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MSCPA Launches New Website

www.ms-cpa.org

As part of our continued commitment to ensuring that our members receive the tools and benefits they need to succeed in our industry, the MSCPA is excited to reveal our brand new website.

Some Quick Notices

- MSCPA members with an e-mail can recover their account using the "forgot password" tool.
- If you didn't have an e-mail associated with your MSCPA profile, please give us a call at 601-856-4244 for assistance.
- Members will be able to pay for dues, CPE registrations (including convention), and PAC and Education Foundation contributions online.
- Review your information on the **Update Your Profile** page and include your Fields of Interest and Areas of Expertise so MSCPA can better serve you. Here you can also upload a picture for your profile, opt in to have your information included the Find a CPA directory as well as volunteer for a committee.
- Firm admins will be able to manage your firm on the **My Firm** page by adding new firm members and editing existing ones or creating additional branches for your growing firm. Firm admins will also be able to print or pay your firm employees dues. Contact Jennie Truhett, jtruhett@ms-cpa.org to be added as a firm admin.

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MSCPA

MISSISSIPPI SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS

VOLUME XLVIII

APRIL 2017

MSCPA Chairman-Elect Bill Taylor Names Committee Chairmen for 2017-2018

MSCPA Chairman-Elect Bill Taylor has named Committee Chairmen to serve in the 2017-2018 fiscal year. Representatives of the millennial generation have been named as Millennial Chairs.

Accounting & Auditing	Chris Savell, <i>Ridgeland</i>
Advisory to State Board.....	Ed Jones, <i>Pascagoula</i>
Awards, Education & Scholarships	Annette Pridgen, <i>Jackson</i>
Banking.....	James Pegues, <i>New Albany</i>
Business Valuation & Litigation Support	Annette Herrin, <i>Hattiesburg</i>
Continuing Professional Education.....	Bill Felder, <i>Ridgeland</i>
Firm Administration & Development	Beth Burgess, <i>Flowood</i>
Governmental Accounting & Auditing.....	Scott Adams, <i>Natchez</i>
Health Care Services	Linda Trifone, <i>Jackson</i>
Industry	Kristy Launius, <i>Jackson</i>
Insurance Trust.....	Lance Mize, <i>Nashville</i>
Legislation.....	Linda Keng, <i>Jackson</i>
Long Range Planning.....	Jerry Goolsby, <i>Jackson</i>
Non-Profits	Jackie Bailey, <i>Jackson</i>
Peer Review.....	Mike Gladney, <i>Jackson</i>
Professional Conduct	Morgan Geoghagan, <i>Brandon</i>
Taxation	Donna Bruce, <i>Jackson</i>
Young CPAs Liaison.....	Shanell Watson, <i>Jackson</i>

Millennial Chairman: Shannon Adams, *Ridgeland*

Millennial Chairman: Josh Norris, *Jackson*

Millennial Chairman: Shanell Watson, *Jackson*

Millennial Chairman: Phillip Branch, *Ridgeland*

Millennial Chairman: Robert King, Jr., *Hattiesburg*

Millennial Chairman: Yale Murphy, *Ridgeland*

Millennial Chairman: Katie Feibelman, *Vicksburg*

Millennial Chairman: Lydia Windham, *Jackson*

Millennial Chairman: Julia Jesuit, *Ridgeland*

Millennial Chairman: Allison Garner, *Oxford*

Co-Chairman: Jimmy Stokes, *Gulfport*

Millennial Chairman: Caitlin Goodman, *Natchez*

Millennial Chairman: Matt Bailey, *Jackson*

Millennial Chairman: Wil Crawford, *Jackson*

Co-Chairman: Charles Lindsay, *Ridgeland*

Millennial Chairman: Julia Bradley, *Ridgeland*

Millennial Chairman: Cathy Slocum, *Magee*

Millennial Chairman: Tolliver McMullen, *Ridgeland*

Millennial Chairman: Carr Hammond, *Natchez*

Millennial Chairman: Melanie Hamel, *Ridgeland*



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by the
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Certified Public Accountants*

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

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

Welcome New Members

New members include Suzanne Stalnaker Allmon, Pamela Joyce Belk, Jacquelin Danielle King, Blair Hardem Jussely, Bradley Gray Littlejohn, Allana Madison McKay, and Ryan Rex Robertson. Now completing the membership process are:

James Philip Bellipanni was born in Indianola and received a Bachelor of Business Administration from Delta State University and a Master of Professional Accountancy from Mississippi State University. He is an Assurance Senior Associate with HORNE LLP in Ridgeland.

Phillip J. Chu was born in China and received a B.S.B.A. - Accountancy from The University of Southern Mississippi. He is an Accountant/Auditor Professional 2 with the Mississippi Department of Transportation in Jackson.

Randa Lee Craig was born in Slidell, Louisiana and received a Bachelor of Business Administration and Master of Business Administration from Mississippi College. She is a Senior Internal Auditor with Poolcorp in Covington, Louisiana.

Daniel Garrison Eveland was born in Madisonville, Kentucky and received a BBA Marketing & Management from the University of Kentucky and a MBA from the University of Mississippi. He is an Associate with HORNE LLP in Ridgeland.

Robert Elwood Gibbs was born in New York, New York and received a BA Economics from University of Pennsylvania and a Pre CPA from University of New Orleans. He is a Senior Analyst with Entergy Services, Inc. in Clinton.

Thomas Frank Givens was born in Memphis, Tennessee and received a Bachelor and Master of Accounting from the University of Mississippi. He is a CPA with F O Givens & Co. in Senatobia.

Katelyn K. Gottberg was born in Jacksonville, Florida and received a Bachelor of Business from Mississippi State University and a Master of Taxation from Georgia State University. She is a Senior Accountant with BKD in Jackson.

James William Henley, Jr. was born in Jackson and received a Bachelor from University of Mississippi and a Certificate of Accounting from Mississippi College. He is a Senior Accountant with Harper, Rains, Knight & Company in Ridgeland.

Vinicius Neves Hiratuka was born in Araraquara, SP-Brazil and received a

BSBA Accounting from Mississippi College and a MAcc Accounting from Vanderbilt University. He is a Portfolio Advisor with Horne Wealth Advisors in Ridgeland.

John Carpenter Ingram was born in Vicksburg and received a Bachelor of Accountancy from Mississippi State University. He is a Staff Accountant with GranthamPoole in Ridgeland.

Kylie Rowell Joiner was born in Meridian and received a BSBA with Emphasis in Accounting from The University of Southern Mississippi and a Master of Business Administration from Mississippi State University. She is a Senior Staff Auditor with Alexander, Van Loon, Sloan, Levens, & Favre, PLLC in Gulfport.

Byron Claude Porter was born in Canton and received a Bachelor and Master from The University of Southern Mississippi. He is a Senior Associate with PwC in Houston, Texas.

Ty Michael Pulliam was born in Laurel and received an AA from Jones County Junior College and a BACC from Mississippi State University. He is an Assurance Senior Associate with HORNE LLP in Ridgeland.

Leigh Everett Taylor was born in Birmingham, Alabama and received a Bachelor of Accountancy and a Master of Professional Accountancy from Mississippi State University. She is a Manager, Contract Audit with the Mississippi Office of the State Auditor in Jackson.

LEADERSHIP LUNCHEON

The 4th annual leadership luncheon to kick off the new fiscal year is scheduled for May 11 from 11:30 a.m. to 12:45 p.m. in the MSCPA Training Center in conjunction with Committee Day for incoming/outgoing Committee Chairmen, incoming/outgoing Millennial Chairmen, AICPA Council Representative, candidates for office this year, MSCPA officers, and Young CPA Network officers. Guest speaker will be Randy Pierce, CPA, JD, Director of the Mississippi Judicial College and former Mississippi Supreme Court Justice.

