

IN MEMORIAM

JAMES F. "FRANK" BETTS, JR.

Jackson

Died April 15, 2020



ROGER P. FRIOU, JR.

Jackson

Died April 17, 2020

MEMORIAL GIFT

to the
EDUCATION FOUNDATION

in memory of

JAMES F. "FRANK" BETTS, JR.

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by

JIMMY DAVIS

Oxford



by

EMMITTE J. HADDOX

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MSCPA

MISSISSIPPI SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS
VOLUME XLIV
APRIL 2020

MSCPA Chairman-Elect Annette Pridgen Names Committee Chairmen for 2020-2021

MSCPA Chairman-Elect Annette Pridgen has named Committee Chairmen to serve in the 2020-2021 fiscal year. Representatives of the millennial generation have been named as Millennial Chairs.

Accounting & Auditing.....	Shannon Adams, <i>Ridgeland</i> Millennial Chairman: Jabe Mills, <i>Hattiesburg</i>
Advisory to State Board	Ed Jones, <i>Pascagoula</i> Millennial Chairman: Josh Norris, <i>Jackson</i>
Awards, Education & Scholarships	Shawn Mauldin, <i>Starkville</i> Millennial Chairman: Jessica Sumrall, <i>Jackson</i>
Banking.....	Tom Walker, <i>Jackson</i> Millennial Chairman: Peyton Cavin, <i>Natchez</i>
Business Valuation & Litigation Support.....	Rob King, <i>Hattiesburg</i> Millennial Chairman: Kimberly Hardy, <i>Ridgeland</i>
Continuing Professional Education	Bill Taylor, <i>Taylor</i> Millennial Chairman: Yale Murphy, <i>Ridgeland</i>
Firm Administration & Development	Lynn Lister, <i>Ridgeland</i> Millennial Chairman: Katie Feibelman, <i>Vicksburg</i>
Governmental Accounting & Auditing	Lydia Windham, <i>Jackson</i> Millennial Chairman: Phillip Chu, <i>Jackson</i>
Health Care Services.....	Julia Jesuit, <i>Ridgeland</i> Millennial Chairman: Walker Roberts, <i>Jackson</i>
Industry	Kimberly Williams, <i>Madison</i> Millennial Chairman: Allison Garner, <i>Oxford</i>
Insurance Trust.....	Lance Mize, <i>Nashville</i> Millennial Chairman: Caitlin Goodman, <i>Natchez</i>
Legislation.....	Linda Keng, <i>Jackson</i> Millennial Chairman: Matt Bailey, <i>Jackson</i>
Long Range Planning	Scott Christian, <i>Natchez</i> Millennial Chairman: Wil Crawford, <i>Jackson</i>
Not-for-Profit.....	Julia Bradley, <i>Ridgeland</i> Millennial Chairman: Cammy Nguyen, <i>Ridgeland</i>
Professional Conduct	Morgan Geoghagan, <i>Brandon</i> Millennial Chairman: Tolliver McMullen, <i>Ridgeland</i>
Taxation	David Lynch, <i>Jackson</i> Millennial Chairman: Samantha Moore, <i>Ridgeland</i>
Young CPA Liaison	Kim Ashworth, <i>Jackson</i> Millennial Chairman: Melanie Hamel, <i>Ridgeland</i>

MSCPA 2020 Convention Cancelled

Due to the COVID-19 pandemic, the MSCPA's Board of Directors has made the difficult decision to cancel the 2020 Convention scheduled for June 24-28 in Florida. Given the current circumstances and the uncertainty of future weeks restrictions, the Board determined that cancelation is the only way to ensure that the health and safety of our members, sponsors and exhibitors. Extended tax deadlines, business budget restrictions on travel and conferences, projected low attendance, lack of events staff at the resort, and the net cost to the Society were also factors in this difficult decision.

"The decision to cancel the annual convention is particularly unfortunate given this was to be the culmination of our yearlong celebration of the Society's 100-year anniversary," said Donna Bruce, MSCPA Chairman. "Special plans had

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*Published
by the
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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

CHAD ALLGOOD

Harper, Rains, Knight & Company
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Harper, Rains, Knight & Company
Ridgeland

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Mississippi Power Company
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BRYCE KETTLEMAN

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Ridgeland

JAMES JARROD MOORE

Tunica

SARAH M. TUCKER

Harper, Rains, Knight & Company
Ridgeland

CONVENTION

continued from page 1

been made to recognize members and our Society's accomplishments. We will now move to making alternative arrangements to appropriately recognize the Centennial milestone in a different fashion."

If you have already reserved accommodations and wish to cancel, you will need to contact the resort

directly. Registrations will be refunded or applied to your MSCPA profile account. The MSCPA will contact each registrant for preference.

The MSCPA is also exploring virtual platforms for the 2020 Annual Meeting to be held June 18. More details will follow in the near future.

