

# 2015 MSCPA Convention

## June 25-28, 2015

The 2015 MSCPA Annual Convention is June 25-28, 2015 at the Sandestin Golf & Beach Resort in Sandestin, Florida marking the 95th anniversary for the MSCPA. President Karen Moody extends an invitation to all MSCPA members and friends of the Society to attend.

Activities begin on Thursday, June 25 as exhibitors set up in the Baytowne Conference Center. Two four-hour CPE programs are offered with Bill Taylor, CPA, presenting a four-hour program on Social Security, Medicare, and Prescription Drug Retirement Benefits Thursday morning. Thursday afternoon Dr. Kimberly Burke will present a four-hour Accounting & Auditing Update. 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. The reception will feature a luau theme and island attire is welcomed. A photo booth will be offered for members to record the event and the 95th anniversary celebration.

### Friday Morning Speakers:

**Alfonzo Alexander** speaks at 9 a.m. and brings an Update on NASBA Activities. Alfonzo Alexander serves as Chief Relationship Officer of NASBA and President of NASBA's Center for the Public Trust (CPT). In his role as President of



Alfonzo Alexander

the CPT, Alexander oversees the day-to-day operations and the growing number of CPT programs, including the Student Center for the Public Trust (StudentCPT), the Ethics Certification Program, the Being a Difference Award program and a professional membership network, all of which position the organization to accomplish its mission to champion public trust. Alexander earned a Bachelor of Science degree in Business Administration with an emphasis on Human Resources Management from Tennessee Technological University. He also earned a Master of Business Administration degree from Lipscomb University.

**Michael Angelo Caruso**, a nationally known motivator, educator & entertainer from Royal Oak, Michigan speaks at 10:30 on "What Comes Next After What Comes Next". (A special invitation has been extended to spouses to hear Michael's presentation).



Michael Angelo Caruso

Michael has delivered over 2,000 paid presentations and keynote speeches on the subjects of leadership, selling, and Internet marketing. He has spoken in Europe, Africa, the Middle East, the Caribbean, and 49 of the 50 states. Mr. Caruso is founder and President of Edison House, an international consulting firm, specializing in corporate, and personal improvement. Edison House clients include Bank of America, Citgo, Rayovac, Hallmark, The National Institutes of Health, Verizon Wireless, the United States Navy, and Nissan.

continued on page 14

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## Message from President Karen Moody

The 2015 convention is a special one. We will celebrate the 95th Anniversary of the MSCPA and our 30th year at Sandestin. Sadly, it will also be Jack Coppenbarger's last convention before he retires in October. I encourage everyone to attend as we will pay tributes to him, our Past Presidents and all who have given their time and efforts to the Society over the years. Special events and surprises are planned throughout the convention. You don't want to miss it. I welcome first time attendees and young CPAs to join us in the celebrations. Let's send Jack off in style and BREAK THE ATTENDANCE RECORD!

continued on page 14



Tim Decker



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*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 Amber Taylor Cole, Joseph David Emerson, Christopher Alan Hutchinson, Jason Harkins McDavid, and Emily M. Zizzi.

Now completing the membership process are:

**Sabrina G. Baio** was born in New Orleans and received an Associate of Arts degree from Mississippi Gulf Coast Community College and her Bachelor's degree from William Carey University. She is a CPA with Bio Soil Enhancers, Inc. in Hattiesburg.

**Bobbie Wright Daniels** was born in Mississippi and received a BS in Finance from Mississippi State University and MPA and Ph.D. in Accounting from Jackson State University. She is an Associate Professor at Jackson State University in Jackson.

**Lawanda M. Howard** was born in Jackson and received her BSBA from

the University of Southern Mississippi and MBA from Mississippi College. She is a Senior Accounting Analyst at the University of Mississippi Medical Center in Jackson.

**Mauri Lyn McKay** was born in Tylertown and received her BS in Accounting from the University of Central Florida.

**Andres Felipe Posada** was born in Colombia and received a Bachelor's in Business Administration from the University of Southern Mississippi and MBA from Mississippi College. He is a Senior Associate with Horne LLP in Ridgeland.

**Thomas Michael Steeno** was born in Richmond Heights, Missouri and received Bachelor of Accountancy and Master of Accountancy degrees from the University of Mississippi. He is a Staff Auditor with Silas Simmons, LLP in Natchez.

## Honor an MSCPA Member For Public Service

The membership is invited to nominate a member for consideration as the 2015 Public Service Award winner.

The winner will be recognized during the Annual Business Meeting Saturday, June 27, 2015 at the Sandestin Golf & Beach Resort.

Qualifying activities for the award include service clubs, church work, children's programs, economic development and public service. Submit a nominee's name by email to [mail@ms-cpa.org](mailto:mail@ms-cpa.org) for consideration by the Public Service Award Committee. Members serving on the committee this year include Lisa Sandifer, Greenville, Chairman; Susan Riley, Hattiesburg; and Jerry Goolsby, Jackson.

## State Society Exec Retiring in October

MSCPA Executive Director Jack Coppenbarger will retire in October after 28 years on staff.

A search committee has begun the work to secure his replacement (*see the position announcement on page 3*).

Coppenbarger joined the staff on Sept. 1, 1987 as CPE Director and was named Executive Director beginning Nov. 1, 1995.

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## — President of MSCPA Position Notice —

### Position:

President of the Board for the Mississippi Society of Certified Public Accountants (MSCPA), a membership organization of Certified Public Accountants across the State of Mississippi

### Office Location:

Metro Jackson Area, Mississippi

### Summary:

The President has overall responsibility for the operations of the Society and for providing strategic leadership of the organization by working with the Board to establish and execute long range goals, strategies, plans and policies. The President serves as the liaison for the Society and local chapters in communication with the American Institute of Certified Public Accountants (AICPA) and other businesses, governmental agencies and organizations. The President is required to travel to AICPA regional and national meetings each year at a location determined by the AICPA. The President is also required to travel throughout Mississippi each year to maintain communication with the various local chapters. The President is responsible for advising the governing body on the establishment and execution of the group's objectives within the limits of the bylaws and policies of the Society. The President is responsible for the daily operations of the MSCPA. All MSCPA staff report to the President. The President reports directly to the Chairman of the Board, the executive committee and the Board of Governors. The President serves as a non-voting resource person at all Board meetings.

### Skills Required:

The President should have natural energy and devotion to support the overall mission of the MSCPA. This position requires a person with strong oral and written communication skills. This includes the ability to speak extemporaneously on accounting and Society professional issues; ability to interact, negotiate, represent and counsel with members, governmental bodies, local and national organizations; ability to analyze various legal and financial documents; proven experience in management and business acumen.

### Education:

Minimum Bachelor's Degree with Business Emphasis

### Qualifications:

An energetic and enthusiastic individual with high ethical standards and an appropriate professional image; a well organized and self-motivated individual; a strategic thinker with sound technical skills, analytical ability, good judgment and strong operational focus; an understanding and appreciation of the importance of staff culture, chapters, continuing professional education, diverse member groups and statewide public relations. Prior experience is required with a preference in member association management.

### Salary Range:

Competitive based on experience

### Contact:

Send resume and salary requirement to [mscpapresidentsearch15@gmail.com](mailto:mscpapresidentsearch15@gmail.com).  
Or mail to MSCPA President Search, Attn: Cheryl Lee, P. O. Box 22507, Jackson, MS 39225-2507.

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# Volunteer for MSCPA Committee Service

MSCPA Committees meet Thursday, May 14 for Committee Day at the MSCPA Building and members are encouraged to volunteer now for committee service.

The process is very easy:

Current committee rosters are carried on the Society's website at [www.ms-cpa.org](http://www.ms-cpa.org). Click on The Association tab at the top left and then follow the link to Committee Rosters. Review the committee titles and send an email to [mail@ms-cpa.org](mailto:mail@ms-cpa.org) listing up to three committee preferences.

President-Elect Cheryl Lee will make appointments this Spring and a confirmation will be sent to the committee member with details on your committee meeting on May 14. Continuing committee members will receive a notice of details on their committee meeting schedule.

Committees will meet during morning (9-11 a.m.) or afternoon (1-3 p.m.) sessions May 14

Committees scheduled to meet in the morning starting at 9 o'clock include Accounting & Auditing, Governmental Accounting & Auditing, Health Care Services, Industry, Legislation, Non-Profits and the Young CPAs Liaison.

## LEADERSHIP LUNCHEON:

A leadership luncheon is scheduled from 11:30 a.m. to 12:45 in the MSCPA Building for **incoming Committee Chairman, current Committee Chairmen, candidates for office this year and MSCPA officers**. Guest speaker to be announced.

The afternoon committee schedule starts at 1 p.m. and includes Awards, Education & Scholarships, Business Valuation, Firm Administration & Development, Insurance Trust, Long Range Planning, and Taxation.

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

## President-Elect Cheryl Lee Names Chairmen for 2015-2016 Committees

President-Elect Cheryl Lee has named Committee Chairmen to serve in the 2015-2016 fiscal year. Representatives of the Millennial Generation have been named as Millennial Chairs.

Accounting & Auditing.....	Nathan Cummins, Vicksburg <i>Millennial Chairman: Ryan Wingfield, Natchez</i>
Advisory to State Board.....	Ed Jones, Pascagoula <i>Millennial Chairman: Josh Norris, Jackson</i>
Awards, Education & Scholarships.....	Annette Pridgen, Pearl <i>Millennial Chairman: Shanell Watson, Jackson</i>
Business Valuation & Litigation Support.....	Ed Simmons, Ridgeland <i>Millennial Chairman: Robert King, Jr., Hattiesburg</i>
Continuing Professional Education.....	Tela Hemenway, Pascagoula <i>Millennial Chairman: Yale Murphy, Ridgeland</i>
Firm Administration & Development .....	Beth Burgess, Jackson <i>Millennial Chairman: Katie Feibleman, Vicksburg</i>
Governmental Accounting & Auditing .....	Tommy Lindley, Jackson <i>Millennial Chairman: Scott Adams, Natchez</i>
Health Care Services.....	Linda Trifone, Jackson <i>Millennial Chairman: Joyce Turnage, Jackson</i>
Industry .....	Allison Wilson, Bolton <i>Millennial Chairman: Allison Garner, Oxford</i>
Insurance Trust.....	Lance Mize, McComb Co-Chairman: Jimmy Stokes, Gulfport <i>Millennial Chairman: Caitlin H. Goodman, Natchez</i>
Legislation.....	Linda Keng, Jackson <i>Millennial Chairman: Matt Bailey, Jackson</i>
Long Range Planning.....	Jerry Goolsby, Jackson Co-Chairman: Lee Adams, Jackson <i>Millennial Chairman: Wil Crawford, Jackson</i>
Non-Profits.....	Brent Wilson, Jackson <i>Millennial Chairman: Carley Moore, Jackson</i>
Peer Review .....	Charles R. Prince, Magee <i>Millennial Chairman: Cathy Slocum, Magee</i>
Professional Conduct .....	Larry Lefoldt, Ridgeland <i>Millennial Chairman: Morgan Geoghagan, Ridgeland</i>
Taxation.....	Ted Edwards, Jackson <i>Millennial Chairman: Traci Forrest, Jackson</i>
Young CPAs Liaison .....	Jan Lewis, Jackson <i>Millennial Chairman: Melanie Morrow, Ridgeland</i>



# How to Manage BYOD without Stifling Productivity

By Thomas G. Stephens, Jr., CPA, CITP, CGMA

Over the past five years, the rapidly expanding universe of personal technology devices, such as smartphones and tablets, has had an ancillary effect – an explosion of individually-owned devices connected to corporate networks. In this phenomenon, known as Bring Your Own Device (BYOD), well-meaning end users connect their personally-owned smartphones, tablets, and other devices to corporate networks so that they can access email and other data and services while away from the office. In the best of all possible worlds, BYOD facilitates increased productivity and allows team members greater flexibility and options to work while away from the office. On the other hand, because team members rarely activate adequate security measures on their individually-owned devices, sensitive corporate data can be at risk in a BYOD environment. In this article, we discuss how you can manage BYOD and reduce the related risks, without stifling

productivity.

