



MSCPA

MISSISSIPPI SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS

VOLUME XLVIII

AUGUST 2015



Past Presidents Attend 2015 MSCPAs Convention

Twenty two MSCPAs Past Presidents gathered for the traditional Saturday morning breakfast during the Annual Convention June 25-28 at the Sandestin Golf & Beach Resort. The event marked the 95th anniversary of the Society and the 30th consecutive convention at Sandestin. Seated from left are Past Presidents Paul Calhoun, Peter Koury, Beth Burgess, Dora Herring, Jan Lewis, Linda Keng, Ken Kennedy, Tommy Lott and Stacy Thomas. Standing from left are Tony Chance, Roy Ward, Clyde Herring, Vance Randall, Bob Cunningham, Jimmy Davis, Sim Mosby, Ed Jones, Paul Breazeale, MSCPAs Executive Director Jack Coppenbarger, David Miller, Chuck Caldwell, Lee Adams, and Gary Walker. For complete photo coverage of the convention click the link on the Society's webpage (www.ms-cpa.org) under the 2015 Convention information. Thanks to Annette Pridgen for outstanding convention photography.

MEMORIAL GIFTS

to the

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In Memory of

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Brandon

Recognize an Outstanding Educator

The MSCPAs Awards, Education & Scholarships Committee is seeking nominations for the Outstanding Educator Award for 2015-2016.

Each year the committee requests nominations for selection of an educator who has made significant contributions as an accounting instructor. That individual is honored during the MSCPAs Annual Business Meeting at Convention in June.

Nominations should be submitted in writing by Oct. 1 to be considered by the committee. Send your nominations to Outstanding Educator, c/o MSCPAs, 306 Southampton Row, Ridgeland, MS 39157 to the attention of Annette Pridgen, Committee Chairman.



Central Chapter Donates \$5,000 To MSCPAs Education Foundation

The MSCPAs Central Chapter presented a \$5,000 contribution to the MSCPAs Education Foundation to benefit the scholarship fund. Presentation was made at the Chapter's July 23 meeting at River Hills Club in Jackson. MSCPAs Chairman of the Board Cheryl Lee, left, received the check from Samantha Moore, who has completed her term as President of Central Chapter.



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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: Noel Addy, William Randolph Hanna, Kaitlin Dennis Monsour, Donna C. Parmegiana, and Jeana Oliver Rich.

Now completing the membership process are:

Scicile Dawn Lindsay was born in Flowood and attended Mississippi State University receiving a BS in Mathematics. She is the President of Lindsay CPA Firm in Kosciusko.

Cheyenne McNeer was born in Pine Bluff, Arkansas and received a Bachelor of Arts in Accounting from Ouachita Baptist University. She is a Staff Accountant with Taylor, Powell, Wilson & Hartford in Greenwood.

Michael Roy Moss was born in Laurel and received a BS in Accounting and a Master of Accountancy degree from the University of Southern Mississippi. He is the Owner of Michael R. Moss CPA PC in Alpharetta, Georgia.

Thanks to the winners...

Thanks to those three MSCPA members who won the auction of Tim Decker paintings at Convention on Saturday night and the benefit you have been to the Education Foundation by your contributions:

Paul Breazeale, Jackson
Marsha Dieckman, Madison
Ted Edwards, Jackson

Photo coverage of the convention and of Tim Decker producing these three paintings is on the Society's website (www.ms-cpa.org) on the main page under the 2015 Convention information.

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Reporting Tools Are Changing by Randy Johnston, Exec VP, K2 Enterprises

Getting the right information out of a system can be difficult and time consuming. Relief may be in sight. Technology vendors are releasing new generation products solving decade old problems. You can be the beneficiary!

Most of us have conceded that to get the reports we need, we have to use the universal reporting tool from Microsoft - Excel. We use Excel as the Swiss Army knife of reporting, choosing to create reports, even when this is not the best, repeatable choice. The tool is inexpensive and many users have at least some command of how to run the product. Excel is certainly flexible and produces attractive graphics when needed. Particularly with Tables, PivotTables and Power BI, the reporting engine has vastly improved over the last 15-20 years. Your state society has CPE courses offered through K2 Enterprises to improve your skill set in Excel to take advantage of these new Excel features.

Reporting relief comes in the form of

other, updated tools as well. From BizNet to Palo Alto LivePlan or Aplos to Xero, we are seeing the systems of today be more meticulous in actionable management information through standard financial reporting and by providing appropriate dashboard and Key Performance Indicators (KPIs) that can be assembled to fit our needs.

So What Are The Most Important New Tools and Programs available?