2020 COMMITTEE DAY CANCELLED

Committees to Meet Virtually or Via Conference Call

The 2020 Committee Day and Leadership Luncheon scheduled for May 7 at the MSCPA Training Center in Ridgeland was cancelled. Incoming Chairmen are asked to determine dates for their Committees to meet virtually or via conference calls. MSCPA President/CEO, Karen Moody, will distribute updated Committee rosters to each Chairman. Committees that plan conferences are encouraged to meet in May if schedules permit.

Staff News

MSCPA would like to recognize **NOMA GILLIS** for her 30 years of dedication and hard work at the Society. Noma started working for the Society in April of 1990 as CPE Registrar. She transitioned to Peer Review Coordinator in December of 1997 and then to her current position of Membership Coordinator in July 2019.





CONGRATULATIONS MSCPA ON

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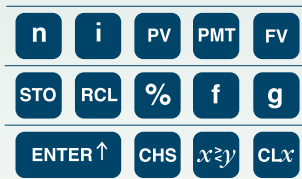
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Member News

Watkins, Ward and Stafford, PLLC Admits New Member

Watkins, Ward and Stafford, PLLC has announced the admittance of **Ed Maxwell, CPA** as the newest member of the firm, effective May 1, 2020. Maxwell is a native of New Albany and has spent the past four years with Watkins, Ward and Stafford, PLLC, as the manager of their Oxford office.

Ed graduated from Mississippi State University with a Bachelor of Accountancy and Master of Taxation degrees. He is a member of the MSCPA Young CPA Network and has served on the YCPA Network Board of Directors and on the Awards, Education and Scholarships Committee.

Ed is an active member of the Oxford Rotary Club where he currently serves as the organization's treasurer. He is married to Nicole Maxwell and has one daughter, Miller. He and his family are also active members of Oxford University United Methodist Church where he serves on the finance committee.



Mississippi Society of Certified Public Accountants

INCORPORATED UNDER THE LAWS
OF THE STATE OF MISSISSIPPI

NOTICE OF VIRTUAL CONFERENCE IN LIEU OF ANNUAL MEETING

Notice is hereby given of a virtual conference of the members of the Mississippi Society of Certified Public Accountants (the "Society") to be held at 1:30 p.m. CST on June 18, 2020, in lieu of the annual business meeting that would normally be held at the Society's annual convention under the provisions of Section 1 of Article IX of the Society's bylaws. This virtual meeting will consist of reports from officers and other communications typically made as part of the Society's annual meeting; however, due to limitations imposed by state law, the election of directors and officers as well as any other official business for which a vote must be taken will be conducted pursuant to Section 79-11-211 of the Mississippi Code of 1972, as amended, which allows for corporate action to be taken by ballot without an annual meeting of members at the convention as contemplated by the Society's bylaws. Ballots will be delivered to members of the Society for this purpose at a later date, prior to the virtual meeting, and all members are strongly encouraged to return their completed ballots as requested in order to ensure the conduct of corporate business as required by the Society's bylaws and Mississippi law. More information regarding the means for conducting the virtual meeting and the instructions needed for participation will also be delivered to all members of the Society prior to the meeting. If you have any questions about the virtual meeting or the conduct of corporate business by ballot this year in lieu of an annual member meeting at convention, please feel free to call Tom Walker, MSCPA Secretary, at 601-949-4900.



Meet Our Members

Legacy Spotlights

As a tribute to the 100th Anniversary of the MSCPA, we want to spotlight members during our year-long Centennial Celebration who are legacies of the profession – MSCPA members whose family is or was also a MSCPA member CPA, accountant, or accounting student. If you or someone you know is a legacy of the profession, please email names and contact information to jtruhett@ms-cpa.org.

R Buck Coats



Coates, Buck

R Buck Coats graduated from Mississippi State University with a Bachelor of Science Degree in 1979. Over the next many years Buck worked with several CPA firms through mergers and retired from Horne LLP in 2016. Buck was fortunate enough to have participated in various leadership roles, and to have the opportunity to work with many very talented individuals as the profession transformed from a traditional service focus to a myriad of career paths. Buck is a member of the AICPA Tax Section, MSCPA Central Chapter, and has served on various committees in the past. After establishing the firm of R Buck Coats CPA

PC in September of 2016, Buck has served small business and individual tax clients. In December 2019 Buck welcomed his daughter Nickie into the firm. Buck and his wife, Tina, live in Gluckstadt and have a second daughter, Allie, a Mississippi State graduate and first grade teacher, and a third daughter, Sarie, who is working toward a Mechanical Engineering degree at Mississippi State.