## Educate Your Team on the Risks

Above all else, educate your team about the absolute business requirement for securing sensitive data, including that accessed through BYOD. Every team member should understand the risks associated with BYOD. Once they understand the risks, most team members will attempt to make all reasonable efforts to mitigate those risks.

Perhaps the two biggest risks that exist with BYOD are the following.

### 1. Compromised sensitive data.

If a team member's device becomes lost or stolen and it is not secured properly, then sensitive data potentially becomes compromised. Further, under security breach notification laws in place in almost all states, if such a breach occurs, your organization likely must notify all parties that are potentially impacted by the breach.

2. **Loss of control of organizational data.** If a team member using a personal device to access corporate networks leaves the organization, then all data on that team member's device falls out of control of the organization. Accordingly, all parties should be aware of this risk and you should implement measures to regain control of corporate data upon the departure of a team member.

In fact, and as indicated in the next section, you should implement policies that clearly spell out what each team member's responsibilities are in a BYOD scenario.

## Reducing BYOD Risk Starts with a Policy

Effectively managing BYOD begins with creating a BYOD policy and requiring all team members to agree to the policy as a condition of participating in BYOD. Team members who choose not

*continued on page 7*



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## BYOD MANAGEMENT

*continued from page 5*

to consent to the BYOD policy should be expressly prohibited from connecting any personal device to the corporate network.

The following five items are among those to include in the BYOD policy.

1. Specify what devices are permitted to connect to the corporate network. Include specific makes and models of devices that are expressly allowed to connect. You should not allow any device not in this approved device list to connect to corporate networks, even including email.
2. Identify who owns the data stored on the device and what happens to that data in the event a participating team member leaves the employment of the organization.
3. Indicate the list of apps permitted on the devices. In the absence of this step, participating team members could download apps that might potentially be harmful and expose or compromise sensitive data.
4. Stipulate what amount of reimbursement, if any, will be provided to team members for

business use of the employee-owned device.

5. Indicate what specific security measures team members **MUST** implement on their devices as a condition of participating in BYOD.

### Don't Forget to Address BYOC

In addition to BYOD, you should address a related risk, that of Bring Your Own Cloud (BYOC.) With BYOC, team members store corporate data in their personal cloud-based storage facilities, such as OneDrive, Dropbox, Google Drive, and Box. In the absence of a policy prohibiting using personal cloud-based storage tools, sensitive data can leak from your organization and you may no longer be able to control, secure, manage, backup, or recover this critical information.

Again, team members generally do not have bad intentions when storing data in their personal cloud services. Rather, cloud-based storage can be a very convenient way of sharing data across multiple devices. Further, it can facilitate collaboration between team members, leading to even higher levels

of productivity. But to mitigate risk, data should not be stored in personal cloud services. Instead, subscribe to business-oriented services such as OneDrive for Business, Dropbox for Business, or Box for Business. Additionally, tools such as ShareFile represent excellent options for corporate-level, cloud-based storage and collaboration.

### Consider Implementing Mobile Device Management Software

To manage the risks of BYOD more effectively and efficiently, consider implementing mobile device management (MDM) software. With MDM tools, you can create security policies and "push" these policies onto mobile devices used by your team members. Examples of items you can include in these policies are:

- Password length and complexity,
- Password age,
- What features, such as a camera, can be accessed on a mobile device, and
- Can the device connect to WiFi networks and, if so, which ones.

One example of an MDM tool is Apple's iPhone Configuration Utility, an

*continued on page 9*



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## BYOD MANAGEMENT

continued from page 7

example of which is shown in Figure 1. Other examples of MDM tools include AirWatch, MobileIron, and Good Pro. Each of these mobile device management tools provides you with the capability to create, distribute, and enforce necessary security policies on mobile devices. With such policies in place, you can substantially reduce the risks associated with BYOD, while simultaneously minimizing the amount of time you spend in the process.

### Summary

Properly managed and controlled, BYOD represents a potential win-win for all involved. Anytime access to data, better collaboration, improved intra and inter-organizational communications can all stem from an appropriately-implemented BYOD plan. However, in today's world, BYOD also presents a significant risk. Compromised data coupled with potential loss of control of data are the two biggest risks facing organizations allowing BYOD.

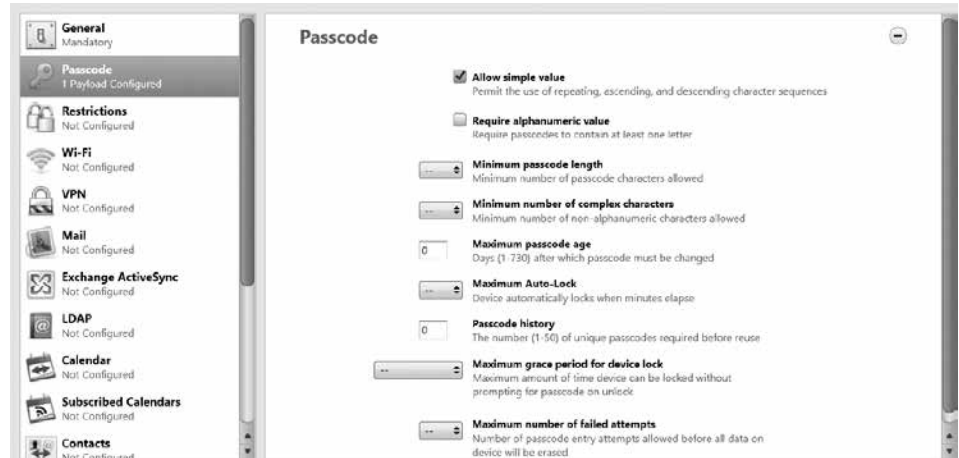


Figure 1 - Apple's iPhone Configuration Utility

However, by educating team members, implementing a well-designed and communicated BYOD policy, addressing BYOC, and implementing MDM tools, you can efficiently and effectively manage these risks without stifling team member productivity.

Tommy Stephens is a shareholder at K2 Enterprises, where he develops and presents continuing education courses to business professionals across North America. You may contact Tommy at [tommy@k2e.com](mailto:tommy@k2e.com). You may also follow Tommy on Twitter where his handle is @TommyStephens.



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# Improving Excel Workflow with Styles

By Dr. Will Fleenor

## Introduction

Both Excel and Word have Styles. A Style is a collection of all the formatting components (ex. Font size and type, number format, etc.) that a user can select for a range of cells or object like a graph. Figure 1 shows the default settings for the Normal Style in Excel 2013.

There are numerous advantages to using Excel Styles including the following improvements to common accounting tasks like preparing financial statements and data analysis:

- Reduce the amount of time needed to prepare professional looking reports
- Save time in changing defaults like the default font size or format type
- Provide consistent formation between financial reports and analysis based on multiple files
- Provide for consistent formatting across reports prepared by different people in your office



*Figure 1 – Components of a Style in Excel*

## Using Styles to Save Time

The Styles feature in Excel is not new. It has always been there but became much more apparent to Excel users when

Microsoft placed Styles on the Home tab of the Ribbon with the new Excel 2007 Fluent User Interface.

By default, Microsoft provides a number of preconfigured Styles that users can choose from to easily format documents in a consistent manner. Figure 2 shows a typical default set of Styles in Excel 2013.

Using these preconfigured Styles from the drop down menu on the Home tab of the Ribbon allows users to quickly, easily, and consistently format things like headings for financial reports or totals and subtotals. I often use the Heading 1, Heading 2, and Heading 3 in financial reports because doing so provides consistency from one of my reports to another. But what if you don't particularly like the preconfigured Styles?

## Modifying the Default Style

If you like the idea of using Styles to quickly apply formatting but just don't

*continued on page 11*

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## EXCEL WORKFLOW

continued from page 10

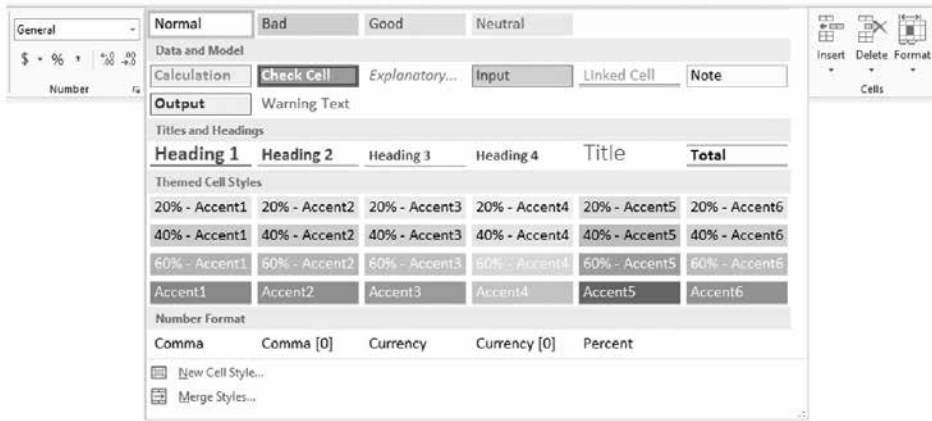


Figure 2 – Styles on the Home Tab of the Excel Ribbon

particularly care for Microsoft's default Style choices, you have several options. Probably the easiest is to modify the default settings for the Style in question. To modify a specific Style selection, (1) hover over the Style in the drop down Styles menu, (2) right mouse click, and (3) select Modify from the shortcut menu that appears.