MSCPA Committee Day Set for **May 11, 2017**

Volunteer for Service

MSCPA Committees meet Thursday, May 11 for Committee Day at the MSCPA Training Center and members are encouraged to volunteer for committee service by April 30.

To view the current committee rosters, members can login at www.ms-cpa.org and click Members > Committees. To volunteer for a committee, members can update your profile (Members > Update My Profile) and select to join a committee that is currently accepting volunteers. If you would like more information about volunteering for committees, please contact Karen Moody at kmoody@ms-cpa.org.

A confirmation will be sent to the committee member with details on your committee meeting on May 11. 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 11:

MORNING:

Accounting & Auditing
Continuing Professional Development (CPE)
Firm Administration & Development
Governmental Accounting & Auditing
Health Care Services
Not-For-Profit
Young CPA Liaison

AFTERNOON:

Business Valuation & Litigation
Industry
Insurance Trust
Legislation
Long Range Planning
Taxation

The following committees will meet on alternate dates: Advisory to State Board, Awards, Education & Scholarships (May 18), Banking (April 24), Peer Review and Professional Conduct.

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

NEW WEBSITE

continued from page 1

New Features

- Our new online **CPE Catalog** has more advanced search features and now includes online courses from the best providers in the country at a reduced cost for our members. All registrations will be included on your annual CPE transcript from us.
- The new **Member Dashboard** provides an overview of your profile information, CPE credits earned, dues payment status, and committee service.
- Our new **My CPE** tool allows members to track existing and upcoming CPE registrations with ease as well as download

course certificates, add courses not taken through the MSCPA, and print a course transcript.

- The **Pay Dues** page allows members to confirm their dues payment status and pay dues for the fiscal year.
- All Member Discounts are listed on the **Member Benefits** page for quick reference.
- The new **Committees** page includes a current roster of committee chairs and members.
- The new **Chapters** page includes chapter officers and upcoming chapter events.

Thanks again for your continued support and patience as we move through this transition.

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Peer Review Changes for Firms Set to Launch May 1, 2017

The AICPA plans to launch a new application to manage peer reviews on May 1, 2017. The MSCPA will continue to administer the peer review program, but all documentation will now be handled electronically through the AICPA's PRIMA application for all member and non-AICPA member firms.

What is PRIMA?

Peer Review Integrated Management Application (PRIMA) is the new web-based application that will replace PRISM, which is the existing platform used by peer review administrators, reviewers, and firms to manage the peer review process. PRIMA is designed to be intuitive and responsive to our changing environment and will have a robust knowledge base available to all users.

For All Firms to Follow After May 1, 2017:

After May 1, 2017, firms will complete all peer review information directly in PRIMA. This includes:

- Updating your firm's enrollment (including your firm's Managing Partner and Peer Review Contact as well as indicating the levels of service performed by your firm)
- Scheduling your firm's peer review
- Responding to Matters for Further Consideration (MFCs), if applicable, during your review
- Responding to Findings for Further Consideration (FFCs), if applicable, during your review
- Acknowledging your peer review acceptance letter
- Submitting evidence for corrective actions
- Facilitated State Board Access (FSBA)

Reviewer and Firm Training:

Free training after PRIMA go-live is scheduled for Tuesday, May 16, 2017 at 1:00 CST. Registration is available at aicpa.org/PRIMA. Links to the archived March 20 Reviewer Training and the March 22 Firm

Training are also available on the website.

Communication:

All peer review correspondence under PRIMA will be handled electronically. PRIMA questions should be directed to AICPA support at 919-402-4502.

BOARD OF GOVERNORS MEETING

MAY 11, 2017

3:30 P.M.

MSCPA TRAINING CENTER
RIDGELAND



BUSINESS PLANNING

- Corporate Financial Planning
- Mergers
- Sales of Businesses
- Acquisitions

TAX SUPPORT

- Civil / Criminal Tax Litigation
- Civil / Criminal Tax Controversy
- Individual Tax Planning
- Business Tax Planning

ESTATE PLANNING

- Wills
- Trusts
- Personal Financial Planning
- Estate Litigation



Lacey L. Bailey,
J.D., LL.M.

James Williams "Will"
Janoush, J.D., LL.M.

Harris H. "Trip" Barnes III,
J.D., LL.M.

S. Gray Edmondson,
J.D., LL.M.

Brandon C. Dixon, J.D., LL.M.

Krista S. Andy, J.D., LL.M.

Of Counsel: Ronald A. Worley, J.D., LL.M.

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2017 MSCPA Convention Agenda Announced



The 2017 MSCPA Annual Convention is June 22-25, 2017 at Sandestin Golf and Beach Resort in Destin, Florida marking the 97th anniversary for the MSCPA. MSCPA Chairman Charles Prince extends an invitation to all MSCPA members and friends of the Society to attend.

Activities begin on Thursday, June 22 as exhibitors set up in the Baytowne Conference Center. Two four-hour CPE programs are offered with Harris H. "Trip" Barnes III, J.D., LL.M. presenting a four-hour program on Business Succession Planning; Captive Insurance Companies; and Financial and Taxation Update: The First Six Months of POTUS Thursday morning. Thursday afternoon Bill Felder, CPA, CISA will present a four-hour Accounting and Auditing Update. Complete details on the two courses are posted on the MSCPA website. Convention registration begins Thursday at 1 p.m. in the Azalea Foyer 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. Our "Rockin' the 50s" theme will continue our countdown to our century celebration in 2020.

Friday Morning Speakers



Kimberly N. Ellison-Taylor, CPA, CGMA speaks at 9 a.m. and brings a "Professional Issues Update." Ellison-Taylor is Chairman of the AICPA Board of Directors, past Chair of the Maryland Association of CPAs, and is

Global Accounting Strategy Director for the Financial and Professional Services Industries for Oracle America.



Kent Radar, known as the "World's Cleanest Comedian and Speaker," speaks at 10:30 a.m. on "From Money to Funny: Four Business Principles Learned on My Journey from

Accounting to Comedy." *(A special invitation has been extended to spouses to hear Radar's presentation.)* Kent Radar helps people and associations learn and experience how laughter matters in reducing stress and building quality organizations. Kent survived five years in public accounting and twelve years as C.F.O. and C.E.O. of hospitals before becoming a professional speaker in 1997.

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 Destiny for an afternoon of fishing. The tennis tournament is also back on the agenda this year! A box lunch will be provided after the last speaker concludes.

Free Evening Friday Night

This year's convention schedule again 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 MSCPA Chairman Charles Prince presiding. Officers for the 2017-2018 fiscal year will be elected, and reports from the Secretary, Treasurer, President, Insurance Trust Chair, AICPA Council Representative, Young CPA Network, Legislation Chair, State Auditor, 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 Rising Star Award.

Following the morning refreshment break, members will gather in the main meeting room at 11:20 a.m. for exhibitor prize drawings.

Saturday Afternoon

Volleyball Tournament and Beach Party 1:30 p.m. – 4:00 p.m. (between the Beachside Two and Luau condos).

Saturday Evening

Members return to the Conference Center on Saturday evening for the reception at 6:45 p.m. and will be seated for dinner at 7:30 p.m. MSCPA Chairman Charles Prince will introduce newly elected officers and the traditional exchange of the gavel will be made as MSCPA Chairman-Elect Bill Taylor nears the beginning of his term. The Bailey Trophy will be presented to the winning volleyball team.

Entertainment will feature **Crescent**



Circus, a husband-wife duo who fuse their expertise in magic and circus arts respectively to deliver a one-of-a-kind experience on stage. Beginning in New Orleans, The Crescent City,

Nathan Kepner and Morgan Tsu-Raun have entertained corporate and collegiate audiences across the country and even overseas. Their original stage work has earned them six international titles, performances at London's prestigious Magic Circle Theater and an appearance on *The Tonight Show*.