Nickie C. Jones



Jones, Nickie

Buck's daughter, Nickie C. Jones, graduated from Mississippi State University, where she earned a Bachelor of Accounting degree in 2010 and a Master of Taxation degree in

2011. She has over 9 years of experience in public accounting which includes income tax planning and compliance for businesses and individuals as well as trust and estate taxation. She is a member of the AICPA, the Young CPA Network, the Central Chapter and the Accounting and Financial Women's Alliance. Nickie serves as a trustee of the Frances Rushton Memorial Scholarship Fund. She has also served as a Passion Committee member for the American Heart Association. She works in Madison as a Partner at R Buck Coats CPA PC. Nickie and her husband, Brandon, live in Flowood with their daughter, Jennie.

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**MATTHEWS
CUTRER and
LINDSAY, P.A.**

CERTIFIED PUBLIC ACCOUNTANTS

MDOR EXTENDS TAX FILING AND PAYMENTS TO JULY 15

After continuing to advocate for an extension that coincides with the federal extension, MSCPA notified members via email on May 6 that the Mississippi Department of Revenue (MDOR) revised the filing deadline decision of May 15 and released the following notice extending the tax filing deadline to July 15. This includes payment of any balance due for 2019 and estimated payments.



MISSISSIPPI DEPARTMENT OF REVENUE

Income Tax Bureau

Notice 80-20-002

May 5, 2020

INCOME TAX FILING DEADLINE

After consultation with the Governor, Lieutenant Governor and Speaker of the House of Representatives, Mississippi has extended the due date for filing income tax returns and making first quarter and second quarter estimated payments to July 15, 2020. This extension applies to Individual Income Tax returns, Corporate Income and Franchise Tax returns, and Fiduciary Income Tax returns.

P.O. Box 1033

Jackson, MS 39215

www.dor.ms.gov

Phone: 601.923.7700

FAX: 601.923.7714

MSCPA Taxation Committee, leadership and members are commended for their efforts to secure relief for our membership and taxpayers.

On May 1, MSCPA also notified members of tax filing guidance released by MDOR per our request and of other issues that were discussed. MDOR NOTICE 80-20-001 that was included in that email is now superseded. Other topics addressed included contributions and the State implications of the CARES Act. MDOR indicated that further information on the CARES ACT will be provided later. Highlights of our discussion are below.

Contributions

IRA, HSA and MPACT contributions can be made up to the extended federal 7/15 deadline for the 2019 tax year for Mississippi purposes.

Taxation of PPP Loan Forgiveness

The CARES Act provides that the debt discharge of a PPP loan is excluded from the gross income of the business for federal income tax purposes. Forgiveness is limited, based upon the payment of qualifying expenses and the maintenance of employee count and compensation. Currently the Mississippi tax code does not exclude the forgiveness of debt from income. Legislative action will need to be taken to address this issue. MSCPA is following up through our advocacy program. If the Legislature does not address this issue currently, the issue will be readdressed next year.

NOL Carryback

The CARES Act temporarily suspends the existing taxable income limitations on NOLs, allowing NOLs to offset the business's full taxable income for taxable years beginning before January 1, 2021. Additionally, the CARES Act enables NOLs arising in 2018, 2019 or 2020 tax year to be carried back five years. Mississippi does not follow Federal law with regard to the NOL carryback and currently has a 2 year carryback period absent additional Legislative action.

SAS No. 141 Delays SAS Nos. 134-140

Effective Dates, Permits Early Implementation

The Auditing Standards Board has issued Statement on Auditing Standards No. 141, *Amendment to the Effective Dates of SAS Nos. 134–140*. As a result of the COVID-19 pandemic, the ASB believes it is in the public interest and welcome relief to members to 1) delay by one year the effective date of SAS Nos. 134–140 (which, among other things, substantially changes the auditor's report) from December 15, 2020, to December 15, **2021**, and 2) also permits early implementation of this suite of standards.

SAS No. 141 becomes effective upon issuance.

The ASB has previously issued Statement on Auditing Standards No. 140, *Amendments to AU-C Sections 725, 730, 930, 935, and 940 to Incorporate Auditor Reporting Changes From SAS Nos. 134 and 137*. With this issuance, the ASB has completed its year-long effort to conform GAAS with the reporting provisions of SAS No. 134, *Auditor Reporting and Amendments, Including Amendments Addressing Disclosures in*

the Audit of Financial Statements, and other recently issued SASs. In addition, certain other AU-C sections in AICPA *Professional Standards* have been amended to reflect practice issues that have arisen since the most recent revisions to these AU-C sections, including revisions to AU-C section 935, *Compliance Audits*, for consistency with the recent issuance of Uniform Guidance, changes in the OMB Compliance Supplement, and the most recently issued Yellow Book.



MSCPA COVID-19 RESOURCES

Visit our MSCPA COVID-19 Resources webpage for MSCPA events updates, webcasts, helpful links and news updates.