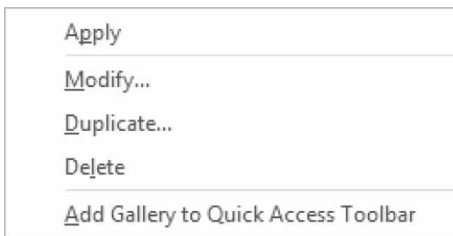


Figure 3 – Shortcut Menu that Appears When You Right Mouse Click While Hovering Over a Style

Once you select Modify, the Style dialog box will appear (see Figure 1 – Components of a Style in Excel). (4) Click on the Format button and you will be presented with the Format Cells dialog box (See Figure 4). Simply modify any of the elements of a Style using this same

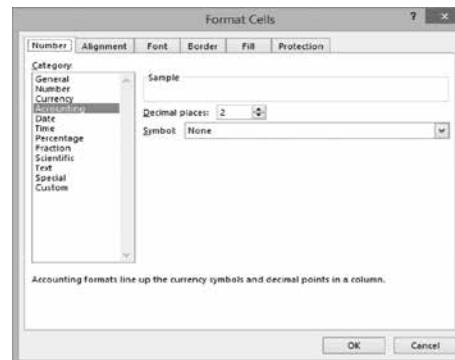


Figure 4 – Excel's Format Cells Dialog Box

Format Cells dialog box you are likely familiar with from applying Styles to specific ranges. Click OK twice and you are done.

### Changing Themes

Another approach would be to experiment with different Themes. Themes appear in the first section of the Page Layout tab of the Ribbon. Themes are a combination of Colors, Fonts and Effects. You can think of themes as different versions of Microsoft's preconfigured Styles. Every time you change from one theme to another, you will notice that the preconfigured Styles available back, on the Home tab, now look different. If you would like, you can develop your own custom Themes which can be "exported to" or "imported from" other files.

continued on page 12

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## EXCEL WORKFLOW

*continued from page 11*

### Creating Custom Styles

One last approach is to create your own unique Styles. There is a New Cell Style... option near the bottom of the preconfigured Styles drop down box (See Figure 2). You can select this option to create your own Style. For example, you can create a custom number format that will format numbers to the nearest million dollars. If you need this feature regularly, you could create a custom Style including this custom number format. Every time you need numbers to the nearest million, simply apply your custom Style. In that way, custom Styles can preserve custom number formats. There is no other easy way to preserve custom number formats.

If you created a unique startup workbook that you use every time to create a new Excel file, you should create your custom Styles in that startup workbook. Then, when you start a new project with your startup workbook, you will have your custom Styles. Unfortunately, any custom Styles you

create in any other workbooks are only available in the file they were created in.

### Using Styles to Insure Consistent Formatting

By using the same Styles over and over again your Excel reports will have a consistent look and feel. Even if you are the only person in your organization using your chosen Styles, at least all your work will be consistent.

Some organizations take the time to create a company or firm Style sheet that everyone is to use. This insures that all documents have a consistent (and company approved) look and feel. This also supports branding (ex. company name always in the same Style with same color and font) and provides the end user a clean, consistent product.

It is not uncommon to find companies and firms that have company approved Style sheets for MS Word and PowerPoint. Company Style sheets for Excel are less common. However, the process of copying Styles from one worksheet to another, in Excel, is very straight forward and makes it easy to distribute a company approved

Excel Style sheet to your entire staff.

1. Open the workbook that contains the Styles that you want to copy.
2. Open the workbook that you want to copy the Styles to, and then click Style on the Format menu.
3. Click Merge.
4. In the Merge Styles dialog box, double-click the workbook that contains the Styles that you want to copy, and then click OK.

### Conclusions

An understanding of how to use Excel Styles can improve workflow for accountants by making it easier to have polished, consistent, and professional looking reports. Using Styles, as opposed to manually formatting cells, can also save time. A basic understanding of how to use Excel Styles should probably be part of every accountant's portfolio of Excel features.

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### MISSISSIPPI SOCIETY OF CPAS 2015 ANNUAL MEETING

**Wednesday, June 24 - Sunday, June 28, 2015**

**GROUP CODE: 2342X7**

Name \_\_\_\_\_ Number in Party: Adults \_\_\_\_\_ Children \_\_\_\_\_

Company Name \_\_\_\_\_ Business Phone \_\_\_\_\_

Address \_\_\_\_\_ E-Mail \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Sharing With \_\_\_\_\_

Arrival Day/Date \_\_\_\_\_ Departure Day/Date \_\_\_\_\_

Please select method of payment:

Credit Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_ Signature \_\_\_\_\_

Authorization # \_\_\_\_\_ (located on the reverse side of card) Check # \_\_\_\_\_

Your cut-off date for reservations is **May 25, 2015**, after which rooms will be sold on a space-available basis.

### ACCOMMODATIONS AND RATES

Rooms will be made available three days prior and three days post event on a space-available basis.

A deposit of one night's room rate is required to secure rooms.

All room rates quoted **DO NOT** include 12% fees and 11.5% taxes.

Please circle your preferred accommodations. All requests are subject to availability at time booking request is received.

Any other type of accommodation will vary in cost depending on location.

<u>Accommodations</u>	<u>Daily Rate</u>	<u>Accommodations</u>	<u>Daily Rate</u>
Beachside Studio*	\$ 299.00	Beachwalk 3 Bdrm	\$ 384.00
Beachside 1 Bdrm*	\$ 355.00	Bayside 2 Bdrm	\$ 246.00
Beachside 2 Bdrm*	\$ 489.00	LeCiel - Guest Room	\$ 162.00
Beachside 3 Bdrm*	\$ 609.00	LeCiel - 1 Bdrm Suite	\$ 209.00
Westwinds 1 Bdrm*	\$ 369.00	Village - Studio	\$ 200.00
Westwinds 2 Bdrm*	\$ 519.00	Village 1 Bdrm	\$ 224.00
Westwinds 3 Bdrm*	\$ 629.00	Village 2 Bdrm	\$ 349.00
Southside 2 Bdrm	\$ 324.00	Grand Complex Studio	\$ 211.00
Southside 3 Bdrm	\$ 419.00	Grand Complex 1 Bdrm	\$ 239.00
Southside 3 Bdrm Loft	\$ 455.00	Grand Complex 2 Bdrm	\$ 359.00
Lakeside 2 Bdrm	\$ 289.00	Grand Complex 3 Bdrm	\$ 443.00
Lakeside 3 Bdrm	\$ 379.00	Luau 1 Bdrm	\$ 205.00
Beachwalk 2 Bdrm	\$ 281.00	Luau 2 Bdrm	\$ 297.00

\*A minimum stay of 5 nights is required on Beachfront accommodations.

The Grand Complex consists of accommodations in the Grand Sandestin®, Lasata, Bahia, and Elation

**IF ONE OF THE ABOVE ROOM TYPES ARE UNAVAILABLE ON-LINE, PLEASE CALL OUR RESERVATIONS DEPARTMENT AT 800-320-8115 TO CHECK FOR AVAILABILITY.**

Deposit is refundable in the event of individual room cancellation, provided notice is received by Sandestin® seven days prior to scheduled arrival date.

**BOOK ONLINE AT [www.Sandestin.com](http://www.Sandestin.com) and enter group code 2342X7**

**Sandestin.**  
Golf and Beach Resort

## 2015 CONVENTION

*continued from page 1*

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. New this year is a private pool party at Elephant Walk for the Young CPA Network members from 1:30 p.m. until 3:30 p.m.

### Free Evening Friday Night

This year's convention schedule features a free evening Friday night for members to enjoy the benefits of the Resort and sponsors and exhibitors will have ample free time for networking.

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

The Annual Business Meeting begins at 9 a.m. on Saturday with President Karen Moody presiding. Officers for the 2015-2016 fiscal year will be elected and reports from the Secretary, Treasurer, Insurance Trust Chairman, Legislation, AICPA Council, Young CPA Network and the Mississippi State Board of Public Accountancy will be presented. Members who have won the Public Service Award and Outstanding Educator Award will also be honored. CPA Exam Medal Winners will be recognized as will the recipient of the new Rising Star Award.

Following the morning refreshment break, members will gather in the main meeting room at 11 a.m. for exhibitor prize drawings.

### Saturday Afternoon

Volleyball Tournament & Beach Party 1:00 p.m. – 3:30 p.m. (near the Elephant Walk)

### Saturday Evening

Members return to the Conference Center on Saturday evening for the reception at 6:30 p.m. and will be seated for dinner at 7:15 p.m. President Moody will introduce newly elected officers and the traditional exchange of the gavel will be made as President-Elect Cheryl Lee nears the beginning of her term. The Bailey Trophy will be presented to the winning volleyball team, and there will be surprises throughout the evening.

The program will include a celebration

of the 95th Anniversary and the 30th year at Sandestin with recognitions of Past Presidents and other members who have served the Society throughout the years. A special tribute to retiring Executive Director Jack Coppenbarger will highlight the evening.

Entertainment will feature Tim Decker, a nationally touring performance speed painter who paints celebrity and patriotic portraits live in front of a crowd. Each painting takes roughly 4-7 minutes and the whole experience is set to music. He performs at corporate, charity, and private events across the entire country. Tim grew up in Brodheadsville, a small town in Eastern Pennsylvania and studied Media Communications at East Stroudsburg University. Tim will do three paintings during his presentation which will then be auctioned off with proceeds going to the MSCPA Education Scholarship Fund.

The evening will conclude with the prize money drawing. Members are urged to visit the exhibitors' booths on Friday and Saturday. Bring the stamped cards to be eligible.



### Prayer Breakfast Closes Convention Sunday morning...

The traditional Sunday morning Prayer Breakfast, very popular with members and well attended, will close the 2015 meeting.



**SPECIAL FOR SPOUSES:** On Friday morning at 9 o'clock, Vicki McCain of Kitchenique Cooking School returns by popular demand to present a cooking demonstration. Breakfast is included. Vicki presents cooking classes in the area and has operated the Kitchenique Store for many years. This will be held on the Second Level of the Baytown Conference Center. The cooking program will conclude in time for spouses to hear Michael Angelo Caruso's presentation in the main meeting room.

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



### CHILDREN'S PROGRAMS:

- THURSDAY EVENING (6:30 p.m. to 9 p.m.): Arts, crafts and snacks.
- FRIDAY MORNING (8:45 a.m.

to 12 Noon): New this year. Friday morning kite making and pool party to allow spouses to participate in the morning activities.