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

Prayer Breakfast Closes Convention Sunday morning

The traditional Sunday morning Prayer Breakfast will close the 2017 meeting.

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CONVENTION

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Special for Spouses

On Friday morning at 9 a.m., the Executive Chef at Sandestin will present a cooking demonstration. Breakfast is included. The cooking program will conclude in time for spouses to hear Kent Radar's presentation in the main meeting room.

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

Children Activities for Ages 4-12

Thursday, June 22, 2017 (6:30 PM – 9:00 PM) Arts, crafts, games and snacks

Friday, June 23, 2017 (8:30 AM – Noon) Lawn party with bubble soccer, jumbo jenga, giant connect four, and ladder ball on the Grand Lawn and pool party and snacks at the Grand Pool (activities will be moved to the Camellia Room if weather is an issue)

Saturday, June 24, 2017 (6:15 PM – 9:30 PM) Games, arts, crafts, carnival with Captain Davy Pirate Magic Show, balloon animals and face painting. Dinner included.

Babysitting Service

In-room babysitting service is available 24/7 through Precious Ones Nanny Care and can be arranged by calling 850-376-7704. Staff is CPR certified, bonded and insured. Members are responsible for payment. Visit www.preciousonesnannycare.com for additional information.

Calling All Volleyball Teams For Convention

Who will take home the Bailey Trophy this year? We are looking for teams to participate in our 3rd annual volleyball tournament June 24 at Convention. Gather up your co-workers, colleagues, family or friends and email Karen Moody, kmoody@mscpa.org, to sign up your team of 6 players or more. We do not need individual/player names at this time, just team names!

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

NEW THIS YEAR:

Corn hole has been added to the beach party!



2015 Champions – Team Horne



2016 Champions – Team MSCPA

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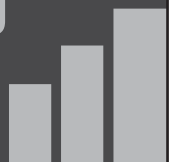
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MISSISSIPPI SOCIETY OF CPAS 2017 ANNUAL MEETING

Wednesday, June 21-Sunday, June 25, 2017

GROUP CODE: 23A0FA

Name _____ Number in Party: Adults ____ Children ____
 Company Name _____ Business Phone _____
 Address _____ E-Mail _____
 City _____ State _____ Zip _____
 Sharing With _____
 Arrival Day/Date _____ Departure Day/Date _____

Your cut-off date for reservations is **May 18, 2017**, after which rooms will be sold on a space-available basis.

ACCOMMODATIONS AND RATES

A deposit of one night's room rate is required to secure rooms. All room rates quoted **DO NOT** include 12% fees and 11% taxes.

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

Any other type of accommodation besides what is in your block will vary in cost depending on location.

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

<u>Accommodation</u>	<u>Rate</u>	<u>Accommodation</u>	<u>Rate</u>
Beachside Studio*	\$ 299.00	Lakeside 2 Bdrm	\$ 289.00
Beachside 1 Bdrm*	\$ 354.00	Lakeside 3 Bdrm	\$ 379.00
Beachside 2 Bdrm*	\$ 490.00	Lakeside 4 Bdrm	\$ 445.00
Beachside 3 Bdrm*	\$ 614.00	Bayside at Sandestin-Guest Room	\$ 165.00
Westwinds 1 Bdrm*	\$ 364.00	Bayside at Sandestin-1 Bdrm Suite	\$ 207.00
Westwinds 2 Bdrm*	\$ 515.00	Bayside 2 Bdrm	\$ 259.00
Westwinds 3 Bdrm*	\$ 629.00	Village - Studio	\$ 205.00
Southside 2 Bdrm	\$ 322.00	Village 1 Bdrm	\$ 227.00
Southside 3 Bdrm	\$ 420.00	Village 2 Bdrm	\$ 339.00
Southside 3 Bdrm Loft	\$ 454.00	Village 3 Bdrm	\$ 430.00
Beachwalk 2 Bdrm	\$ 289.00	Grand Complex Studio	\$ 217.00
Luau 1 Bdrm*	\$ 213.00	Grand Complex 1 Bdrm	\$ 239.00
Luau 2 Bdrm*	\$ 309.00	Grand Complex 2 Bdrm	\$ 349.00
		Grand Complex 3 Bdrm	\$ 455.00

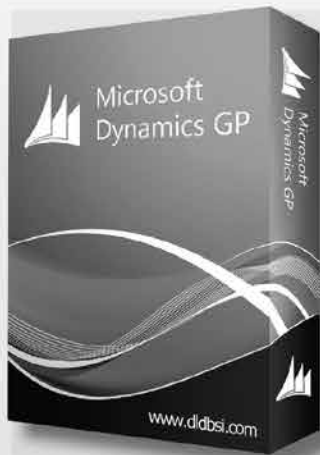
*A 5-night minimum is required on Beachfront accommodations; and a 4-night minimum is required on Luau units.

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.

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MSCPA 2017 ANNUAL CONVENTION REGISTRATION

June 22-25, 2017 | Sandestin Golf and Beach Resort | Destin, FL

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

PRIMARY CONVENTION REGISTRATION:

Name _____ Member ID # _____

Company _____

Address _____

Phone _____ Email _____

*MEMBER FIRST TIME ATTENDEE General Registration \$150 Includes welcome reception, three breakfasts, two speaker presentations, Friday box lunch, Saturday beach party/volleyball tournament, reception, banquet and special entertainment.	
General Registration \$285 Includes welcome reception, three breakfasts, two speaker presentations (approved for 2 CPE credits), Friday box lunch, Saturday beach party/volleyball tournament, reception, banquet and special entertainment.	
Spouse/Guest Registration \$150 Includes welcome reception, three breakfasts, Friday morning cooking demonstration, Friday box lunch, Saturday bingo with prizes, beach party/volleyball tournament, reception, banquet and special entertainment.	
Spouse/Guest Name _____	SUBTOTAL
	\$ _____
<hr/>	
CPE SEMINARS Lunch included	
Thursday, 8:30 AM – Noon CPE Credit: 4 General \$150 Business Succession Planning; Captive Insurance Companies; Financial and Taxation Update: The First Six Months of POTUS , Harris H. "Trip" Barnes III, J.D., LL.M.	SUBTOTAL
Thursday, 1:00 PM – 4:30 PM CPE Credit: 4 A&A \$150 Accounting and Auditing Update , Bill Felder, CPA, CISA	\$ _____
<hr/>	
ACTIVITIES Spouses, guests and children welcomed! Cash prizes will be awarded!	
Golf Tournament Friday, June 23, 2017 \$80 per person Includes green fee, cart fee, tournament registration and refreshments. Reservation must be received by June 19, 2017 to guarantee availability. Tee time is offered on a space available basis after cutoff date. Player(s) and Handicap(s): _____	
Deep Sea Fishing Friday, June 23, 2017 \$50 per person Includes fishing license, bait, tackle, fish cleaning and refreshments on board the Destiny. Advance registration recommended. This trip usually sells out! Participant(s): _____	
Tennis Tournament Friday, June 23, 2017 \$40 per person Includes court time, tennis balls, and refreshments. Matches will be assigned by organizer. Player(s) and USTA Rating(s) if applicable: _____	
CHILDREN'S EVENTS (ages 4-12 years old) FREE Thursday Evening: arts, crafts, games and snacks. _____ Number of children attending Friday Morning: lawn and pool party with bubble soccer, jumbo jenga, giant connect four, ladder ball, and snacks. _____ Number of children attending Saturday Evening: carnival with games, arts, crafts, magic show, balloon animals, face painting, and dinner. _____ Number of children attending	SUBTOTAL
	\$ _____
<hr/>	
TOTAL AMOUNT DUE \$ _____	

TO REGISTER

- **ONLINE** at www.ms-cpa.org/education/annual-convention
- **FAX** a completed registration form with credit card information to MSCPA at 601-856-8255.
- **CALL** Noma Gillis at 601-856-4244 or 800-772-1099.
- **MAIL** your completed registration form with credit card information or a check made payable to: Mississippi Society of CPAs, 306 Southampton Row, Ridgeland, MS 39157

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Cancellations thru June 20, 2017 accepted without penalty. Cancellations/no-shows on the date of the event forfeit the entire registration fee. No refunds or transfer of fees will be made after the date of the event.