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Mississippi Rule 26 Amended and Its Effect on CPAs

By Brian Schmittling, CPA/ABV/CFF & Jim Koerber, CPA/ABV/CFF

For CPAs providing expert witness services, it is important to stay current not only with case law, but also the requirements for expert witnesses. In 1993, Rule 26 of the Federal Rules of Civil Procedure was amended to provide for mandatory disclosure of all attorney-expert communications, including draft reports. This led to costly practices such as hiring two experts: a consulting expert, whose communications were not discoverable, and a testifying expert, whose communications were discoverable. If a consulting expert became a testifying expert, all prior communications were generally discoverable. In December 2010, a change was made to Rule 26 relating to attorney-expert communications. An expert's draft report was no longer discoverable and was protected under the work product doctrine. In

addition, communications between attorneys and experts were protected, with the exception of the expert's compensation and any assumptions the attorney provided to the expert. The 2010 changes only applied to cases tried in federal courts. States were not required to adopt these changes.

Fast forward to 2020. Rule 26 of the Mississippi Rules of Civil Procedure was amended effective January 1, 2020 to more closely match Federal Rule 26. Draft reports are no longer discoverable under Mississippi's Rule 26. The Mississippi Rules of Civil Procedure state:

Rule 26(b)(3) protects drafts of any interrogatory responses required under Rule 26(b)(4) (A)(ii) or other expert disclosures regardless of the form in which the draft is recorded.

Communications between experts and attorneys are similarly protected under Mississippi's amended Rule 26, as indicated in the following excerpt from the Mississippi Rules of Civil Procedure:

Rule 26(b)(3) protects communications between the party's lawyer or representative of the lawyer and any expert witness who has been retained or specially employed to present evidence at trial under Mississippi Rules of Evidence 702, 703, or 705, regardless of the form of the communications, except to the extent that the communications: (i) relate to compensation for the expert's study or testimony; (ii) identify facts or data that the party's attorney provided and that the expert considered in forming the opinions to be expressed; or (iii) identify assumptions that the party's attorney provided and that the expert relied upon in forming the opinions expressed.

An expert's compensation can be

disclosed in the expert report. Assumptions that a party's attorney provided can also be disclosed in the expert report. Amended Rule 26(b)(3) requires disclosure of the data the expert considered when forming an opinion, not just the data relied upon. Thus, it is prudent for the expert to disclose all facts or data the party's attorney provided, as well as any peer-reviewed publications relied upon.

Rule 26(f) imposes a duty to supplement an expert report when additional or corrective information is discovered. It is not necessary to supplement an expert report each time new information is learned. Supplemental reports should be prepared during the discovery period and with promptness as the trial date approaches.

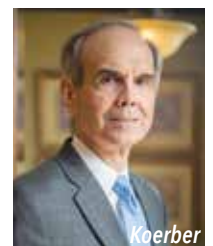
In addition to the witness's qualifications, the amended Mississippi Rule 26 requires the expert witness's Curriculum Vitae must include a list of all publications authored by the witness in the previous ten years and a list of all cases in which the witness testified as an expert at trial or by deposition during the previous ten years.

The above changes to Mississippi's Rule 26 are consistent with Federal Rule 26. There are other changes to Mississippi's Rule 26 regarding discovery, interrogatories, and depositions, primarily directed toward attorneys, which are beyond the scope of this article.

Brian Schmittling, CPA/ABV/CFF, and Jim Koerber, CPA/ABV/CFF, are shareholders in The Koerber Company, PA, a Hattiesburg CPA firm that limits its services to business valuation and forensic economics/accounting.



Schmittling



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Title	Est. Pub. Date	Media Issue #	List Price	Discounted Price
US Master Tax Guide, 2020, Special Edition	Jun. 2020	10064134-0002	\$139.00	\$99.00
SECURE Act 2020: Law, Explanation & Analysis	Feb. 2020	10082591-0001	\$149.00	\$104.30
Income Tax Regulations: Tax Cuts and Jobs Act Final, Temporary and Proposed Regulations Supplement	Feb. 2020	10071565-0002	\$135.00	\$94.50
Tax Problems & Solutions Handbook	Apr. 2020	10080356-0001	\$129.00	\$90.30
Income Tax Regulations, Summer 2020	Jun. 2020	10037777-0006	\$309.00	\$216.30
Internal Revenue Code: Income, Estate, Gift, Employment & Excise Taxes (Summer 2020)	Jun. 2020	10037776-0006	\$219.00	\$153.30
US Master Estate and Gift Tax Guide, 2021	Jun. 2020	10031732-0011	\$179.00	\$125.30
Federal Income Tax: Code & Regulations -- Selected Sections (2020-2021)	Jun. 2020	10014873-0011	\$115.00	\$80.50
Government GAAP Guide, 2021	Aug. 2020	10016980-0013	\$499.00	\$349.30
GAAP Financial Statement Disclosures Manual, 2020-2021	Aug. 2020	10029932-0014	\$499.00	\$349.30
Multistate Corporate Tax Guide --Mid Yr Ed 2020	Aug. 2020	10036593-0007	\$485.00	\$339.50
Coronavirus (COVID-19) Tax Relief - Law, Explanation & Analysis	Apr. 2020	10015609-0021	\$169.00	\$126.75

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If you need assistance, contact our Association Account Mgr, Tammy Nickels, at 877-571-2841 or tammy.nickels@wolterskluwer.com.