- SATURDAY NIGHT CARNIVAL (6 p.m. to 10 p.m.): Featuring arts, crafts, movie and the popular Captain Davy Pirate Magic Show, balloon animals and face painting. Dinner is included.

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## KAREN MOODY

*continued from page 1*

I also encourage members to book their room reservations through the MSCPA group block. Per our contract with Sandestin, we earn complimentary rooms based on ATTENDANCE if we meet our minimum percentage for the block. These rooms help defray the costs of housing the MSCPA staff and our speakers and entertainers. We can also be subject to a monetary attrition penalty if we do not utilize our group commitment. Even with rising facility costs we continue to strive to hold a quality family oriented convention without passing the costs to our members. Please help the Society hit our goals!

Thank you again for allowing me to serve as your President this year. Hope to see you at the beach!



# MAY/JUNE 2015 CONTINUING PROFESSIONAL EDUCATION

## May 1, 2015

Friday

Ridgeland

MSCPA Center

## Young CPA Conference

**Discussion Leader:** Panel

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

**Course Hours:** 8:00-4:30

**LEVEL:** Update **CPE Credit:** 8 General **VENDOR:** Self-Developed **ACRONYM:** YCPA

**COURSE OBJECTIVES AND DESCRIPTION:** As the date for this event approaches, please access the MSCPA web site for details and registration information on this conference. [www.ms-cpa.org](http://www.ms-cpa.org)

## May 11-12, 2015

Monday-Tuesday

Ridgeland

Embassy Suites

## Mississippi Technology Conference

**Discussion Leader:** Panel

**Cost:** Members: \$435 Non-Members: \$585 AICPA Member Discount: \$0

**Course Hours:** 8:30-4:30

**LEVEL:** Basic **CPE Credit:** 16 General **VENDOR:** K2 Technologies **ACRONYM:** MTC

**COURSE OBJECTIVES AND DESCRIPTION:** This conference is filled with 16 hours of fast-paced presentations designed to maximize your time and enhance your learning. Nationally recognized speakers have extensive expertise in numerous software applications. They will share their knowledge with you in order to help you do your job with efficiency and ease. Participants will receive helpful tips and advanced techniques, along with the tools and skills necessary to keep up with the ever-increasing pace of changes in computer technology

## May 13, 2015

Wednesday

Ridgeland

Embassy Suites

## Accounting and Auditing Conference

**Discussion Leader:** Panel

**Cost:** Members: \$200 Non-Members: \$275 AICPA Member Discount: \$0

**Course Hours:** 8:30-4:30

**LEVEL:** Basic **CPE Credit:** 8 A&A **VENDOR:** Self-Developed **ACRONYM:** AAC

**COURSE OBJECTIVES AND DESCRIPTION:** As the date for this event approaches, please access the MSCPA web site for details and registration information on this conference. [www.ms-cpa.org](http://www.ms-cpa.org)

## May 15, 2015

Friday

Ridgeland

MSCPA Center

## Health Care Reform Act: Critical Tax and Insurance Ramifications

**Discussion Leader:** William F. (Bill) Taylor, CPA

**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

**Course Hours:** 8:30-12

**LEVEL:** Basic **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4HCRA-1

**COURSE OBJECTIVES AND DESCRIPTION:** The Health Care Reform Act continues to be phased in this year and in future years. This seminar will help you better understand the impact of the Act so you can describe to your clients how health care and paying for coverage will change in the future. In addition, you'll discover how to use this information for tax planning opportunities. This topic is constantly changing so make sure you're up-to-date on the latest information.

## May 15, 2015

Friday

Ridgeland

MSCPA Center

## Estate Planning: Minimizing Taxes and Maximizing Wealth

**Discussion Leader:** William F. (Bill) Taylor, CPA

**Cost:** Members: \$140 Non-Members: \$180 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 interrelated? 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.

## May 18, 2015

Monday

Ridgeland

MSCPA Center

## Mississippi Sales & Use Tax

**Discussion Leader:** Greg Duke

**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

**Course Hours:** 8:30-12

**LEVEL:** Basic **CPE Credit:** 4 Tax **VENDOR:** Self-Developed **ACRONYM:** MSUT

**COURSE OBJECTIVES AND DESCRIPTION:** This seminar, led by a representative of the Mississippi Department of Revenue, will include an introduction on \*Sales Tax: Levies, Returns and Filing, and Exemptions; Use Tax; Causal Sales Tax; Industry-Specific Sales Tax; Contractor's Tax; and more. This seminar will be a great opportunity to get the latest Sales and Use Tax information directly from the Department of Revenue.

**May 18, 2015**

Monday  
Ridgeland  
MSCPA Center

**Ethics, Rules and Regulations**

**Discussion Leader:** Dr. James Crockett

**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

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

**LEVEL:** All **CPE Credit:** 4 Ethics **VENDOR:** Self-Developed **ACRONYM:** ERR-1

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

**May 19, 2015**

Tuesday  
Ridgeland  
MSCPA Center

**The Complete Guide to Payroll Taxes and 1099 Issues**

**Discussion Leader:** Arthur Auerbach, CPA

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

**Course Hours:** 8:30-4:30

**LEVEL:** Basic **CPE Credit:** 8 Tax **VENDOR:** Surgent **ACRONYM:** CGPT

**COURSE OBJECTIVES AND DESCRIPTION:** Employment taxes are often overlooked as an area where more planning may be effective. Payroll taxes have become an increasing burden for the average business and IRS penalties for noncompliance have risen dramatically in recent years. They have also been subject to employer incentives

**May 19, 2015**

Tuesday  
Ridgeland  
Grantham Poole

**AICPA Peer Review Program Advanced Course**

**Discussion Leader:** Gloria Roberts, CPA

**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30

**Course Hours:** 8:30-4:30

**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 Program. This course includes an analysis of the latest AICPA Peer Review Program Standards as well as materials focused on the areas of peer review guidance which reviewers find the most problematic.

**May 20, 2015**

Wednesday  
Ridgeland  
MSCPA Center

**Social Security, Medicare, and Prescription Drug Retirement Benefits: What Every Baby Boomer Needs to Know Now**

**Discussion Leader:** Arthur Auerbach, CPA

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

**Course Hours:** 8:30-4:30

**LEVEL:** Basic **CPE Credit:** 8 Tax **VENDOR:** Surgent **ACRONYM:** SSRB-1

**COURSE OBJECTIVES AND DESCRIPTION:** Social Security seems poised for changes in benefits and eligibility age. As the baby boomer generation approaches retirement, financial and tax planners can expect increased demand for strategies that dovetail Social Security with other retirement objectives. This course provides tax and financial planning professionals with both the background information on the Social Security system and the strategies clients will need in dealing with it.

**May 21-22, 2015**

Thursday-Friday  
Ridgeland  
MSCPA Center

**Program for Management Development**

**Discussion Leader:** Panel

**Cost:** Members: \$260 Non-Members: \$340 AICPA Member Discount: \$0

**Course Hours:** 8:30-4:30

**LEVEL:** All **CPE Credit:** 16 General **VENDOR:** Self-Developed **ACRONYM:** PMD

**COURSE OBJECTIVES AND DESCRIPTION:** As the date for this event approaches, please access the MSCPA web site for details and registration information on this conference. [www.ms-cpa.org](http://www.ms-cpa.org)

**May 26, 2015**

Tuesday  
Ridgeland  
MSCPA Center

**Audits of 401(k) Plans**

**Discussion Leader:** Cecil M. (Bill) Felder, CPA, CISA

**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30

**Course Hours:** 8:30-4:30

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

**COURSE OBJECTIVES AND DESCRIPTION:** 401(k) plans are a popular option for employee benefit plans, so you must have the proper 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.

**May 27, 2015**

Wednesday  
Ridgeland  
MSCPA Center

**IT Risks and Controls in Current and Emerging Environments****Discussion Leader:** Glenn Helms, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** ITRC

**COURSE OBJECTIVES AND DESCRIPTION:** Accounting transactions and other types of processing are conducted in a variety of IT environments. These IT environments could be traditional, such as Local Area Networks, or emerging, such as cloud and mobile computing. There are internal controls and risks that are common to all IT environments in both large and small entities. There are also IT internal controls and risks that are unique to less complex, more complex, traditional, and emerging technologies.

**May 27, 2015**

Wednesday  
Hattiesburg  
Lake Terrace Conv. Ctr.

**Advanced Controller and CFO Skills****Discussion Leader:** Steven Toups, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 8:30-4:30**LEVEL:** Advanced **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** ACCS-1

**COURSE OBJECTIVES AND DESCRIPTION:** This course examines best practices of leading-edge controllers and CFOs. Demonstrate your advanced skills that add value and contribute to the success of the organization. You will learn 10 specific skills every CFO or controller needs to be successful, and you will find that you suddenly have more power and influence than you ever thought possible. Show the company's leadership how vital you are to their profitability!

**May 27, 2015**

Wednesday  
Hattiesburg  
Lake Terrace Conv. Ctr.

**Forensic Accounting Investigative Practices****Discussion Leader:** Donna Ingram, CPA, CFE**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** FAIP

**COURSE OBJECTIVES AND DESCRIPTION:** If you are looking to gain more skills in the growing and lucrative field of forensic accounting, you'll want to start with this course. Effective forensic accountants are part of a new breed of practitioners who possess a broad spectrum of traits and knowledge. This course dives into the unique investigative and communications skills and analytical practices required of the best forensic accountants by teaching you how to provide expert witness testimony in mediations, arbitrations, and governmental hearings.

**May 28, 2015**

Thursday  
Hattiesburg **New**  
Lake Terrace Conv. Ctr.

**Surgent's Individual and Financial-Planning Tax Camp****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0 **New****Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** Surgent **ACRONYM:** IFCP

**COURSE OBJECTIVES AND DESCRIPTION:** Each year brings its own set of tax planning challenges, and 2015 is no exception. This course aims to inform tax planners with the most important planning ideas wealthy clients, middle-income clients, and closely held business owners need to consider in 2015 to take advantage of the present and plan for the future.

**May 28, 2015**

Thursday  
Ridgeland  
MSCPA Center

**Internal Control and COSO Essentials for Financial Managers, Accountants and Auditors****Discussion Leader:** Glenn Helms, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 8:30-4:30**LEVEL:** Basic **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** ICDAD

**COURSE OBJECTIVES AND DESCRIPTION:** Many managers, supervisors, and accountants in business, government or nonprofits are not able to identify their departmental policies and procedures that function as the primary controls against errors and fraud. Alternately, auditors performing field work may be confused about how to interpret and evaluate management's documentation of accounting processes and controls. Neither party may truly understand how their duties differ. This course gives participants a solid understanding of systems and control documentation



**May 28, 2015**

Thursday

Hattiesburg

**New**

Lake Terrace Conv. Ctr.