Defending the Certified Public Accountant in a Malpractice Lawsuit

By Jim Koerber, MSCPA Member

While there is an abundance of articles written about steps to avoid malpractice lawsuits for a Certified Public Accountant (CPA), resources related to defending the CPA in a malpractice claim appear to be limited.

CPAs know to discontinue providing services to a client when issues such as unpaid fees or client integrity occur. However, even if a CPA complies with the professional requirements of the CPA profession when preparing an income tax return or conducting an audit, the CPA may still find that a client, other entity, or individual files a lawsuit because of an event that they allege is related to the services provided by the CPA. The plaintiff usually alleges some type of negligence on the part of the CPA.

After the lawsuit is filed, the process begins to analyze the alleged economic damages claimed by the plaintiff. The attorney defending the CPA will have a background in accounting malpractice claims and knowledge of related Federal and state case law. The CPA's attorney will hire experts to assist in this analysis. While there can be multiple experts, the primary experts for a CPA malpractice lawsuit are usually a CPA who is knowledgeable in the standard of care and a CPA who is knowledgeable in the area of economic damages. For example, if the lawsuit involves the audit of a manufacturing company, the attorney should retain a CPA who has extensive knowledge in auditing manufacturing companies. While hiring a CPA who is knowledgeable in auditing in general might appear prudent, it can be a weakness if the CPA has a limited area of expertise for auditing a specific industry.

A CPA knowledgeable in economic damages is also vital to defending the claim. Just as the standard of care CPA should have extensive knowledge in the auditing of a specific industry, the economic damages CPA should be knowledgeable in issues related to quantifying economic damages. Often in a CPA malpractice lawsuit, the plaintiff's attorney will hire a CPA or economist to opine to the economic damages, which might relate to lost profits or loss of business

value. The CPA's expert will review the damage calculation of the plaintiff's expert to determine if the damages comply with peer-reviewed publications. If there are shortcomings to the plaintiff's economic damages, the defendant's economic damages CPA should be able to identify those issues.

For example, if the economic damages relate to a lost profits claim against the CPA, the following are areas that must be established by the plaintiff:

1. **Proximate Cause** – Is there evidence to make a connection between the services performed by the CPA and the alleged damages?
2. **Foreseeability** – Is there evidence that the alleged damages were foreseeable when the CPA was engaged to perform the services?
3. **Reasonable Certainty** – Is there evidence to calculate the plaintiff's economic damages with reasonable certainty and not speculation?

In reviewing the alleged economic damages presented by the plaintiff's expert, the economic damages CPA may be able to discover flaws in the report prepared by the plaintiff's expert. Some of these might include:

1. **Failure to deduct avoided costs**, which are those expenses that would have been incurred to generate the lost revenues. Since case law requires net profits to be determined in lost profit cases, if the plaintiff's expert fails to deduct avoided costs, then the damage calculation may be deemed flawed. Avoided costs are generally variable expenses, but, under certain circumstances, may include fixed expenses.
2. **Failure to comply with one of the generally-accepted methods for calculating lost profits**, which may include the "before and after" method, the "yardstick" method, and other methods. In this area, some experts mistakenly state the damages are under the "but for" method. However, "but for" is the concept for lost profits and not a method. Even if the plaintiff's expert complies with these methods, the expert's opinion regarding damages may still be flawed because of the underlying data relied

upon and other issues.

3. **Failure to consider mitigation**, which requires the plaintiff to take realistic steps to prevent future losses and/or to reduce the lost profits. If the plaintiff does not attempt to mitigate, the defendant CPA may have an affirmative defense.
4. **Failure to consider relevant factors**, which could include changes in competition, government regulations, the economy, the industry, changes in operations, and the loss of key personnel and how these other factors affected the plaintiff. These relevant factors must be considered and addressed by the plaintiff's expert.
5. **Failure to calculate the damages with reasonable certainty**, which has been described in *How Judges Think* (2008) by the Honorable Richard A. Posner as, "Does the court think that, given all of the circumstances, this plaintiff has presented sufficient evidence to make it fair to award it the damages in question?" While an exact damage calculation is not required, the damages cannot be based on speculation.
6. **Failure to connect the damages to the services provided by the CPA**, which is the "proximate cause" requirement. As the U.S. Fifth Circuit Court of Appeals found in *Gallagher v Babcock* (706 F.3d 284, 5th Cir. 2012), "The comparison of profits before and during a period of alleged illegal activity, without proof, does not prove causation." Therefore, the report of the plaintiff's expert should be based on economic reality.

While the experience of a malpractice lawsuit against a CPA or a CPA firm is something all CPAs wish to avoid, it can happen. The plaintiff will attack the CPA defendant in an attempt to establish alleged damages. However, with professional advice and guidance from qualified and knowledgeable attorneys and experts, these alleged damages can be examined closely in order to possibly reduce or eliminate them.

Jim Koerber, CPA/ABV/CFF, CVA is a shareholder with The Koerber Company, P.A. in Hattiesburg. Jim and those in his firm provide business valuation and litigation services to attorneys, CPAs, and their clients.

Accounting & Auditing Conference (AAC)

Wednesday, May 10, 2017

MSCPA Training Center, Ridgeland

Member Price: \$210 | CPE: 8 A&A

This event will provide the crucial guidance you need to stay in compliance with the many A&A rules affecting your practice, business or clients.

Agenda:

- | | |
|-------------|---|
| 8:00-8:30 | Registration |
| 8:30-10:00 | AICPA Professional Standards: An Overview of Changes for 2017 and Beyond - <i>Michael Brand</i> |
| 10:00-10:15 | Break |
| 10:15-12:00 | AICPA Professional Standards - Continued |
| 12:00-12:45 | Lunch |
| 12:45-2:15 | Online Filing with the Secretary of State - <i>Tom Riley</i> |
| 2:30-4:25 | Cyber Security - <i>Kendall Blaylock & Mike Skinner</i> |
| 4:25-4:30 | Prize Giveaway and Closing Remarks |

Log in at www.ms-cpa.org to register online, or complete a registration form and register via mail, fax, or phone.

CHAPTER EVENTS

Northwest Chapter



The MSCPA Northwest Chapter held their quarterly meeting February 9 in Hernando. The 2-hour CPE event was followed by a networking social sponsored by Community Foundation of Northwest Mississippi.



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- Wrongful Death
- Expert Witness Testimony
- Economic Damages
- Data Analysis
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Information Technology

- E-Discovery
- Digital Forensics
- Intellectual Property
- Family Law
- Employment Law
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Deena C. Keasler,
CPA/ABV, CVA



Joe C. Travis,
CPA, CFF, CRFAC



Annette P. Herrin,
CPA/ABV, CVA, CFE, CFF

Young CPA Conference (YCPAC)

Friday, April 28, 2017

MSCPA Training Center, Ridgeland

Member Price: \$100 | CPE: 8 General

This MSCPA Young CPA Network event is for young and aspiring CPAs looking to build success skills to get ahead.