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Young CPA Conference

MSCPA officially kicked off "CPE season," Wednesday, April 29, with our virtual Young CPA Conference, sponsored by NOLA Lending Group. Over 80 online attendees heard from speakers Paul Mellor, Mandi Stanley, Donna Ingram and Bill Crim via livestream.

Peyton Gordon, Tax Associate with BKD, and **Lee Pittman**, Field Audit Specialist with the Mississippi Office of the State Auditor, were elected to the YCPA Network Board of Governors during the YCPA Business Meeting.

Thank you to the Young CPA Network for planning such a great event.



MSCPA to Livestream 69 Courses and 7 Conferences in 2020 – More To Be Added



MSCPA is excited to provide you with a new online catalog of our 2020 CPE course offerings. Use our online catalog to find a course or conference close to you or one you can attend from your computer.

We will also be adding more CARES Act and PPP courses so check back frequently for the latest classes.

The MSCPA 2020 printed CPE Catalog was mailed to your preferred mailing address in April. Visit our CPE Catalog webpage to download a PDF. Be sure and check out the cover collage of photos!

MSCPA is dedicated to offering the highest quality, highest value continuing education programs to our members. Your support is critical to our success! Start planning your CPE today - and thank you for choosing the MSCPA as your provider of continuing education.

Livestreaming All May and June Courses

While staff and building management are following CDC guidelines to limit risk, out of an abundance of caution, we will be livestreaming all May and June courses and conferences from

our MSCPA Training Center in Ridgeland. In person classes will resume once CDC and MS restrictions are lifted.

The MSCPA has also cancelled all In Person Courses in Biloxi (June 10-12) and Tupelo (June 16-18). Many of those classes were moved to August and will be available in person in Ridgeland and also via livestream.

MSCPA produces real-time webinars right here in our MSCPA Training Center in Ridgeland, offering quality CPE via your computer or mobile device. These livestream courses let you tune in remotely and even submit questions for the presenter. To find our MSCPA online courses, select **Online MSCPA Course** from the training type drop down.

We also partner with other CPE providers at a reduced cost for our members. All live webinar, webcast and self-study registrations and payments are now done through the MSCPA website and will be included on your transcript that can be printed from your My CPE on the MSCPA website. To register, visit our online CPE Catalog at www.ms-cpa.org/education/cpe-catalog. Use the Training Type filter to find all of our **Online Partner Courses**. You can also browse the different providers listed in our Vendor filter.



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Business & Industry Management Development Conference

Wednesday,
May 13, 2020

Agenda

8:30am – 10:10am	What's Keeping HR Up at Night Melissa MacMillan, HR Solutions
10:10am – 10:20am	Morning Break
10:20am – 12:00pm	What Can We Do With All This Data? Data Analytics for Accountants in Industry Jonathan Legner, J.T. Blaylock, and Jeff Oucoin, HORNE LLP
12:00pm – 12:50pm	Lunch
12:50pm – 2:30pm	Business Interruption Claims – Beyond the Basics: An Accountant's Perspective Joseph Hines, Tann, Brown & Russ Company, PLLC
2:30pm – 2:40pm	Afternoon Break
2:40pm – 3:30pm	Mississippi Corporate Tax Audit Basics Dos and Don'ts Robert Zischke, HORNE LLP
3:30pm – 4:20pm	Securing Mississippi's Future – Relief, Recovery, Reimagine Scott Waller, Mississippi Economic Council

Conference Information



Livestreaming from the
MSCPA Training Center in
Ridgeland



Member Price: \$180



Credits: 7 General / 1 Taxation



This conference is geared
toward chief financial
officers, controllers and
other executives in industry,
managers, and partners in
public accounting.

ACCOUNTING AND AUDITING CONFERENCE



**Thursday,
May 14,
2020**



Livestreaming from
the MSCPA Training
Center in Ridgeland

Member Price: \$225
Credits: 8 A&A

Agenda

- | | |
|-------------------|--|
| 8:30am – 12:00pm | Accounting & Auditing Update for the Real World
Jim Martin, General Practitioner |
| 12:00pm – 12:50pm | Lunch |
| 12:50pm – 2:30pm | Data Analytics
Jeremy Griffin, University of Mississippi |
| 2:30am – 2:40pm | Afternoon Break |
| 2:40pm – 4:20pm | Tech Essentials for SMB and Corporate Clients –
Efficiency, Reliability, and Security
Coy Gauthier, SCS, LLC |

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.

www.ms-cpa.org

Technology Conference

Monday - Tuesday,
May 18 - 19, 2020



*Livestreaming from the MSCPA
Training Center in Ridgeland*

This two-day event attracts public, industry, and technology focused individuals seeking best practices in technology. Be impressed by the best tools, software, and resources to help you succeed. This year K2 Enterprises brings a variety of new sessions. Technology has forever changed the business world. Do you have the knowledge you need to move forward? Are you as effective as you can be within your organization or for your clients? Can you remain competitive?