**Securing Your Data - Practical Tools for Protecting Information****Discussion Leader:** Karl Egnatoff, CPA, CITP**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0 **New****Course Hours:** 8:30-12**LEVEL:** Intermediate **CPE Credit:** 4 General **VENDOR:** K2 **ACRONYM:** SEC4-1

**COURSE OBJECTIVES AND DESCRIPTION:** How do you encrypt sensitive information? How do you acquire and use e-signatures? What are the security tools you need and how do you use them to secure your sensitive data and systems? Security is not optional and yesterday's security techniques are not working as effectively as they once were. It's time to tune up what you know about protecting sensitive data. Security failures, such as a breach of client or customer data, are costly – they can even drive an organization out of business. In this course, participants learn about the latest tools and techniques for encryption, virus protection, secure communications, secure authentication, and more. The course is taught by explaining and demonstrating each of these tools and techniques.

**May 28, 2015**

Thursday

Hattiesburg

Lake Terrace Conv. Ctr.

**Technology Update****Discussion Leader:** Karl Egnatoff, CPA, CITP**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 1:00-4:30**LEVEL:** Intermediate **CPE Credit:** 4 General **VENDOR:** K2 **ACRONYM:** TUP4-1

**COURSE OBJECTIVES AND DESCRIPTION:** Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the cloud, security, and other technology-related issues? If you answered "yes" to any of these questions, then make plans now to invest four hours in this fast-paced and highly informative seminar that is sure to ramp up your return on technology investment. The technology tools available to all have never been better, but many are not taking full advantage of these tools.

**May 29, 2015**

Friday

Ridgeland

**New**

MSCPA Center

**Fraud Update: Detecting and Preventing the Top Ten Fraud Schemes****Discussion Leader:** Glenn Helms, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30 **New****Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** TTFS

**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.

**May 29, 2015**

Friday

Hattiesburg

Lake Terrace Conv. Ctr.

**Excel Best Practices****Discussion Leader:** Karl Egnatoff, CPA, CITP**Cost:** Members: \$270 Non-Members: \$345 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 General **VENDOR:** K2 **ACRONYM:** EBP

**COURSE OBJECTIVES AND DESCRIPTION:** As spreadsheets continue to evolve, so too must your practices for creating, editing, and auditing them. In this program, you will gain an in-depth understanding of the best ways to work with Excel. The topics covered in this seminar include best practices associated with Excel spreadsheets in each of the following areas: creating and editing Excel workbooks, securing Excel workbooks, collaborating with others in Excel, and reporting on data contained in Excel. Today's best practices for Excel differ significantly from those used in the past and you will learn the best ways to work with Excel spreadsheets in this "must see CPE" program.

**May 29, 2015**

Friday

Hattiesburg

Lake Terrace Conv. Ctr.

**Ethics, Rules, and Regulations****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 8:30-12**LEVEL:** All **CPE Credit:** 4 Ethics **VENDOR:** Self Developed **ACRONYM:** ERR-2

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

**May 29, 2015**

Friday  
Hattiesburg  
Lake Terrace Conv. Ctr.

**Health Care Reform Act: Critical Tax and Insurance Ramifications****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 1:00-4:30**LEVEL:** Basic **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4HCRA-2

**COURSE OBJECTIVES AND DESCRIPTION:** The Health Care Reform Act continues to be phased in this year and in future years. This seminar will help you better understand the impact of the Act so you can describe to your clients how health care and paying for coverage will change in the future. In addition, you'll discover how to use this information for tax planning opportunities. This topic is constantly changing so make sure you're up-to-date on the latest information.

**June 1, 2015**

Monday  
Ridgeland  
MSCPA Center

**IRS Disputes: Identifying Options for Your Client****Discussion Leader:** Dennis Riley, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 8:30-12**LEVEL:** Basic **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4DIRS

**COURSE OBJECTIVES AND DESCRIPTION:** Get the confidence and understanding you need to stand up to the Internal Revenue Service. Learn about what may trigger an audit, how to negotiate with the IRS, settle on appeal, and qualify for an IRS collection program. Represent your client with confidence and evaluate your client's best options for dealing with the IRS.

**June 1, 2015**

Monday  
Ridgeland  
MSCPA Center

**Estates and Trusts: Mastering Complex Income Tax Issues****Discussion Leader:** Dennis Riley, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 1:00-4:30**LEVEL:** Basic **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4ITET

**COURSE OBJECTIVES AND DESCRIPTION:** Protect your clients' assets and shield their estates from increased taxation brought about by the changing tax code. Understand the tax obligations of trusts and estates and how these obligations affect beneficiaries. This course provides exercises and examples that reflect the calculation and allocation of taxable income and its presentation on the appropriate forms.

**June 2, 2015**

Tuesday  
Ridgeland  
MSCPA Center

**Tax Planning Strategies for Small Businesses: Corporations, Partnerships, & LLCs****Discussion Leader:** Dennis Riley, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 8:30-12**LEVEL:** Intermediate **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4STSB

**COURSE OBJECTIVES AND DESCRIPTION:** Solid tax planning strategies are essential for your corporate and small business clients. Join us as we explore state-of-the-art planning ideas and tax-saving strategies to keep more of your client's money in their pockets. We'll answer the tough questions and show you what strategies are best for your clients as a result of the most recent tax reform.

**June 2, 2015**

Tuesday  
Ridgeland  
MSCPA Center

**Tax Consequences and Reporting Issues of LLCs, LLPs, LPs, and Other Partnerships****Discussion Leader:** Dennis Riley, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 1:00-4:30**LEVEL:** Basic **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4TLLO

**COURSE OBJECTIVES AND DESCRIPTION:** Is LLC and partnership taxation something new to you? Perhaps you have worked in this area for years but need a quick review of the fundamental concepts? Build a foundation of knowledge or freshen up your skills. This course addresses the tax consequences of the most common transactions engaged in by LLCs and partnerships. Develop a level of comfort with the basic conceptual framework underlying partnership and LLC taxation, with an emphasis on explaining the tax consequences associated with issues that are most frequently confronted by tax practitioners.

**June 3, 2015**

Wednesday  
Ridgeland  
MSCPA Center

**Accounting and Auditing Update****Discussion Leader:** Bill Eskin, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 8:30-12**LEVEL:** Update **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4AUAA

**COURSE OBJECTIVES AND DESCRIPTION:** Keep abreast of the fast-paced changes in accounting and auditing. This comprehensive course covers all the relevant pronouncements, exposure drafts, and other guidance recently issued in the accounting and auditing arenas. Let us sort through all of the complexities and help

you identify and apply recently issued FASB and ASB standards and guidance. With the rate of change in today's regulatory environment, you must stay current on all of the topics impacting the profession – don't get left behind!

**June 3, 2015**

Wednesday  
Ridgeland **New**  
MSCPA Center

### **Interpreting the New Revenue Recognition Standard: What All CPA's Need to Know**

**Discussion Leader:** Bill Eskin, CPA

**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0 **New**

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

**LEVEL:** Intermediate **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4INRR

**COURSE OBJECTIVES AND DESCRIPTION:** The new accounting standard for revenue recognition has finally been released! With the issuance of FASB ASU No. 2014-09, Revenue from Contracts with Customers, FASB has completed a convergence project with the IASB to improve financial reporting by creating common revenue recognition guidance for U.S. GAAP and IFRS. For years, revenue recognition has been the cause of audit failures and the focus of corporate abuse and fraud allegations.

**June 4, 2015**

Thursday  
Ridgeland **New**  
MSCPA Center

### **Engagement Essentials: Preparation of Financial Statements**

**Discussion Leader:** Bill Eskin, CPA

**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0 **New**

**Course Hours:** 8:30-12

**LEVEL:** Basic **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4PREP

**COURSE OBJECTIVES AND DESCRIPTION:** This course introduces the new requirements applicable to engagements to prepare financial statements contained in Statements on Standards for Accounting and Review Services (SSARS) No. 21: Statements on Standards for Accounting and Review Services: Clarification and Recodification, released in connection with the Accounting and Review Services Committee's SSARS Clarity project.

**June 4, 2015**

Thursday  
Ridgeland  
MSCPA Center

### **Fraud and Cash Receipts: Common Frauds and Internal Controls**

**Discussion Leader:** Bill Eskin, CPA

**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

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

**LEVEL:** Basic **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4RCR

**COURSE OBJECTIVES AND DESCRIPTION:** Revenue and cash receipts are two critical areas that require strong controls to prevent intentional fraud or unintentional misstatements. While there is well-publicized fraud in these areas in larger companies, it also occurs in smaller businesses and not-for-profit entities. A sound system of internal controls is needed to help prevent fraud. All too often, a "one-size-fits-all" system is put in place without considering the uniqueness of each entity. It is crucial that an internal control system is tailored so that the areas of greatest risk receive the most attention.

**June 5, 2015**

Friday  
Ridgeland  
MSCPA Center

### **Controller's Update: Today's Latest Trends**

**Discussion Leader:** John Cox, CPA

**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

**Course Hours:** 8:30-12

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

**COURSE OBJECTIVES AND DESCRIPTION:** Strengthen your abilities as a controller and help your management team understand current economic issues through the latest trends in accounting, finance, human resources, treasury management, and business systems. In this course you will discuss leading-edge topics in managerial accounting and finance in a session that is packed with useful tips and practical guidance that you can apply immediately.

**June 5, 2015**

Friday  
Ridgeland  
MSCPA Center

### **Analyzing Costs, Productivity, and Efficiency: Three Ways to Boost Your Bottom Line**

**Discussion Leader:** John Cox, CPA

**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

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

**LEVEL:** Intermediate **CPE Credit:** 4 General **VENDOR:** AICPA **ACRONYM:** CL4PYPL

**COURSE OBJECTIVES AND DESCRIPTION:** This hands-on workshop gives you specific ways to directly impact your organization's bottom line. These proven techniques for plugging the most-overlooked profit leaks come from specific strategies for lowering costs, improving productivity, and gaining efficiencies. Explore the different methods in-depth, see how easy they are to implement and what huge impact they can have on the bottom line. Each tool or strategy is one to pass on to clients and co-workers.



**June 8, 2015**

Monday

Ridgeland

MSCPA Center

**Buying and Selling a Business: Critical Tax and Structuring Issues****Discussion Leader:** Edward A. Harter, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** Surgent **ACRONYM:** SELL

**COURSE OBJECTIVES AND DESCRIPTION:** One of the major transactions CPA clients enter into is a purchase or disposition of a business. To help tax professionals in advising those clients, this course offers a comprehensive analysis of the business and tax aspects of buying and selling a business. It is a practical guide to help practitioners and industry CPAs understand structuring techniques. All CPAs, including controllers and executives in industry, should understand how difficult the process of buying and selling a business has become.