Agenda:

- | | |
|-------------|---|
| 8:00-8:30 | Registration and Breakfast Social |
| 8:30-10:10 | Excel Tools for Enhanced Data Analytics -
<i>Mark Lehman</i> |
| 10:10-10:20 | Break |
| 10:20-12:00 | Cyber Security Series - <i>John Higgins</i> |
| 12:00-1:00 | Announcement of Rising Star Recipient
Lunch/MSCPA Young CPA Network Annual
Business Meeting |
| 1:00-2:40 | Fighting White Collar Crime - <i>Daniel Champney</i> |
| 2:40-2:50 | Break |
| 2:50-4:30 | Stress Management and Team Building -
<i>Kip Bowen</i> |
| 4:30 | Door Prize and Adjournment |

Log in at www.ms-cpa.org to register online, or complete a registration form and register via mail, fax, or phone.

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**thursday, april 27, 2017
6:00 PM – 9:00 PM**

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Hot Topics in Industry: A Program for Management Development (PMD)

Wednesday, May 17, 2017 –

Thursday, May 18, 2017

MSCPA Training Center, Ridgeland |

Member Price: \$300 | CPE: 16 A&A

The Program for Management Development is geared toward chief financial officers, controllers and other executives in industry, managers, and partners in public accounting.

AGENDA:

Wednesday, May 17, 2017

8:00 – 8:30 Breakfast and Registration

8:30 – 12:00 The Crisis at Tyco – A Director's Perspective, *Steve Sanders*

12:00 – 1:00 Lunch (provided)

1:00 – 2:40 Finding Cover When it Counts: Responding to Insurers That Deny Coverage, *Alex Purvis*; Adding Value at Each Stage of the M&A Deal, *Wendy Mullins*

2:40 – 2:50 Break

2:50 – 4:30 Alternative Dispute Resolution: What It Is, Why You Want It, and How to Get It, *Anna Morris and Jon Still*

Thursday, May 18, 2017

8:00 – 8:30 Breakfast and Registration

8:30 – 12:00 Airlines and Antitrust: Scrutinizing the American Airlines – US Airways Merger, *Guy McClain*

12:00 – 1:00 Lunch (provided)

1:00 – 2:40 What Could Go Wrong – Understanding Internal Controls and the Importance of Professional Skepticism, *Wilkins Crawford*

2:40 – 2:50 Break

2:50 – 4:30 The 5 Languages of Appreciation in the Workplace, *Chris Webb*

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2017 CONFERENCES & SEMINARS BY LOCATION

GULFPORT

Marriott Courtyard
1600 E Beach Blvd
Gulfport, MS 39501
228-864-4310

Nexus Update: Latest Developments in State Income, Franchise, and Sales Taxes

Date: 6/19/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Dennis Riley
Acronym: NXUP-2 / Vendor: AICPA
Members: \$270 Non-Members: \$340

Governmental and Not-for-Profit Annual Update

Date: 6/19/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Bruce Shepard
Acronym: GNAU-1 / Vendor: AICPA
Members: \$270 Non-Members: 340

Slashing Taxes for Your Small Business Clients: Corporations, Partnerships, & LLCs

Date: 6/20/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Dennis Riley
Acronym: STSB-2 / Vendor: AICPA
Members: \$270 Non-Members: 340

Leases: Mastering the New FASB Requirements

Date: 6/20/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Bruce Shepard
Acronym: LEAS-1 / Vendor: AICPA
Members: \$270 Non-Members: 340

Financial Statement Analysis: Basis for Management Advice

Date: 6/21/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Cecil M. (Bill) Felder
Acronym: FSABM / Vendor: AICPA
Members: \$270 Non-Members: 340

Identity Theft: Preventing, Detecting, and Investigating Identity Theft

Date: 6/21/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Bruce Shepard
Acronym: IDENT-2 / Vendor: AICPA
Members: \$270 Non-Members: 340

Ethics, Rules, and Regulations

Date: 11/2/2017
Course Hours: 8:30-12 / CPE: 4
Instructor: William F. (Bill) Taylor, CPA
Acronym: ERR-5 / Vendor: SELF
Members: \$150 Non-Members: \$190

Select Estate and Life Planning Issues for the Middle-Income Client

Date: 11/2/2017
Course Hours: 1:00-4:30 / CPE: 4
Instructor: William F. (Bill) Taylor, CPA
Acronym: PMI4 / Vendor: SURGENT
Members: \$150 Non-Members: \$190

U.S. GAAP: Review for Business & Industry

Date: 11/2/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Christopher Rouse
Acronym: FASBI-1 / Vendor: AICPA
Members: \$270 Non-Members: \$340

Best Practices for Payroll Taxes and 1099 Issues

Date: 11/3/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: William F. (Bill) Taylor, CPA
Acronym: GPT / Vendor: AICPA
Members: \$270 Non-Members: \$340

Annual Update and Practice Issues for Preparation, Compilation, and Review Engagements

Date: 11/3/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Christopher Rouse
Acronym: CORU / Vendor: AICPA
Members: \$270 Non-Members: \$340

HATTIESBURG

Lake Terrace Convention Center
1 Convention Center Plaza
Hattiesburg, MS 39401
601-268-3220

Form 990: Mastering Its Unique Characteristics

Date: 5/23/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Brian Yacker
Acronym: EO-F990 / Vendor: AICPA
Members: \$270 Non-Members: 340

Fraud Update: Detecting and Preventing the Top Ten Fraud Schemes

Date: 5/23/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Thomas Newell
Acronym: TTFS / Vendor: AICPA
Members: \$270 Non-Members: 340

Internal Control Best Practices for Small- and Medium-Sized Entities

Date: 5/24/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Thomas Newell
Acronym: ICSM / Vendor: AICPA
Members: \$270 Non-Members: 340

Not-for-Profit Financial Reporting: Mastering the Unique Requirements

Date: 5/24/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Brian Yacker
Acronym: NFPF-1 / Vendor: AICPA
Members: \$270 Non-Members: 340

Reviewing Pass-Through Tax Returns: What Are You Missing?

Date: 5/25/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: William Murphy
Acronym: RPTR-1 / Vendor: AICPA
Members: \$270 Non-Members: 340

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

Date: 5/25/2017
Course Hours: 8:30-12 / CPE: 4
Instructor: Thomas Newell
Acronym: CL4INRR-1 / Vendor: AICPA
Members: \$150 Non-Members: 190

Fraud in Small-to Medium-Sized Entities

Date: 5/25/2017
 Course Hours: 1:00-4:30 / CPE: 4
 Instructor: Thomas Newell
 Acronym: CL4FSME / Vendor: AICPA
 Members: \$150 Non-Members: 190

Yellow Book: Government Auditing Standards

Date: 11/28/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Cecil M. (Bill) Felder
 Acronym: EO-YB-2 / Vendor: AICPA
 Members: \$270 Non-Members: 340

Slashing Taxes for Your Small Business Clients: Corporations, Partnerships, & LLCs

Date: 11/28/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Jonathan Ingber
 Acronym: STSB-3 / Vendor: AICPA
 Members: \$270 Non-Members: 340

Ethics, Rules, and Regulations

Date: 11/29/2017
 Course Hours: 8:30-12 / CPE: 4
 Instructor: Billy Morehead
 Acronym: ERR-6 / Vendor: SELF
 Members: \$150 Non-Members: 190

Uniform Grant Guidance & Single Audit Update

Date: 11/29/2017
 Course Hours: 1:00-4:30 / CPE: 4
 Instructor: Billy Morehead
 Acronym: OMB / Vendor: SELF
 Members: \$150 Non-Members: 190

AICPA's Annual Federal Tax Update

Date: 11/29/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Jan Lewis
 Acronym: PTU- 2 / Vendor: AICPA
 Members: \$270 Non-Members: 340

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Mississippi Technology Conference