Credits: 16 General
Member Price: \$385

Agenda

Monday, May 18, 2020

- 8:30am - 10:10am Tech Update - A 2020 Vision
Larry McClelland, K2 Enterprises
- 10:10am - 10:20am Morning Break
- 10:20am - 12:00pm Mastering Advanced Excel Functions and Formulas
Larry McClelland, K2 Enterprises
- 12:00pm - 12:50pm Lunch
- 12:50pm - 2:30pm Improving Productivity with Office 365 Cloud Applications
Larry McClelland, K2 Enterprises
- 2:30pm - 2:40pm Afternoon Break
- 2:40pm - 4:20pm Current Tech Crimes-Ripped from the Headlines
Thomas Stephens, K2 Enterprises

Tuesday, May 19, 2020

- 8:30am - 10:10am The Very Real Risk of Ransomware
Thomas Stephens, K2 Enterprises
- 10:10am - 12:00pm Understanding Workflow and Automation Essentials
Larry McClelland, K2 Enterprises
- 12:00pm - 12:50pm Lunch
- 12:50pm - 1:40pm The Perfect Storm-Data Governance and Data Privacy Regulations
Thomas Stephens, K2 Enterprises
- 1:40pm - 2:30pm Emerging Technologies-2020 and Beyond
Larry McClelland, K2 Enterprises
- 2:30pm - 2:40pm Afternoon Break
- 2:40pm - 4:20pm Next Generation Excel Reporting
Larry McClelland, K2 Enterprises



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Young CPA Conference

Wednesday, April 29, 2020
8:30 AM | Gen: 2 / PD: 6
Instructor: Various
Member Price: \$125

MS Sales and Use Tax

Monday, May 11, 2020
8:30 AM | Tax: 4
Instructor: Greg Duke
Member Price: \$160

Ethics, Rules, and Regulations

Monday, May 11, 2020
1:00 PM | Ethics: 4
Instructor: Donna Ingram
Member Price: \$160

Business & Industry: Management Development Conference

Wednesday, May 13, 2020
8:30 AM | Gen: 8
Instructor: Various
Member Price: \$180

Accounting and Auditing Conference

Thursday, May 14, 2020
8:30 AM | A&A: 8
Instructor: Various
Member Price: \$225

MS Technology Conference

Monday, May 18-19, 2020
8:30 AM | Gen: 16
Instructor: Various
Member Price: \$385

Fraud Update: Detecting and Preventing the Top Ten Fraud Schemes

Wednesday, May 20, 2020
8:30 AM | A&A: 8
Instructor: Glenn Helms
Member Price: \$280

Audit Working Papers: Documenting and Reviewing Field Work

Thursday, May 21, 2020
8:30 AM | A&A: 8
Instructor: Glenn Helms
Member Price: \$280

Internal Control and COSO Essentials for Financial Managers, Accountants, and Auditors

Friday, May 22, 2020
8:30 AM | A&A: 8
Instructor: Glenn Helms
Member Price: \$280

Advanced Controller and CFO Skills

Tuesday, May 26, 2020
8:30 AM | A&A: 8
Instructor: Curtis Quickel
Member Price: \$280

Accounting and Auditing Update for Small Businesses

Wednesday, May 27, 2020
8:30 AM | A&A: 8
Instructor: Curtis Quickel
Member Price: \$280

Audits of 401(k) Plans

Thursday, May 28, 2020
8:30 AM | A&A: 8
Instructor: Bill Felder
Member Price: \$280

Business Law Essentials for Practitioners and Controllers

Friday, May 29, 2020
8:30 AM | Gen: 8
Instructor: Trip Barnes
Price: \$280

Evaluating Fraud Risk in a Financial Statement Audit

Monday, June 1, 2020
8:30 AM | A&A: 4
Instructor: Bob Mims
Member Price: \$160

Auditing Deficiencies in Peer Reviews: Focus on Engagement Quality

Monday, June 1, 2020
1:00 PM | A&A: 4
Instructor: Bob Mims
Member Price: \$160

Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses

Tuesday, June 2, 2020
8:30 AM | A&A: 4
Instructor: Bob Mims
Member Price: \$160

Top 10 Technology Risks and Trends Every CPA Should Know

Tuesday, June 2, 2020
1:00 PM | A&A: 4
Instructor: Bob Mims
Member Price: \$160

Maximizing Your Social Security Benefits

Wednesday, June 3, 2020
8:30 AM | Tax: 4
Instructor: Bill Taylor
Member Price: \$160