**June 9, 2015**

Tuesday

Ridgeland

MSCPA Center

**The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent****Discussion Leader:** Edward A. Harter, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Update **CPE Credit:** 8 Tax **VENDOR:** Surgent **ACRONYM:** BCPE

**COURSE OBJECTIVES AND DESCRIPTION:** Practitioners need to keep abreast of all tax changes affecting pass-through entities used by their business clients and employers, and this enlightening course delivers that information. You will learn invaluable knowledge, strategies, techniques, innovative tax-planning concepts, income-generating ideas, and other planning opportunities available to S corporations, partnerships, LLCs, and LLPs.

**June 9, 2015**

Tuesday

Tupelo

BancorpSouth Conf. Ctr.

**Driving Corporate Performance: The CFO's Role in Developing Competitive Advantage****Discussion Leader:** John Daly, MBA, CPA, CMA, CPIM**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 General **VENDOR:** Executive Ed **ACRONYM:** DCP

**COURSE OBJECTIVES AND DESCRIPTION:** Successful companies use strategies that allow them to use their resources efficiently. By focusing on doing one thing well, organizations can create a competitive advantage that provides them superior performance. Learn to create a roadmap to successful performance by tying the organization's metrics to its strategy and driving results.

**June 9, 2015**

Tuesday

Tupelo

BancorpSouth Conf. Ctr.

**Excel Best Practices****Discussion Leader:** William Fleenor, CPA**Cost:** Members: \$270 Non-Members: \$345 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 General **VENDOR:** K2 **ACRONYM:** EBP

**COURSE OBJECTIVES AND DESCRIPTION:** As spreadsheets continue to evolve, so too must your practices for creating, editing, and auditing them. In this program, you will gain an in-depth understanding of the best ways to work with Excel. The topics covered in this seminar include best practices associated with Excel spreadsheets in each of the following areas: creating and editing Excel workbooks, securing Excel workbooks, collaborating with others in Excel, and reporting on data contained in Excel. Today's best practices for Excel differ significantly from those used in the past and you will learn the best ways to work with Excel spreadsheets in this "must see CPE" program. For more details, please visit [www.k2e.com/ebp](http://www.k2e.com/ebp).

**June 10, 2015**

Wednesday

Ridgeland

MSCPA Center

**How to Settle an Estate for A Client From A TO Z****Discussion Leader:** Harris H. (Trip) Barnes, JD**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Basic **CPE Credit:** 8 Tax **VENDOR:** Surgent **ACRONYM:** SEAZ

**COURSE OBJECTIVES AND DESCRIPTION:** Federal estate and gift taxes currently affect few clients, but there are many other issues involved in settling an estate or administering a trust. Clients who are beneficiaries of a trust or estate often turn to their financial advisors to understand the administrative process and its effect on their interests. This course enables the accountant to cut through the jargon to understand the legal concepts, communicate a real-world explanation to clients, and serve, in some instances, as an executor or trustee or as an advisor to them. After taking this course, practitioners will feel more confident about serving in a fiduciary capacity.

**June 10, 2015**

Wednesday

Tupelo

BancorpSouth Conf. Ctr.

**Know Your Cost: Double Your Profit****Discussion Leader:** John Daly, MBA, CPA, CMA, CPIM**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 General **VENDOR:** Executive Ed **ACRONYM:** KYC

**COURSE OBJECTIVES AND DESCRIPTION:** Companies with poor cost information make bad decisions about products that are not "average". Poor information causes companies to overprice easy, high-volume "gravy" products and underprice difficult, low-volume "dog" products. Regardless of whether your company sells goods or services, learn how to double your profit by giving the dogs to your competitor and keep the gravy for yourself.

**June 10, 2015**

Wednesday

Tupelo

BancorpSouth Conf. Ctr.

**Technology for CPAs - Don't Get Left Behind****Discussion Leader:** William Fleenor, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Basic **CPE Credit:** 8 General **VENDOR:** K2 Technologies **ACRONYM:** TEC

**COURSE OBJECTIVES AND DESCRIPTION:** How good are you with the technology you use daily? What new technology tools are available that could save you time and make you more effective? Technology continues to accelerate rapidly, and CPAs need to keep pace. This course is designed for those who are not information technology (IT) experts, but who needs an update of their base-knowledge level to serve their companies and/or clients more efficiently and effectively. In this fast-paced, update-style course, you will survey today's IT environment, learning about computer hardware, software, operating systems (including Windows 8 and what it means for you), and peripheral devices. You will also learn about significant trends in information technology and how to take advantage of the opportunities presented by these trends. For more details, please visit [www.k2e.com/tec](http://www.k2e.com/tec).

**June 11, 2015**

Thursday

Ridgeland

MSCPA Center

**Advanced Controller and CFO Skills****Discussion Leader:** Vincent Flynn, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 8:30-4:30**LEVEL:** Advanced **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** ACCS-2

**COURSE OBJECTIVES AND DESCRIPTION:** This course examines best practices of leading-edge controllers and CFOs. Demonstrate your advanced skills that add value and contribute to the success of the organization. You will learn 10 specific skills every CFO or controller needs to be successful, and you will find that you suddenly have more power and influence than you ever thought possible. Show the company's leadership how vital you are to their profitability!

**June 11, 2015**

Thursday

Tupelo

BancorpSouth Conf. Ctr.

**Annual Update for Preparation, Compilation, and Review Engagements****Discussion Leader:** Dr. James Crockett**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 8:30-4:30**LEVEL:** Update **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** CORU-1

**COURSE OBJECTIVES AND DESCRIPTION:** A go-to reference for training staff and managing your preparation, compilation, and review engagements, this course will enable you to be in compliance with all of the professional standards surrounding engagements performed in accordance with Statements on Standards for Accounting and Review Services (SSARS). A practice-oriented review of the latest developments, cases, and lively discussion among the experienced participants make this class informative and practical. The course covers the entire spectrum of practitioner concerns and introduces the new requirements applicable to engagements to prepare financial statements contained in SSARS No. 21, Statements on Standards for Accounting and Review Services: Clarification and Recodification, released in connection with the Accounting and Review Services Committee's SSARS Clarity project.

**June 11, 2015**

Thursday

Tupelo

BancorpSouth Conf. Ctr.

**Ethics, Rules, and Regulations****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 8:30-12**LEVEL:** All **CPE Credit:** 4 Ethics **VENDOR:** Self-Developed **ACRONYM:** ERR-3

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

**June 11, 2015**

Thursday

Tupelo

BancorpSouth Conf. Ctr.

**Health Care Reform Act: Critical Tax and Insurance Ramifications****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 1:00-4:30**LEVEL:** Basic **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4HCRA-3

COURSE OBJECTIVES AND DESCRIPTION: The Health Care Reform Act continues to be phased in this year and in future years.

This seminar will help you better understand the impact of the Act so you can describe to your clients how health care and paying for coverage will change in the future. In addition, you'll discover how to use this information for tax planning opportunities. This topic is constantly changing so make sure you're up-to-date on the latest information.

**June 12, 2015**

Friday

Ridgeland

**New**

MSCPA Center

**Transforming Your Role as Controller to Business Partner****Discussion Leader:** Bill Moss, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30 **New****Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 General **VENDOR:** AICPA **ACRONYM:** COBP

COURSE OBJECTIVES AND DESCRIPTION: Are you ready to take your role as controller to the next level while adding significant value to the organization? A successful Controller will go beyond financial statements, internal controls and general accounting to create new value for the organization. We'll explore new additional roles that controllers are now accepting and outline a roadmap you can use to expand your role as a controller from simply internal process/transaction oriented to externally focused understanding of industry and macro trends.

**June 15, 2015**

Monday

Ridgeland

MSCPA Center

**Audits of HUD-Assisted Projects****Discussion Leader:** Cecil M. (Bill) Felder, CPA, CISA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 8:30-4:30**LEVEL:** Basic **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** HUD

COURSE OBJECTIVES AND DESCRIPTION: Do your audits of HUD-assisted projects make the grade? Receive high marks when you are well-versed on HUD organizations, programs, policies, and procedures. Learn how to discern the various audit requirements for HUD programs and how to comply with specific HUD regulations, contracts, and procedures. Plus, review the latest developments on professional standards affecting particular federal programs and how they impact your audits.

**June 15, 2015**

Monday

Ridgeland

Holmes CC

**Cases in Corporate Ethics: Discuss Real Life Conflicts****Discussion Leader:** Don Minges, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 8:30-12**LEVEL:** Intermediate **CPE Credit:** 4 Ethics **VENDOR:** Executive Ed **ACRONYM:** CCE

COURSE OBJECTIVES AND DESCRIPTION: Anyone who has ever attended a lecture-format ethics seminar knows that there is a better way. "Cases in Corporate Ethics" provides an opportunity for lively group discussion of actual real world ethical dilemmas. "Cases in Corporate Ethics" examines eight cases drawn from real-life business conflicts involving corporate financial managers. This Includes the Mississippi Rules and Regulations requirement.

**June 15, 2015**

Monday

Ridgeland

**New**

Holmes CC

**Cash Management Techniques, Systems & Solutions: Make Your Money Work Harder****Discussion Leader:** Don Minges, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0 **New****Course Hours:** 1:00-4:30**LEVEL:** Intermediate **CPE Credit:** 4 General **VENDOR:** Executive Ed **ACRONYM:** CMT

COURSE OBJECTIVES AND DESCRIPTION: Are you managing your cash, or is your cash managing you? Can you effectively project cash position a week, month or a year from now? This seminar demonstrates how to develop long term and short-term cash management processes, allowing for restful nights and productive days. This session provides timeless cash management techniques and strategies.



**June 16, 2015**

Tuesday  
Ridgeland  
MSCPA Center

**Construction Contractors Advanced Issues****Discussion Leader:** Andrew Copeland, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 8:30-4:30**LEVEL:** Advanced **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** CCAI

**COURSE OBJECTIVES AND DESCRIPTION:** The construction industry comes with many advanced accounting issues, audit procedures, and tax issues, which makes construction contractor engagements inherently higher risk than other engagements. As a result, practitioners and financial professionals should be prepared to address difficult issues such as look-back calculations, measuring progress of contracts, overhead allocations, and internal controls for construction contractors. Learn about some of the most pervasive issues in the construction industry and how to identify and manage the risks inherent with construction contractor engagements.