Date: 5/22/2017 - 5/23/2017
 Course Hours: 8:00-4:30 / CPE: 16
 Instructor: Panel
 Acronym: MTC / Vendor: K2 Enterprises
 Members: \$455 Non-Members: \$595

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 1001 E County Line Rd
 Jackson, MS 39211
 601-957-2800

Governmental Accounting and Auditing Conference

Date: 8/17/2017 - 8/18/2017
 Course Hours: 8:30-4:30 / CPE: 16
 Instructor: Panel
 Acronym: GAAC / Vendor: SELF
 Members: \$280 Non-Members: \$380

Banking and Finance Conference

Date: 8/22/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Panel
 Acronym: BANK / Vendor: SELF
 Members: \$200 Non-Members: \$275

Mississippi Tax Institute

Date: 12/7/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Panel
 Acronym: MTI / Vendor: SELF
 Members: \$180 Non-Members: \$180

Not-for-Profit Conference

Date: 11/16/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Panel
 Acronym: NPC / Vendor: SELF
 Members: \$100 Non-Members: \$100

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Holmes Community College
412 W Ridgeland Ave
Ridgeland, MS 39157
601-856-5400

Nexus Update: Latest Developments in State Income, Franchise, and Sales Taxes

Date: 5/31/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Michael Frost
Acronym: NXUP-1 / Vendor: AICPA
Members: \$270 Non-Members: \$340

Basis/Distributions for Pass-Through Entities: Simplifying the Complexities

Date: 6/1/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Michael Frost
Acronym: BADI / Vendor: AICPA
Members: \$270 Non-Members: \$340

Valuing a Business: What is this Company Worth?

Date: 6/26/2017
Course Hours: 8:30-12 / CPE: 4
Instructor: Don Minges
Acronym: VAB / Vendor: Executive Education
Members: \$150 Non-Members: \$190

How Good Companies Become Great: Secrets to Success

Date: 6/26/2017
Course Hours: 1:00-4:30 / CPE: 4
Instructor: Don Minges
Acronym: GTG / Vendor: Executive Education
Members: \$150 Non-Members: \$190

Predicting the Future: Create the Best Projections You Can

Date: 6/27/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Don Minges
Acronym: PTF / Vendor: Executive Education
Members: \$270 Non-Members: \$340

Governmental and Not-for-Profit Annual Update

Date: 6/28/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Melisa Galasso
Acronym: GNAU-2 / Vendor: AICPA
Members: \$270 Non-Members: \$340

Technology for CPAs: Don't Get Left Behind

Date: 6/29/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Brian Tankersley
Acronym: TEC / Vendor: K2 Enterprises
Members: \$275 Non-Members: \$345

K2's Business Intelligence, Featuring Microsoft's Power BI Tools

Date: 6/30/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Brian Tankersley
Acronym: BIN / Vendor: K2 Enterprises
Members: \$275 Non-Members: \$345

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MSCPA Training Center
306 Southampton Row
Ridgeland, MS 39157
601-856-4244

Ethics, Rules, and Regulations

Date: 1/13/2017
Course Hours: 8:30-12 / CPE: 4
Instructor: William F. (Bill) Taylor, CPA
Acronym: ERR-1 / Vendor: SELF
Members: \$150 Non-Members: \$190

From Hiring to Firing & Everything in Between: Legal, Tax, & Health Care Issues

Date: 1/27/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: William F. (Bill) Taylor, CPA
Acronym: HTOF / Vendor: SURGENT
Members: \$270 Non-Members: \$340

CFO Series: Corporate Finance Skills

Date: 2/16/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Don Minges, CPA
Acronym: CFS / Vendor: Executive Education
Members: \$270 Non-Members: \$340

Corporate Finance Check-up: Renovate Your Analytical Toolbox

Date: 2/17/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Don Minges, CPA
Acronym: CFC / Vendor: Executive Education
Members: \$270 Non-Members: \$340

CFO Series: Essential Skills

Date: 4/21/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: John Daly, CPA
Acronym: ESC / Vendor: Executive Education
Members: \$270 Non-Members: \$340

Young CPA Conference

Date: 4/28/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Panel
Acronym: YCPAC / Vendor: SELF
Members: \$100 Non-Members: \$100

Accounting and Auditing Conference

Date: 5/10/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Mike Brand, CPA
Acronym: AAC / Vendor: SELF
Members: \$210 Non-Members: \$285

Business Writing Skills for CPAs

Date: 5/15/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Mark Gorman, CPA
Acronym: BUSW / Vendor: SURGENT
Members: \$270 Non-Members: \$340

Become a Public Speaking Pro Today! Interactive Skills Building Workshop

Date: 5/16/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Mark Gorman, CPA
Acronym: PSTW / Vendor: SURGENT
Members: \$270 Non-Members: \$340

Hot Topics in Industry: A Program for Management Development

Date: 5/17/2017 - 5/18/2017
Course Hours: 8:30-4:30 / CPE: 16
Instructor: Panel
Acronym: PMD / Vendor: SELF
Members: \$300 Non-Members: \$375

Mississippi Sales and Use Tax

Date: 5/19/2017
Course Hours: 8:30-12 / CPE: 4
Instructor: Greg Duke
Acronym: MSUT / Vendor: SELF
Members: \$150 Non-Members: \$190

Ethics, Rules, and Regulations

Date: 5/19/2017
Course Hours: 1:00-4:30 / CPE: 4
Instructor: Billy Morehead
Acronym: ERR-2 / Vendor: SELF
Members: \$150 Non-Members: \$190

Audit Work papers: Documenting and Reviewing Field Work

Date: 5/24/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Glenn Helms
 Acronym: AUDW / Vendor: AICPA
 Members: \$270 Non-Members: \$340

Internal Controls and Risk Assessment: Key Factors in a Successful Audit

Date: 5/25/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Glenn Helms
 Acronym: ICRA / Vendor: AICPA
 Members: \$270 Non-Members: \$340

Purchasing, Inventory, and Cash Disbursements: Common Frauds and Internal Controls

Date: 5/26/2017
 Course Hours: 8:30-12 / CPE: 4
 Instructor: Glenn Helms
 Acronym: CL4PCD / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Fraud and Cash Receipts: Common Frauds and Internal Controls

Date: 5/26/2017
 Course Hours: 1:00-4:30 / CPE: 4
 Instructor: Glenn Helms
 Acronym: CL4RCR / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Audits of 401(k) Plans

Date: 5/30/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: William F. (Bill) Taylor, CPA
 Acronym: AFKP / Vendor: AICPA
 Members: \$270 Non-Members: \$340

Tax Considerations and Consequences for Closely Held Businesses

Date: 5/31/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: William F. (Bill) Taylor, CPA
 Acronym: CHTX / Vendor: AICPA
 Members: \$270 Non-Members: \$340

AICPA's Annual Update: Top 12 Governmental and Not-for-Profit Accounting and Auditing Issues Facing CPAs

Date: 6/1/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: John Georger, Jr
 Acronym: TGNP / Vendor: AICPA
 Members: \$270 Non-Members: \$340

Advanced Topics in a Single Audit

Date: 6/2/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: John Georger, Jr
 Acronym: ADUG / Vendor: AICPA
 Members: \$270 Non-Members: \$340

Fraud Risk in Governmental and Not-for-Profit Organizations

Date: 6/5/2017
 Course Hours: 8:30-12 / CPE: 4
 Instructor: Dan Bradley
 Acronym: CL4FRGNP / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Governmental Pensions: Prepare for a Changing Landscape

Date: 6/5/2017
 Course Hours: 1:00-4:30 / CPE: 4
 Instructor: Dan Bradley
 Acronym: CL4PENS / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Data Breaches & Other Cyber Frauds: A 21st Century Risk to Your Organization

Date: 6/6/2017
 Course Hours: 8:30-12 / CPE: 4
 Instructor: Dan Bradley
 Acronym: CL4DATA / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Fraud: Recent Findings, Red Flags and Corruption Schemes

Date: 6/6/2017
 Course Hours: 1:00-4:30 / CPE: 4
 Instructor: Dan Bradley
 Acronym: CL4FRAU / Vendor: AICPA
 Members: \$150 Non-Members: \$190

The Changing Role of the Controller: Advancing from Tactical to Strategic

Date: 6/7/2017
 Course Hours: 8:30-12 / CPE: 4
 Instructor: Matthew Ryan
 Acronym: CL4COBP / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Analyzing a Company's Financial Statement

Date: 6/7/2017
 Course Hours: 1:00-4:30 / CPE: 4
 Instructor: Matthew Ryan
 Acronym: CL4FSABM / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Reviewing Individual Tax Returns: What Are You Missing?