It is clear, in the profession, that the pace of change is accelerating. Vendors have made significant inroads into collaborative accounting and reporting. Examples here include:

- FreshBooks – invoicing for Schedule C type clients
- SageOne – accounting and project management
- Wave – accounting with inexpensive payroll
- Xero – accounting with payroll and accountant friendly tools
- Accounting Power – an accountant-

- centric system with good payroll
- QuickBooks Online – the major focus of Intuit for accounting
- NetClient CS with ACS and Client Access – Thomson's client accounting system
- CYMA – notable payroll and Human Resources management
- Intacct – mid-market system supporting multiple verticals
- Sage 300 Online – a robust system updated for online use
- Open Systems – a robust system with NFP, construction and other vertical support
- Epicor Online – a strong distribution and manufacturing system

However, accounting, and the reporting within those systems, is only part of the battle. To provide useable information, there are a number of interesting additional tools for planning, reporting, expenses and more. Many of these can be used with QuickBooks or other accounting products or as stand-alone applications. Examples

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REPORTING TOOLS

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here include:

- Palo Alto LivePlan – a budgeting and planning tool
- BizNet Software – an Excel based reporting tool
- BizTools Professional – a multi-dimensional analytics tool
- Tallic – expense reporting with forms recognition
- Avalara – Sales and Use Tax software to support a SALT practice
- Results CRM – Business development integrated to QuickBooks and other products, with project management

If you note the first list above, you'll see a number of applications that are providing browser based Software as a Service (SaaS) accounting with increasing levels of capabilities and complexities. Firms can build a client facing, recurring revenue practice with one or two of these products. The second list adds capabilities that many clients and business owners value and need. These products usually work standalone or with one or more other

systems. For example, making accurate forecasts is a difficult business at best, and clearly, cash flow is a primary reason for business failure. Palo Alto LivePlan provides a budgeting and forecasting tool that can be used effectively with small to medium businesses. Almost no system provides sufficient reporting by itself, and BizNet helps create powerful supplemental reports by automating data connections into Excel and providing accounting functions like prior quarter. Avalara is the leader in Sales and Use Tax and interfaces with more small and mid-sized products than any other offering. Further, the professional filing support is strong. Selecting the right tool(s) from this list can extend and improve your reporting capabilities.

Why Do The New Reporting Tools Make a Difference?

Reporting should be repeatable, convenient, consistent and provide sufficient detail to make informed decisions. Our reporting must provide the information to implement our management strategies. We know we can't believe vendor claims that by using a particular

product, you will have success. However, if you don't have the right program to get the job done, you'll work much harder than needed. Having the right tools and processes enable your firm to measure the results of business performance.

Better Reporting and Monitoring Can Mean Better Results

The right programs can save time, effort and money. However, in your selection process, you should spend enough time at the beginning of the process to understand your needs, what you have today, and the expected improvement. Most of us have concluded we can create almost any report in Excel, but is there a better way? Or, at least, can we automate the process of getting current numbers into Excel? If you have not updated or changed your reporting tools or techniques in the last few years, you could be wasting significant effort. Investigate your options, and consider supporting your changes through CPE courses offered by your state society and K2 Enterprises.

Randy Johnston and his NMGI team provide IT consulting services and recommendations to accountants 24x7, coast to coast. His K2 Enterprises' team provides CPE through State CPA organizations via live classroom delivery, webinars and in-house training.

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Back to Basics: 3 Top Risk Management Areas

by Randy R. Werner, J.D., LL.M./Tax, CPA

The fundamental principles of risk management for CPAs have remained remarkably constant over the years, despite the variety and complexity of changes that continue to take place in regulatory and professional standards for CPAs. This constancy is mainly due to the high expectations the public has for CPAs—expectations that affect the way CPAs are perceived in the world of professional liability, where CPAs are judged by jurors, judges and arbitrators who generally have a limited understanding about what CPAs do in their profession.

Judgments and verdicts rendered in liability disputes then create what are sometimes referred to as jury or claims standards, which have almost always been higher than the standards the profession has established for itself. CPAs who pay proper attention to their professional liability exposures gear their risk management techniques not only to what the profession expects of them, but also to

what the public expects of them.

Most liability problems are preventable, and they often arise when CPAs don't follow basic risk management guidelines. Here are summaries of three main areas of concern:

1. Client screening. CPA firms should re-evaluate relationships with current clients on a regular basis—at least annually. Changes in a client's business may lead the client in a direction that causes the firm to reconsider the relationship, especially if the firm is not interested in or qualified to perform the work. Claims data show that "dabbling" in work that outside of the firm's primary expertise is dangerous.

When the firm changes, its client base may also need to change. The loss of a partner with expertise that other partners don't possess will require a decision by the firm regarding continued service to the former partner's clients.

Consider all client situations carefully

to spot potential conflicts of interest, which may affect the firm's objectivity or independence—even if not engaged to do attestation work. Examine potential or actual conflicts of interest from a broad point of view, considering the client's perspective as well as those of other stakeholders such as owners, investors, partners, beneficiaries and spouses. Troublesome scenarios can include a partnership break-up, a failed investment, bankruptcy, a trust, merger, divorce, or anything else that can create opposing or disappointed factions.