**June 16, 2015**

Tuesday  
Ridgeland  
Holmes CC

**Acquisitions to Grow the Business: Strategy, Structure, Integration & Due Diligence****Discussion Leader:** Don Minges, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 General **VENDOR:** Executive Ed **ACRONYM:** AGB

**COURSE OBJECTIVES AND DESCRIPTION:** Mergers, acquisitions and alliances have been — and will continue to be — major avenues to organizational growth and increased competitive advantage. Yet, in spite of the great initial promise of many business mergers and alliances, few seem to yield the anticipated results. Numerous studies indicate that between 55% and 77% fail in their intended purpose. This course helps CFOs, controllers and their advisors identify, negotiate and consummate mergers and acquisitions that create shareholder value and avoid the many traps, which can cause post-acquisition failure.

**June 17, 2015**

Wednesday  
Ridgeland  
MSCPA Center

**Determining How Much Money You Need to Retire, and Tax Ideas and Money Management in Retirement****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** Surgent **ACRONYM:** DRMM

**COURSE OBJECTIVES AND DESCRIPTION:** The purpose of this course is to give CPAs the tools and knowledge required to help their clients implement tax-effective investment and portfolio strategies for successful wealth accumulation and real after-tax retirement income maintenance. The course discusses a host of specific investment tax planning and money management issues and topics, both before and after retirement, within the broader context of the fundamentals of asset allocation and portfolio management, coordinating retirement plans and taxable saving, advanced tax-adjusted time value principles, and asset risk/return and income-tax relationships.

**June 17, 2015**

Wednesday  
Ridgeland  
Holmes CC

**Surgent's Handbook for Mastering Basis, Distributions, and Loss Limitation Issues for S Corporations, LLCs, and Partnerships****Discussion Leader:** Arthur Auerbach, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** Surgent **ACRONYM:** HMBI

**COURSE OBJECTIVES AND DESCRIPTION:** The most difficult concepts to master when dealing with flow-through business entities are the basis and distribution concepts. Major error and malpractice issues occur if the CPA does not fully understand the impact of these rules. This course is designed to focus on the practical applications of these rules.

**June 18, 2015**

Thursday  
Ridgeland  
MSCPA Center

**MBA in a Day!****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 General **VENDOR:** Surgent **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.

**June 18, 2015**

Thursday  
Ridgeland  
Holmes CC

**The Best Income Tax, Estate Tax, and Financial Planning Ideas of 2015****Discussion Leader:** Arthur Auerbach, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** Surgent **ACRONYM:** IEFP

**COURSE OBJECTIVES AND DESCRIPTION:** With higher tax rates for individuals and trusts, tax planning takes on more importance. Plus, with Social Security going bust and interest rates at an all-time low, new ideas for financial planning for retirement must be considered. The purpose of this course is to explore practical tax planning ideas that practitioners can use to assist clients with their needs. This course is crucial for CPAs who are looking for good ideas that can save clients money!

**June 19, 2015**

Friday  
Ridgeland **New**  
MSCPA Center

**Internal Controls and Risk Assessment: Key Factors in a Successful Audit****Discussion Leader:** Jerry Spratt, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30 **New****Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** ICRA

**COURSE OBJECTIVES AND DESCRIPTION:** Under generally accepted auditing standards (GAAS), all auditors are required to follow a risk-based approach to auditing. The consideration of internal control is key to risk assessment and to the determination of overall audit approach. Understand the requirements in a financial statement audit for understanding internal control and assessing the design and implementation thereof. The focus of this course is to help you get it right! Throughout the course we'll enhance your understanding with exercises designed to illustrate how the concepts apply to practical audit situations.

**June 19, 2015**

Friday  
Ridgeland  
Holmes CC

**Advanced Partnership/LLC Workshop: How to Do Optional Step-Up in Basis Under Section 754 and Related Provisions****Discussion Leader:** Arthur Auerbach, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Advanced **CPE Credit:** 8 Tax **VENDOR:** Surgent **ACRONYM:** APLW

**COURSE OBJECTIVES AND DESCRIPTION:** This course explores the practical issues in the many instances in which a step-up in basis can create tax advantages for partners and members. This course includes case studies to illustrate the critical points.

**June 22, 2015**

Monday  
Ridgeland  
MSCPA Center

**Estate and Life Planning Issues for the Middle-Income Client****Discussion Leader:** Pamela Davis-Vaughn, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Basic **CPE Credit:** 8 Tax **VENDOR:** Surgent **ACRONYM:** PMIC

**COURSE OBJECTIVES AND DESCRIPTION:** Clients think that estate planning only applies to the very rich. In truth, there are many issues of critical concern for which the middle-income client needs to plan. This course is a must-attend for all CPAs who work with middle-income clients and are looking for ways to provide additional quality services.

**June 22, 2015**

Monday  
Gulfport  
Marriott Courtyard

**Social Security, Medicare, and Prescription Drug Retirement Benefits: What Every Baby Boomer Needs to Know Now****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Basic **CPE Credit:** 8 Tax **VENDOR:** Surgent **ACRONYM:** SSRB-2

**COURSE OBJECTIVES AND DESCRIPTION:** Social Security seems poised for changes in benefits and eligibility age. As the baby boomer generation approaches retirement, financial and tax planners can expect increased demand for strategies that dovetail Social Security with other retirement objectives. This course provides tax and financial planning professionals with both the background information on the Social Security system and the strategies clients will need in dealing with it.

**June 22, 2015**

Monday  
Gulfport  
Marriott Courtyard

**Advanced Controller and CFO Skills****Discussion Leader:** Curtis Quickel, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 8:30-4:30**LEVEL:** Advanced **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** ACCS-3

**COURSE OBJECTIVES AND DESCRIPTION:** This course examines best practices of leading-edge controllers and CFOs. Demonstrate your advanced skills that add value and contribute to the success of the organization. You will learn 10 specific skills every CFO or controller needs to be successful, and you will find that you suddenly have more power and influence than you ever thought possible. Show the company's leadership how vital you are to their profitability!

**June 23, 2015**

Tuesday

Gulfport

**New**

Marriott Courtyard

**Securing Your Data - Practical Tools for Protecting Information****Discussion Leader:** Steven Phelan, CPA, CITP**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0 **New****Course Hours:** 8:30-12**LEVEL:** Intermediate **CPE Credit:** 4 General **VENDOR:** K2 **ACRONYM:** SEC4-2

**COURSE OBJECTIVES AND DESCRIPTION:** How do you encrypt sensitive information? How do you acquire and use e-signatures? What are the security tools you need and how do you use them to secure your sensitive data and systems? Security is not optional and yesterday's security techniques are not working as effectively as they once were. It's time to tune up what you know about protecting sensitive data. Security failures, such as a breach of client or customer data, are costly – they can even drive an organization out of business. In this course, participants learn about the latest tools and techniques for encryption, virus protection, secure communications, secure authentication, and more. The course is taught by explaining and demonstrating each of these tools and techniques. Participants learn current best practices in information security and how to help their organizations avoid the effects of poor decisions in managing information security. This course is new for 2015! For more details, please visit [www.k2e.com/sec-4](http://www.k2e.com/sec-4).

**June 23, 2015**

Tuesday

Gulfport

Marriott Courtyard

**Technology Update****Discussion Leader:** Steven Phelan, CPA, CITP**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 1:00-4:30**LEVEL:** Intermediate **CPE Credit:** 4 General **VENDOR:** K2 **ACRONYM:** TUP4-2

**COURSE OBJECTIVES AND DESCRIPTION:** Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the cloud, security, and other technology-related issues? If you answered "yes" to any of these questions, then make plans now to invest four hours in this fast-paced and highly informative seminar that is sure to ramp up your return on technology investment. The technology tools available to all have never been better, but many are not taking full advantage of these tools. This course helps professionals at all levels understand the major trends in hardware, software, and services and how to utilize these tools to meet organizational objectives both efficiently and effectively. More than just a seminar on the latest computers, you will learn about the full spectrum of practical technology available to you and your team and how to implement these tools for maximum impact. "Excellent class, full of pertinent and useful information." G.P., CPAAL For more details, please visit [www.k2e.com/tup-4](http://www.k2e.com/tup-4).

**June 23, 2015**

Tuesday

Gulfport

Marriott Courtyard

**Ethics, Rules, and Regulations****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 8:30-12**LEVEL:** All **CPE Credit:** 4 Ethics **VENDOR:** Self-Developed **ACRONYM:** ERR-4

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

**June 23, 2015**

Tuesday

Gulfport

Marriott Courtyard

**Health Care Reform Act: Critical Tax and Insurance Ramifications****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 1:00-4:30**LEVEL:** Basic **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4HCRA-4

**COURSE OBJECTIVES AND DESCRIPTION:** The Health Care Reform Act continues to be phased in this year and in future years. This seminar will help you better understand the impact of the Act so you can describe to your clients how health care and paying for coverage will change in the future. In addition, you'll discover how to use this information for tax planning opportunities. This topic is constantly changing so make sure you're up-to-date on the latest information.

**June 23, 2015**

Tuesday

Ridgeland

MSCPA Center

**Not-for-Profit Accounting & Reporting: From Start to Finish****Discussion Leader:** William (Bill) Wagner, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 A&A/YB **VENDOR:** AICPA **ACRONYM:** NPAR

**COURSE OBJECTIVES AND DESCRIPTION:** Rather than training to run part of the race, train to run the entire race from start to finish. This course trains you to clear key hurdles in not-for-profit accounting and reporting in an efficient and effective manner. Avoid the potholes of confusion and finish first by providing a financial picture that end users can truly understand.



**June 24, 2015**

Wednesday

Gulfport

Marriott Courtyard

**Yellow Book: Government Auditing Standards****Discussion Leader:** Cecil M. (Bill) Felder, CPA, CISA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 8:30-4:30**LEVEL:** Basic **CPE Credit:** 8 **A&A/YB** **VENDOR:** AICPA **ACRONYM:** EOYB-2

**COURSE OBJECTIVES AND DESCRIPTION:** Do you perform engagements in accordance with Generally Accepted Government Auditing Standards (GAGAS or GAS or the "Yellow Book")? This course provides an excellent baseline of information to accountants in understanding governmental auditing foundations, ethics, general audit standards, financial audit standards, attestation engagement standards, field work standards, and reporting standards for performance audits. It is essential that all auditors planning and conducting audits in accordance with Government Auditing Standards understand and be able to discern these concepts and standards in executing their responsibilities.

**June 24, 2015**

Wednesday

Gulfport

Marriott Courtyard

**Cloud Computing****Discussion Leader:** Steven Phelan, CPA, CITP**Cost:** Members: \$270 Non-Members: \$345 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 General **VENDOR:** K2 **ACRONYM:** CLC

**COURSE OBJECTIVES AND DESCRIPTION:** The Future is Here! "Cloud Computing." You've heard the term, but what does it really mean and how will it impact you both personally and professionally? In this seminar, you will learn the fundamentals of cloud computing, including what cloud computing really is and how it differs from hosted services. The course then shifts into a discussion to help you understand if cloud computing might be right for your organization or for your clients. From there, you will learn about the leading providers of cloud-based services and which of their solutions might be right for your organization or for your clients. begin increasing the return on your investment in technology. A special focus of this seminar is the impact that cloud computing will have on the accounting profession, regardless of whether you work in public accounting, industry, or for governmental, educational, or not-for-profit institutions. For more details, please visit [www.k2e.com/clc](http://www.k2e.com/clc).

