand Rapids, Michigan-based Beene Garter LLP (1 office, 16 partners, 75 total staff), equated doing more with less to going on a diet. "You look at what you are currently 'consuming' (where your budget is going) and evaluate what is beneficial and what isn't. You might discover that, in a lot of cases, the choices you are making are full of 'empty calories'—there's no real return on investment. Then, you can start cutting things out, trimming down and making more appropriate choices that contribute to your success," Abbas says. "It is an on-going process, by which you should regularly plan ahead, track, report and re-evaluate your activities to further refine the process."

While it may be tempting to try to stretch your time and budget to reach as many niche areas as possible, "the key to doing more with less is shifting that mindset to instead reach a defined target audience in as many ways as possible," Abbas says.

NARROW DOWN THE FOCUS

Beene Garter LLP was able to identify very specific target audiences based on their professionals' experiences, abilities and desires, which were then matched with opportunities in the current marketplace. This enabled them to determine relevant activities to regularly and effectively reach their target audience(s). They paid careful attention to client care, prospect lists, key referral sources, organizations and events – all of which helped to solidify strong and effective marketing campaigns.

Example: For years the firm marketed to privately-owned medical practices. While the firm had general expertise serving a variety of healthcare clients, it decided to concentrate its time, resources and marketing dollars on a specific type of

medical practice: dental practices. This changed the focus significantly. "We chose to completely saturate the dental community and then grow from there," Abbas reports.

EMPOWERING OTHERS TO DO WHAT YOU CAN'T

Sandy Johnson, marketing manager of Houston-based Briggs & Veselka Co. (2 offices, 15 partners, 150 total staff), oversees a small marketing department with large aspirations. "With so many objectives and a long list of things to tackle, I was feeling overwhelmed," she says.

The key was leveraging the work to the right people. "Once I started looking outside myself, I was able to empower staff members to tackle some of the projects that I was struggling with. To my great surprise, I found that we had individuals right under our noses who were ready, willing and able to take on some very worthwhile projects," Johnson says. For instance, she tapped the resources of her IT director for the annual staff meeting video, and asked other key staff to assist with the tracking of proposals.

Creating task force groups is another of Sandy's secret weapons. "I asked for

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Honor an Outstanding MSCPA Member For Public Service

The membership is invited to nominate a member for consideration as the 2011 Public Service Award winner.

The winner will be recognized during the Annual Business Meeting Saturday, June 25, 2011 at the Sandestin Golf & Beach Resort. President Sim Mosby has named members of the 2011 Public Service Award Committee including: Ricky Bullock, Tupelo; Bill Kelly, Hattiesburg; and Gary Walker, Ridgeland.

Qualifying activities for the award include service clubs, church work, children's programs, economic development and public service. Submit a nominee's name to one of the committee members or to the MSCPA office for forwarding to the committee.

MAJOR EVENTS ON THE 2011 MSCPA CALENDAR

(Dates are tentative for some Fall Conferences)

Young CPA Spring Conference	May 6
Mississippi Technology Conference	May 9 & 10
Accounting & Auditing Conference	May 13
Hattiesburg Cluster	May 16 – 18
Program for Management Development	May 18 – 19
Tupelo Cluster	May 23 – 25
Ridgeland Cluster	May 25 – June 7
Accounting & Auditing Workshop	June 8 & 9
Gulfport Cluster	June 20 – 22
<i>Including Technology CPE from K2 Enterprises</i>	
Annual Convention	June 23 – 26
IRS Practitioners' Liaison Meeting	July 6
Technology Seminars in Tupelo	August 8 & 9
Governmental A&A Conference	August 18 & 19
Health Care Services Seminar	September 16
Industry Conference	October 18
Educators Symposium	October 28
Corporate Income Tax Returns Workshop	October 31 – November 1
Not-for-Profit Conference	November 4
Mississippi Tax Institute	November 10 & 11
Business Valuation & Litigation	November 14
1040 Tax Return Workshop	December 1 & 2

DOING MORE WITH LESS

continued from page 26

volunteers for a task force to oversee the redesign of our intranet. The task force is comprised of a variety of staff at all levels and, as such, will be more effective than if marketing and IT ran the project." Sandy plans to launch a LinkedIn Training Task Force this year.

DELEGATE APPROPRIATELY

A lesson learned is that you can't be all things to all people. This goes for individuals and for CPA firms. Learning your sweet spot as a firm can help you save considerable marketing dollars and will aid you in a more proactive approach to your marketing efforts. When you think in terms of a specific niche, the appropriate tactics become clearer, whether that means the right annual conference, appropriate social media forums, a meaningful networking group, or a targeted publication. Niche-specific strategies allow you to engage in proactive marketing that will get you in front of the right audience. You gain the freedom to say "no" to sponsoring an event simply because you were asked—and "yes" to one that will put you in contact with your target demographic.

The same theory applies to you as a

marketer. Where do your strengths lie? As an individual, you are better at certain things than others – such as being technologically savvy, a good motivator or an active listener. Leverage your own strengths as well as those of your professionals as best you can while acknowledging their areas for improvement. As Lee Iococca, the former president and CEO responsible for the revival of Chrysler Corporation during the 80s, said, "I hire people brighter than me and then I get out of their way."

EVALUATE & RE-EVALUATE

Another important factor that aided these CPA firms in doing more with less was their ability to take a giant step back to evaluate where they were, how they got there and where they wanted to go. Maintaining a strong focus on their goals fueled their commitment to closely track and evaluate the efforts they took in order to evaluate the effectiveness of the professionals' activities. This also helped to hold people accountable.

"The key to asking more from our professional staff has been in tracking everyone's efforts," Abbas says. "As a marketing department we have had to do the same thing with our staff as we do with our clients, prospects and referral sources.

We have to regularly, strategically and engagingly communicate the value of their activities (just like we communicate the value of our services). By staying focused, planning ahead, delegating tasks and reporting successes, our staff has a clear idea of exactly what they need to do and why/how it is valuable!"

Both marketing professionals reported that compartmentalizing a daunting task into manageable sections – either by creating specific niche-focused marketing campaigns or effective internal leadership teams – made big projects seem less intimidating.

These case studies are inspiring and provide encouraging examples of ways that your firm can empower staff by tapping into their passions and talents. It proves that everyone really can contribute to the growth of a CPA firm.

Lisa Tierney is a coach and an award-winning marketing consultant who has worked with CPAs for over ten years. She currently serves as the president of the Philadelphia Chapter of the Association for Accounting Marketing and serves as a member of the CPA Leadership Institute's Leadership Panel. She is a former chairperson of BKR International's Marketing Committee, a network of over 135 member CPA firms with more than 300 offices in over 70 countries around the world. She serves multi-partner CPA firms across the country. Lisa can be reached at (267) 470-4250 or at lisatierney@comcast.net.

Reprinted from the Association for Accounting Marketing's newsletter, Marketrends, January/February 2011

2012 Multi-State CPE & Ski Conference

January 9, 10, & 11, 2012 24 Hours of CPE Vail, Colorado Lion Square Lodge & Conference Center (ski-in, ski-out)

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<input type="checkbox"/>	Accounting and Auditing Update	1/10/12	4:10pm - 7:40pm	4 hours of CPE	\$80.00
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