2. Engagement letters/documentation. CPAs must reach an understanding with the client about the engagement, and that understanding should be in writing with an engagement letter. At a minimum, the letter should cover the nature of the work, the limitations of the work, the expectations the CPA has of the client, and the work to be performed by

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BACK TO BASICS

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other professionals.

CPAs should also document the engagement as it evolves and changes, indicating advice given and decisions made. In some engagements, an "informed consent" letter clarifies that the CPA will advise and inform and the client decides. With this letter, it is difficult for claimants to make it appear that the CPA made the decisions.

Firms should have a record retention policy in writing and apply it consistently to all clients. Claims experience shows that good documentation and record retention are crucial components of a firm's defense against a lawsuit.

A stop-work clause that is enforced will prevent unpaid fees from building up to the point where the firm wants to sue for them, or the firm is in financial distress. Such lawsuits tend to lead to the client suing the CPA for malpractice. The resulting legal fees incurred and the billable time lost by the firm almost always exceed the amount

of fees owed to the firm. Alternative dispute resolution clauses, such as a mediation clause for all disputes and an arbitration clause for fee disputes only, are quite helpful in resolving disputes without court intervention.

Document the firm's advice and warnings to clients of their exposures to fraud and how to guard against it. If the firm is comfortable providing such service, offer to help clients address their exposures. It is much more difficult to defend CPAs against claims when advice and warnings to the client about fraud have not been documented.

3. Disengagement. Proper client disengagement procedures should be used in order to avoid causing a loss for the client. When the firm decides to disengage, the relationship should be terminated professionally and formally, in writing. At a minimum, the disengagement letter should always contain:

- a clear statement that the firm is disengaging, and the effective date of the disengagement;

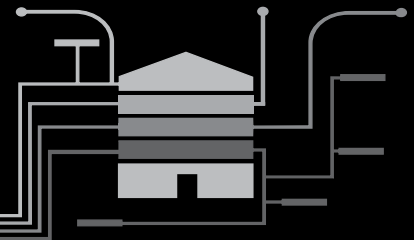
- a description of any work that is in process or unfinished; and
- a statement of any due dates or filing deadlines with regard to the work, whether finished or unfinished.

Often it is essential to provide ample lead time before a client's deadlines to better protect the firm from a claim or from being forced to provide some crucial services before disengaging. A successful disengagement can leave the client believing the firm acted in the best interests of both parties.

Effective communication is a key factor in any CPA-client relationship. When the firm stays informed and in control, it is better protected. In the end, good risk management is good practice management and will help the firm enhance its clientele and avoid liability.

Randy R. Werner, J.D., LL.M./Tax, CPA, is a Loss Prevention Executive with CAMICO (www.camico.com). She responds to CAMICO loss prevention hotline inquiries and speaks to CPA groups on various topics.

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SEPTEMBER 2015 CONTINUING PROFESSIONAL EDUCATION

September 22, 2015

Tuesday

Ridgeland

MSCPA Center

Audits of Banks and Other Financial Institutions

Discussion Leader: James Brown, CPA

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

Course Hours: 8:30-4:30

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

COURSE OBJECTIVES AND DESCRIPTION: This program is dedicated to demonstrating how audit, consulting, and tax associates can learn the accounting, tax, and auditing fundamentals of modern depository and lending institutions, as well as non-bank institutions. The course is complete with practical worksheets and insights such as the applicable metrics that create value for depository and lending institutions. These institutions are specialized and are one of, the most regulated industries in the world. Numerous references to best practice audits allow the auditor and consultants the opportunity to plan efficient and effective audits and reports.

September 23, 2015

Wednesday

Ridgeland

MSCPA Center

Ethics, Rules, and Regulations

Discussion Leader: Dr. James Crockett

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

Course Hours: 8:30-12

LEVEL: All **CPE Credit:** 4 Ethics **VENDOR:** Self-Developed **ACRONYM:** ERR-6

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

September 23, 2015

Wednesday

Ridgeland

NEW

MSCPA Center

What CPAs Should Know about Fraud

Discussion Leader: Dr. James Crockett

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

Course Hours: 1:00-4:30

LEVEL: All **CPE Credit:** 4 A&A **VENDOR:** Self-Developed **ACRONYM:** WSKF

COURSE OBJECTIVES AND DESCRIPTION: This seminar will cover fraud and generally accepted accounting principles, generally accepted audit standards(AICPA) and, government auditing standards(GAS). This will cover the red flags that signal fraud, types of fraud and, auditing for fraud.

September 25, 2015

Friday

Ridgeland

MSCPA Center

Healthcare Services Seminar

Discussion Leader: Panel

Cost: Members: \$210 Non-Members: \$285 AICPA Member Discount: \$0

Course Hours: 8:30-4:30

LEVEL: All **CPE Credit:** 8 General **VENDOR:** Self-Developed **ACRONYM:** HCSS

COURSE OBJECTIVES AND DESCRIPTION: The agenda and registration form are now on the website. www.ms-cpa.org

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

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TOTAL							\$

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