Required Minimum Distributions: Compliance and Planning

Wednesday, June 3, 2020
1:00 PM | Tax: 4
Instructor: Bill Taylor
Member Price: \$160

Surgent's S Corporation, Partnership, and LLC Tax Update

Thursday, June 4, 2020
8:30 AM | Tax: 4
Instructor: Bill Taylor
Member Price: \$160

Critical Issues That Tax Public Accountants Will Need to Face This Year

Thursday, June 4, 2020
1:00 PM | Tax: 4
Instructor: Bill Taylor
Member Price: \$160

Employer's Handbook: Health Care, Retirement, and Fringe Benefit Tax Issues

Friday, June 5, 2020
8:30 AM | Gen: 2 / Tax: 2
Instructor: Bill Taylor
Member Price: \$160

The Top Five Tax Issues in Dealing with LLCs and Partnerships

Friday, June 5, 2020
1:00 PM | Tax: 4
Instructor: Bill Taylor
Member Price: \$160

Governmental Accounting and Auditing Update

Monday, June 8, 2020
8:30 AM | A&A: 8
Instructor: Bill Felder
Price: \$280

Succession Planning for the Small Business Owner: Finding the Exit Ramp

Tuesday, June 9, 2020
8:30 AM | Tax: 4
Instructor: Trip Barnes
Member Price: \$160

This Year's Top Tax and Financial Planning Ideas

Tuesday, June 9, 2020
1:00 PM | Tax: 4
Instructor: Trip Barnes
Member Price: \$160

Construction Contractors Advanced Issues

Wednesday, June 10, 2020
8:30 AM | A&A: 8
Instructor: Andrew Copeland
Member Price: \$280

Advanced Topics in a Single Audit

Thursday, June 11, 2020
8:30 AM | A&A: 8
Instructor: Robert Bedwell
Price: \$280

ONLINE MSCPA COURSES CONTINUED

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

Friday, June 12, 2020
8:30 AM | A&A: 8
Instructor: Robert Bedwell
Price: \$280

Using Internal Control to Strengthen Security, Efficiency, and Employee Conduct

Monday, June 15, 2020
8:30 AM | A&A: 8
Instructor: Karl Egnatoff
Member Price: \$280

The Importance of Security for Digital Information

Tuesday, June 16, 2020
8:30 AM | A&A: 4
Instructor: Karl Egnatoff
Member Price: \$160

How Fraud Can Affect Smaller Organizations

Tuesday, June 16, 2020
1:00 PM | A&A: 4
Instructor: Karl Egnatoff
Member Price: \$160

Working With Excel PivotTables – Powerful and Not Hard to Use...Really!

Wednesday, June 17, 2020
8:30 AM | General: 8
Instructor: Karl Egnatoff
Member Price: \$280

Metrics Management: Choose and Use Key Performance Indicators

Thursday, June 18, 2020
8:30 AM | A&A: 8
Instructor: Bob Mims
Member Price: \$290

The Tactical CFO: Make Your Business Processes Work for You

Friday, June 19, 2020
8:30 AM | A&A: 8
Instructor: Bob Mims
Member Price: \$290

Corporate Finance Check-up: Renovate Your Analytical Toolbox

Monday, June 22, 2020
8:30 AM | A&A: 8
Instructor: Don Minges
Member Price: \$290

Create Reports that Matter: Turn Information into Action!

Tuesday, June 23, 2020
8:30 AM | General: 8
Instructor: Don Minges
Member Price: \$290

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

Wednesday, June 24, 2020
8:30 AM | A&A: 8
Instructor: Wayne Wells
Member Price: \$280

U.S. GAAP: Review Business & Industry

Thursday, June 25, 2020
8:30 AM | A&A: 8
Instructor: Wayne Wells
Member Price: \$280

Best Practices for Payroll Taxes and 1099 Issues

Friday, June 26, 2020
8:30 AM | Tax: 8
Instructor: Beth Stenberg
Member Price: \$280

Guided Tour of the Form 990 and Its Schedule

Monday, June 29, 2020
8:30 AM | Tax: 8
Instructor: Brian Yacker
Member Price: \$280

2020 Nonprofit Tax/Accounting Update

Tuesday, June 30, 2020
8:30 AM | A&A: 8
Instructor: Brian Yacker
Member Price: \$280

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

Monday, August 3, 2020
8:30 AM | Tax: 8
Instructor: Bill Taylor
Member Price: \$280

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

Tuesday, August 4, 2020
8:30 AM | Tax: 8
Instructor: Bill Taylor
Member Price: \$280

S Corporations: Key Issues, Compliance, and Tax Strategies

Wednesday, August 5, 2020
8:30 AM | Tax: 8
Instructor: Bill Taylor
Member Price: \$280

Employer's Handbook: Legal, Tax, and Health Care Issues

Thursday, August 6, 2020
8:30 AM | Gen: 5 / Tax: 3
Instructor: Bill Taylor
Member Price: \$280

Surgent's Comprehensive Guide to Tax Depreciation, Expensing, and Property Transactions

Friday, August 7, 2020
8:30 AM | Tax: 8
Instructor: Bill Taylor
Member Price: \$280

Securing a Comfortable Retirement in the Age of Spending

Monday, August 10, 2020
8:30 AM | Tax: 8
Instructor: Bill Taylor
Member Price: \$280

Reviewing Individual Tax Returns: What Are You Missing?