**June 24, 2015**

Wednesday

Ridgeland

MSCPA Center

**Yellow Book: Government Auditing Standards****Discussion Leader:** William (Bill) Wagner, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 8:30-4:30**LEVEL:** Basic **CPE Credit:** 8 **A&A/YB** **VENDOR:** AICPA **ACRONYM:** EOYB-1

**COURSE OBJECTIVES AND DESCRIPTION:** Do you perform engagements in accordance with Generally Accepted Government Auditing Standards (GAGAS or GAS or the "Yellow Book")? This course provides an excellent baseline of information to accountants in understanding governmental auditing foundations, ethics, general audit standards, financial audit standards, attestation engagement standards, field work standards, and reporting standards for performance audits. It is essential that all auditors planning and conducting audits in accordance with Government Auditing Standards understand and be able to discern these concepts and standards in executing their responsibilities.

**June 25, 2015**

Thursday

Ridgeland

**New**

MSCPA Center

**Recognizing and Responding to Fraud Risk in Governmental and Not-for-Profit Organizations****Discussion Leader:** William (Bill) Wagner, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30 **New****Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 **A&A/YB** **VENDOR:** AICPA **ACRONYM:** FRGNP

**COURSE OBJECTIVES AND DESCRIPTION:** Recognizing fraud risks in governmental and not-for-profit organizations is often challenging due to the inherent nature of these organizations. In addition to their public nature, these organizations may have limited support staff or staff with limited accounting expertise which can result in less than effective fraud prevention and detection programs and/or increased opportunities for fraud. Using a combination of examples, explanations of audit standards, and case studies, obtain an understanding of the frauds most commonly perpetrated in government and not-for-profit organizations and what prevention and detection procedures are effective in responding to these fraud risks.

**June 26, 2015**

Friday

Ridgeland

MSCPA Center

**Governmental and Not-for-Profit Annual Update****Discussion Leader:** William (Bill) Wagner, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 8:30-4:30**LEVEL:** Update **CPE Credit:** 8 **A&A/YB** **VENDOR:** AICPA **ACRONYM:** GNAU

**COURSE OBJECTIVES AND DESCRIPTION:** Change is inevitable and at times overwhelming if you are unprepared. Ensure you are current in governmental and not-for-profit accounting and auditing. This update course is designed to prepare you for the latest accounting and auditing developments affecting governments and not-for-profits.

**June 29, 2015**

Monday

Ridgeland

MSCPA Center

**Annual Update for Preparation, Compilation, and Review Engagements****Discussion Leader:** Dr. James Crockett**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 8:30-4:30**LEVEL:** Update **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** CORU-2

**COURSE OBJECTIVES AND DESCRIPTION:** A go-to reference for training staff and managing your preparation, compilation, and review engagements, this course will enable you to be in compliance with all of the professional standards surrounding engagements performed in accordance with Statements on Standards for Accounting and Review Services (SSARS).

**June 29, 2015**

Monday

Ridgeland

Holmes CC

**Excel Tables - Revolutionize How You Work with Excel!****Discussion Leader:** Thomas G. Stephens, CPA, CITP**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 8:30-12**LEVEL:** Intermediate **CPE Credit:** 4 General **VENDOR:** K2 **ACRONYM:** EXT-4

**COURSE OBJECTIVES AND DESCRIPTION:** Added to Excel with the 2007 release, Tables are one of Excel's best features about which most users know very little and, therefore, fail to experience the benefits of working with this great feature. Much more than just a formatting tool, Tables will revolutionize how you work with data in Excel. Tables can serve as data sources that automatically and dynamically re-size to match the volume of data under analysis; Tables provide a simplified means of writing formulas known as Structured Referencing; Tables contain advanced filtering and sorting capabilities; and Tables streamline the process of working with large volumes of data. If you are using Excel 2007 or newer versions and are not working with Tables, then you need this four-hour course to increase your efficiency and proficiency with Excel. For more details, please visit [www.k2e.com/ext-4](http://www.k2e.com/ext-4).

**June 29, 2015**

Monday

Ridgeland

Holmes CC

**New****Tech Tools and Gadgets for a More Efficient You!****Discussion Leader:** Thomas G. Stephens, CPA, CITP**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0 **New****Course Hours:** 1:00-4:30**LEVEL:** Intermediate **CPE Credit:** 4 General **VENDOR:** K2 **ACRONYM:** TTG

**COURSE OBJECTIVES AND DESCRIPTION:** Technology, and specifically the ever-evolving world of tools and gadgets, continues to awe and amaze and "The Internet of Things" is rapidly turning this evolution into a revolution. Learning how to take advantage of these tools and gadgets can enhance both personal and team productivity. In this seminar, you will learn how to take advantage of many features in tools that you likely already own – such as Microsoft Windows and Microsoft Office – to become more productive. You will also learn about numerous cloud-based applications and services, and you will witness demonstrations of leading tools, gadgets, and apps – many of which won't cost you anything – designed to make you more efficient, effective, and productive. This course is new for 2015! For more details, please visit [www.k2e.com/ttg-4](http://www.k2e.com/ttg-4).

**June 30, 2015**

Tuesday

Ridgeland

MSCPA Center

**Ethics, Rules, and Regulations****Discussion Leader:** Donna Ingram, CPA, CFE**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 8:30-12**LEVEL:** All **CPE Credit:** 4 Ethics **VENDOR:** Self-Developed **ACRONYM:** ERR-5

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

**June 30, 2015**

Tuesday

Ridgeland

MSCPA Center

**New****The ABCs of Fraud and Forensic Accounting****Discussion Leader:** Donna Ingram, CPA, CFE**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0 **New****Course Hours:** 1:00-4:30**LEVEL:** Basic **CPE Credit:** 4 A&A **VENDOR:** Self-Developed **ACRONYM:** CL4FFF-1

**COURSE OBJECTIVES AND DESCRIPTION:** In this session you will learn how to improve your forensic accounting skills, develop a fraud investigation process and discuss the roles and responsibilities of the victim, investigator and expert in fraud examinations.

**June 30, 2015**

Tuesday

Ridgeland

Holmes CC

**Excel-Based Dashboards****Discussion Leader:** Thomas G. Stephens, CPA, CITP**Cost:** Members: \$270 Non-Members: \$345 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Advanced **CPE Credit:** 8 General **VENDOR:** K2 **ACRONYM:** EBD

**COURSE OBJECTIVES AND DESCRIPTION:** Getting Better Information, Now! Dashboard reporting is rapidly becoming the norm for organizations seeking to improve financial and operational reporting processes. Dashboards allow recipients easy access to mission-critical data, usually in an on-demand environment, thereby allowing users to get the information they need when they need it. With greatly enhanced charting and graphing capabilities, along with the ability to handle much larger volumes of data, Excel is an ideal tool for creating high-impact dashboards in businesses of all sizes. For more details, please visit [www.k2e.com/ebd](http://www.k2e.com/ebd).



## Continuing Professional Education Registration

Mail this form and payment to: The Mississippi Society of Certified Public Accountants

306 Southampton Row, Ridgeland, MS 39157

or fax to: 601-856-8255 Phone: 601-856-4244 In-state: 800-772-1099

If you have special needs under the Americans with Disability Act, attach a written description, call us, or email [mary@ms-cpa.org](mailto:mary@ms-cpa.org)

Please print or type – one form per person. Form may be reproduced for multiple registrations.

Last Name	First Name	M.I.	<b>REFUND POLICY:</b> You will receive a full refund if cancellation is made seven calendar days prior to the scheduled date of the event. If you cancel within the seven days, a 50% refund will be made. No refunds are made for same-day cancellations or for no-shows. However, you may substitute another person from your office.  <b>PHOTO POLICY:</b> MSCPA or its contractors may be photographing or videotaping MSCPA events. Attendees agree to allow their image to be used in MSCPA publications, web site, marketing materials, and the media. Attendance at MSCPA events waives the MSCPA from liability resulting from these uses.
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CPAs who are members of the MSCPA may register at the "member" rate. **Non-CPA staff may also register at the "member" rate.** CPAs who are not a member of the MSCPA may participate by registering at the Non-Member rate. Please include the qualifying discount(s) when registering for events.

\* CPAs who are a members of the AICPA may deduct \$30 per day from 8- or 16-hour AICPA seminars ONLY. (These are identified in the CPE Catalog). This discount must be taken when registering. **Non-CPA staff are NOT eligible for the AICPA discount. Seminars from other vendors are not eligible for this discount.**

\*\*\* **ELECTRONIC MATERIALS** \_\_\_\_\_ (SOME CONFERENCES WILL BE ELECTRONIC ONLY, please check the website) \*\*\*  
**PRINTED MATERIALS** \_\_\_\_\_

### DESIRED CPE EVENTS

Course Date	City	Course Title	Course Acronym	Course Fee		Adjustment * AICPA Discount	Subtotal
				MSCPA Member	Non-Member		
<b>TOTAL</b>							<b>\$</b>

### PAYMENT INFORMATION:

**Check:** I have enclosed a check payable to MSCPA in the amount of \$ \_\_\_\_\_

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**Please Indicate:** ☐ Personal Card ☐ Firm / Company Card I authorize the MSCPA to charge \$ \_\_\_\_\_ to the credit card below:

Credit Card Number \_\_\_\_\_

Expiration Date \_\_\_\_\_

CCID Number \* \_\_\_\_\_

\* The Credit Card ID Number (CCID) is located on the back of MasterCard, Visa and Discover credit or debit cards and is typically a separate group of 3 digits to the right of the signature strip. On American Express cards, the Card Security Code is a printed (NOT embossed) group of 4 digits on the front towards the right.

**BILLING ADDRESS FOR CREDIT CARD:** Address \_\_\_\_\_  
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## CLASSIFIEDS

continued from page 32

### CPA PRACTICE FOR SALE IN OXFORD:

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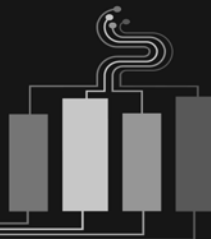
# 2015 Committee Day

Thursday, May 14, 2015

**MSCPA Building**  
**Ridgeland**

See page 4 for details

## What Don't You Know About Your Business?



## Or Your Client's Business?

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## CLASSIFIEDS

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continued on page 31