Date: 6/8/2017
 Course Hours: 8:30-12 / CPE: 4
 Instructor: William F. (Bill) Taylor, CPA
 Acronym: CL4ITRM / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Social Security and Medicare: Maximizing Retirement Benefits

Date: 6/8/2017
 Course Hours: 1:00-4:30 / CPE: 4
 Instructor: William F. (Bill) Taylor, CPA
 Acronym: CL4SSM / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Tax Planning Strategies for Small Businesses: Corporations, Partnerships, & LLCs

Date: 6/9/2017
 Course Hours: 8:30-12 / CPE: 4
 Instructor: William F. (Bill) Taylor, CPA
 Acronym: CL4STSB / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Protecting Your Client from Tax Return Identity Theft

Date: 6/9/2017
 Course Hours: 1:00-4:30 / CPE: 4
 Instructor: William F. (Bill) Taylor, CPA
 Acronym: CL4TRF / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Governmental Accounting and Reporting Advisor

Date: 6/12/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Michael Morgan
 Acronym: GARU / Vendor: AICPA
 Members: \$270 Non-Members: \$340

Not-for-Profit Financial Reporting: Mastering the Unique Requirements

Date: 6/13/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Michael Morgan
 Acronym: NFPF-2 / Vendor: AICPA
 Members: \$270 Non-Members: \$340

Advanced Controller and CFO Skills

Date: 6/14/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: David Arnott
 Acronym: ACCS / Vendor: AICPA
 Members: \$270 Non-Members: \$340

Ethical Leadership for Mississippi CPAs: Power, Influence, Integrity and Trust

Date: 6/15/2017
 Course Hours: 8:30-12 / CPE: 4
 Instructor: Richard Karwic
 Acronym: EL / Vendor: Executive Education
 Members: \$150 Non-Members: \$190

Better Performance Plans: Get Stronger Results from Your Compensation Plan

Date: 6/15/2017
 Course Hours: 1:00-4:30 / CPE: 4
 Instructor: Richard Karwic
 Acronym: BPP / Vendor: Executive Education
 Members: \$150 Non-Members: \$190

CFO Series: Managing Risk

Date: 6/16/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Richard Karwic
 Acronym: CFO Series: Managing Risk / Vendor: Executive Education
 Members: \$270 Non-Members: \$340

Reviewing Pass-Through Tax Returns: What Are You Missing?

Date: 6/19/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Michael Frost
Acronym: RPTR-2 / Vendor: AICPA
Members: \$270 Non-Members: \$340

Understanding and Creating an Internal Control Structure

Date: 6/20/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Karl Egnatoff
Acronym: UCIC / Vendor: Phoenix Beach
Members: \$270 Non-Members: \$340

Understanding the Complexities of Fraud in Order to Develop Ways to Mitigate Risk

Date: 6/21/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Karl Egnatoff
Acronym: UCFR / Vendor: Phoenix Beach
Members: \$270 Non-Members: \$340

The Importance of Security for Digital Information

Date: 6/22/2017
Course Hours: 8:30-12 / CPE: 4
Instructor: Karl Egnatoff
Acronym: ISDI / Vendor: Phoenix Beach
Members: \$150 Non-Members: \$190

Preparation, Compilation, and Review Engagements: Update and Review

Date: 6/22/2017
Course Hours: 1:00-4:30 / CPE: 4
Instructor: Dana Maxwell
Acronym: CI4COMP / Vendor: AICPA
Members: \$150 Non-Members: \$190

Internal Controls for Small- and Medium-Sized Entities

Date: 6/23/2017
Course Hours: 8:30-12 / CPE: 4
Instructor: Daryl Krause
Acronym: CL4ICSM / Vendor: AICPA
Members: \$150 Non-Members: \$190

The New Clarified Attestation Standards: What You Need to Know

Date: 6/23/2017
Course Hours: 1:00-4:30 / CPE: 4
Instructor: Daryl Krause
Acronym: CL4CAS / Vendor: AICPA
Members: \$150 Non-Members: \$190

Employment Law Update: Key Risks and Recent Trends

Date: 6/26/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: William F. (Bill) Taylor, CPA
Acronym: LAWU / Vendor: AICPA
Members: \$270 Non-Members: \$340

Leases: Mastering the New FASB Requirements

Date: 6/27/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Thomas Sheets
Acronym: LEAS-2 / Vendor: AICPA
Members: \$270 Non-Members: \$340

Revenue Recognition: Mastering the New FASB Requirements

Date: 6/28/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Thomas Sheets
Acronym: INRR / Vendor: AICPA
Members: \$270 Non-Members: \$340

Form 1041: Income Taxation of Estates and Trusts

Date: 6/29/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Stephen Renberg
Acronym: ITET / Vendor: AICPA
Members: \$270 Non-Members: \$340

Income and Expense Recognition Strategies to Minimize Income Taxes

Date: 6/30/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Stephen Renberg
Acronym: INCT / Vendor: AICPA
Members: \$270 Non-Members: \$340

A+ College Savings Planning: Maximizing Resources and Tax Benefits

Date: 8/10/2017
Course Hours: 8:30-12 / CPE: 4
Instructor: William F. (Bill) Taylor, CPA
Acronym: CSP4 / Vendor: SURGENT
Members: \$150 Non-Members: \$190

Maximizing Your Social Security Benefits

Date: 8/10/2017
Course Hours: 1:00-4:30 / CPE: 4
Instructor: William F. (Bill) Taylor, CPA
Acronym: SSR4 / Vendor: SURGENT
Members: \$150 Non-Members: \$190

Ethics, Rules, and Regulations

Date: 9/20/2017
Course Hours: 8:30-12 / CPE: 4
Instructor: William F. (Bill) Taylor, CPA
Acronym: ERR-4 / Vendor: SELF
Members: \$150 Non-Members: \$190

Hot Tax Planning Developments Under the Current Tax Law

Date: 9/20/2017
Course Hours: 1:00-4:30 / CPE: 4
Instructor: William F. (Bill) Taylor, CPA
Acronym: CL4HOT / Vendor: AICPA
Members: \$150 Non-Members: \$190

Guide to the New Revenue Recognition Model for All CPAs

Date: 9/21/2017
Course Hours: 8:30-12 / CPE: 4
Instructor: Curtis J. Quickel, CPA
Acronym: REV4 / Vendor: SURGENT
Members: \$150 Non-Members: \$190

More than Meets the Eye: Examining the New Lease Accounting Standard

Date: 9/21/2017
Course Hours: 1:00-4:30 / CPE: 4
Instructor: Curtis J. Quickel, CPA
Acronym: NLS4 / Vendor: SURGENT
Members: \$150 Non-Members: \$190

Health Care Services Conference

Date: 9/22/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Panel
Acronym: HCSS / Vendor: SELF
Members: \$220 Non-Members: \$295