Tuesday, August 11, 2020
8:30 AM | Tax: 4
Instructor: Bill Taylor
Member Price: \$160

Reviewing Partnership Tax Returns: What Are You Missing?

Tuesday, August 11, 2020
1:00 PM | Tax: 4
Instructor: Bill Taylor
Member Price: \$160

Real-World Fraud Found in Governments and Not-for-Profits

Wednesday, August 12, 2020
8:30 AM | A&A: 8
Instructor: Donna Ingram
Member Price: \$280

Governmental Accounting and Auditing Update

Monday, August 17, 2020
8:30 AM | A&A: 8
Instructor: Bill Felder
Member Price: \$280

Best Practices for Payroll Taxes and 1099 Issues

Tuesday, August 18, 2020
8:30 AM | Tax: 8
Instructor: Bill Taylor
Member Price: \$280

Maximizing Your Social Security Benefits

Wednesday, August 19, 2020
8:30 AM | Tax: 4
Instructor: Bill Taylor
Member Price: \$160

The Top Five Tax Issues in Dealing with LLCs and Partnerships

Wednesday, August 19, 2020
1:00 PM | Tax: 4
Instructor: Bill Taylor
Member Price: \$160

Financial Statement Disclosures: A Guide for Small- and Medium-Sized Businesses

Thursday, August 20, 2020
8:30 AM | A&A: 4
Instructor: Bob Mims
Member Price: \$160

Auditing Deficiencies in Peer Reviews: Focus on Engagement Quality

Thursday, August 20, 2020
1:00 PM | A&A: 4
Instructor: Bob Mims
Member Price: \$160

Current Developments and Best Practices for Today's CFOs and Controllers

Friday, August 21, 2020
8:30 AM | A&A: 8
Instructor: Bob Mims
Member Price: \$280

ONLINE MSCPA COURSES CONTINUED

FASB Update for Small- and Medium-Sized Businesses: A Practical Implementation Guide

Tuesday, August 25, 2020

8:30 AM | A&A: 8

Instructor: Bill Felder

Member Price: \$280

The Year's Best Income Tax, Estate Tax, and Financial-Planning Ideas

Wednesday, August 26, 2020

8:30 AM | Tax: 8

Instructor: Trip Barnes

Member Price: \$280

Agriculture and Farm Activities Conference

Thursday, August 27, 2020

8:30 AM | Tax: 8

Instructor: Various

Member Price: \$215

Business Law Essentials for Practitioners and Controllers

Friday, August 28, 2020

8:30 AM | Gen: 8

Instructor: Trip Barnes

Member Price: \$280

Risk, Cost, and Cash Management for Controllers and Financial Managers

Tuesday, September 22, 2020

8:30 AM | General: 4

Instructor: Curtis Quickel

Member Price: \$160

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

Tuesday, September 22, 2020

1:00 PM | General: 4

Instructor: Curtis Quickel

Member Price: \$160

Lean Accounting and Management: Saving Money by Streamlining Operations

Wednesday, September 23, 2020

8:30 AM | A&A: 4

Instructor: Curtis Quickel

Member Price: \$160

Change the Way You Work: Success as a Virtual CFO

Wednesday, September 23, 2020

1:00 PM | General: 4

Instructor: Curtis Quickel

Member Price: \$160

Health Care Services Conference

Thursday, September 24, 2020

8:30 AM | General: 8

Instructor: Various

Member Price: \$215

Audits of 401(k) Plans

Monday, September 28, 2020

8:30 AM | A&A: 8

Instructor: Bill Felder

Member Price: \$280

Fraud Update: Detecting and Preventing the Top Ten Fraud Schemes

Tuesday, September 29, 2020

8:30 AM | A&A: 8

Instructor: Donna Ingram

Member Price: \$280

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

Wednesday, September 30, 2020

8:30 AM | A&A: 8

Instructor: Donna Ingram

Member Price: \$280

Industry Conference

Thursday, October 22, 2020

8:30 AM | General: 8

Instructor: Various

Member Price: \$180

Business Valuation and Litigation Service Conference

Thursday, November 19, 2020

8:30 AM | General: 8

Instructor: Various

Member Price: \$185

AICPA's Federal Tax Update

Wednesday, December 16, 2020

8:30 AM | Tax: 8

Instructor: Jan Lewis

Member Price: \$280



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