Oil and Gas Seminar

Date: 10/18/2017 - 10/19/2017
Course Hours: 8:30-4:30 / CPE: 16
Instructor: Mike Cougevan & Roger Gann
Acronym: PASM / Vendor: COPAS
Members: \$175 or \$325

Industry Conference

Date: 10/20/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Panel
Acronym: IND / Vendor: SELF
Members: \$150 Non-Members: \$225

Construction Contractors Advanced Issues

Date: 10/25/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Andy Copeland
Acronym: CCAI / Vendor: AICPA
Members: \$270 Non-Members: \$340

Accounting Educators' Symposium

Date: 10/27/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Panel
Acronym: AES / Vendor: SELF
Members: \$85 Non-Members: \$85

S Corporations: Key Issues, Compliance, and Tax Strategies

Date: 10/30/2017
Course Hours: 8:30-4:30 / CPE: 8
Instructor: Gordon Meicher
Acronym: SCORP / Vendor: AICPA
Members: \$270 Non-Members: \$340

1040 Tax Return Workshop

Date: 10/31/2017 – 11/01/2017
 Course Hours: 8:30-4:30 / CPE: 16
 Instructor: Gordon Meicher
 Acronym: IITW / Vendor: AICPA
 Members: \$385 Non-Members: \$535

Smart Tax Planning Strategies for Individuals

Date: 11/9/2017
 Course Hours: 8:30-12 / CPE: 4
 Instructor: William F. (Bill) Taylor, CPA
 Acronym: CL4CYCT / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Practical Tax Tips and Techniques for Closely-Held Businesses

Date: 11/9/2017
 Course Hours: 1:00-4:30 / CPE: 4
 Instructor: William F. (Bill) Taylor, CPA
 Acronym: CL4CHTX / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Complete Trust Workshop!

Date: 11/10/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Harris H. (Trip) Barnes, III
 Acronym: TCTW / Vendor: SURGENT
 Members: \$270 Non-Members: \$340

Business Valuation and Litigation Services Conference

Date: 11/17/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Panel
 Acronym: BVLS / Vendor: SELF
 Members: \$165 Non-Members: \$235

Mergers and Acquisitions: Tax and Due Diligence Considerations

Date: 11/30/2017
 Course Hours: 8:30-12 / CPE: 4
 Instructor: Edgar Gee
 Acronym: CL4IBA / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Mergers and Acquisitions: Strategies for the Right Tax Structure

Date: 11/30/2017
 Course Hours: 1:00-4:30 / CPE: 4
 Instructor: Edgar Gee
 Acronym: CL4MERC / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Accounting Methods and Periods: Including Form 3115

Date: 12/1/2017
 Course Hours: 8:30-12 / CPE: 4
 Instructor: Edgar Gee
 Acronym: CL4AMP / Vendor: AICPA
 Members: \$150 Non-Members: \$190

Reviewing Partnership Tax Returns: What Are You Missing?

Date: 12/1/2017
 Course Hours: 1:00-4:30 / CPE: 4
 Instructor: Edgar Gee
 Acronym: CL4PTRM / Vendor: AICPA
 Members: \$150 Non-Members: \$190

U.S. GAAP: Review for Business & Industry

Date: 12/13/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Ty Inglis
 Acronym: FASBI-2 / Vendor: AICPA
 Members: \$270 Non-Members: \$340

AICPA's Annual Federal Tax Update

Date: 12/14/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Jan Lewis
 Acronym: PTU-3 / Vendor: AICPA
 Members: \$270 Non-Members: \$340

NATCHEZ

Natchez Grand Hotel
 111 Broadway Street
 Natchez, MS 39120
 601-446-9994

Identity Theft: Preventing, Detecting, and Investigating Identity Theft

Date: 12/11/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Donna Ingram
 Acronym: IDENT-3 / Vendor: AICPA
 Members: \$270 Non-Members: \$340

Reviewing Pass-Through Tax Returns: What Are You Missing?

Date: 12/12/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: John Murphy
 Acronym: RPTR-3 / Vendor: AICPA
 Members: \$270 Non-Members: \$340

TUPELO

BancorpSouth Conference Center
 387 E. Main St.
 Tupelo, MS 38804
 662-718-5555

Ethics, Rules, and Regulations

Date: 6/13/2017
 Course Hours: 8:30-12 / CPE: 4
 Instructor: Donna Ingram
 Acronym: ERR-3 / Vendor: SELF
 Members: \$150 Non-Members: \$190

Fraud: War Stories From the Battlefield

Date: 6/13/2017
 Course Hours: 1:00-4:30 / CPE: 4
 Instructor: Donna Ingram
 Acronym: FWSB4 / Vendor: SELF
 Members: \$150 Non-Members: \$190

Identity Theft: Preventing, Detecting, and Investigating Identity Theft

Date: 6/13/2017
 Course Hours: 8:30-4:30 / CPE: 8
 Instructor: Douglas Warren
 Acronym: IDENT-1 / Vendor: AICPA
 Members: \$270 Non-Members: \$340

Determining How Much Money You Need to Retire, and Tax Ideas and Money Management in Retirement

Date: 6/14/2017

Course Hours: 8:30-4:30 / CPE: 8

Instructor: William F. (Bill) Taylor, CPA

Acronym: DRMM / Vendor: SURGENT

Members: \$270 Non-Members: \$340

K2's Tech Tools and Gadgets for a More Efficient You!

Date: 6/14/2017

Course Hours: 8:30-12 / CPE: 4

Instructor: Steve Yoss

Acronym: TTG-4 / Vendor: K2 Enterprises

Members: \$155 Non-Members: \$195

K2's Microsoft Office-Improving Productivity with New Features

Date: 6/14/2017

Course Hours: 1:00-4:30 / CPE: 4

Instructor: Steve Yoss

Acronym: OFF-4 / Vendor: K2 Enterprises

Members: \$155 Non-Members: \$195

Slashing Taxes for Your Small Business Clients: Corporations, Partnerships, & LLCs

Date: 6/15/2017

Course Hours: 8:30-4:30 / CPE: 8

Instructor: William F. (Bill) Taylor, CPA

Acronym: STSB-1 / Vendor: AICPA

Members: \$270 Non-Members: \$340

K2's QuickBooks Online and Other Top Accounting Software for Small Businesses

Date: 6/15/2017

Course Hours: 8:30-4:30 / CPE: 8

Instructor: Steve Yoss

Acronym: QOA / Vendor: K2 Enterprises

Members: \$275 Non-Members: \$345

The Bottom Line on the New Lease Accounting Requirements

Date: 11/14/2017

Course Hours: 8:30-12 / CPE: 4

Instructor: Ty Inglis

Acronym: CL4LEAS / Vendor: AICPA

Members: \$150 Non-Members: \$190

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

Date: 11/14/2017

Course Hours: 1:00-4:30 / CPE: 4

Instructor: Ty Inglis

Acronym: CL4INRR-2 / Vendor: AICPA

Members: \$150 Non-Members: \$190

Cut Your Client's Tax Bill: Individual Tax Planning Tips and Strategies

Date: 11/14/2017

Course Hours: 8:30-4:30 / CPE: 8

Instructor: William F. (Bill) Taylor, CPA

Acronym: CYCT / Vendor: AICPA

Members: \$270 Non-Members: \$340

AICPA's Annual Federal Tax Update

Date: 11/15/2017

Course Hours: 8:30-4:30 / CPE: 8

Instructor: Peter Towle

Acronym: PTU-1 / Vendor: AICPA

Members: \$270 Non-Members: \$340

Yellow Book: Government Auditing Standards

Date: 11/15/2017

Course Hours: 8:30-4:30 / CPE: 8

Instructor: Cecil M. (Bill) Felder

Acronym: EO-YB-1 / Vendor: AICPA

Members: \$270 Non-Members: \$340

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