

## Report of the Nominations Committee

The MSCPA Nominations Committee reports the candidates for officers/director for the 2010-2011 year. The election is scheduled for Saturday, June 26, 2010 during the Annual Business Meeting at the Sandestin Golf & Beach Resort, Destin, Florida. Absentee ballots for members who will be unable to attend the Business Meeting will be available later this Spring.

**President:**

Sim Mosby, Natchez

**Vice-President/President-Elect:**

Bill Taylor, Water Valley  
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**Treasurer:**

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Jack Oppie, Pascagoula

**Secretary:**

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Mary Beth Mayer, New Albany

**At-Large Board Member:**

Paul Calhoun, Jackson  
Linda Keng, Jackson

Members of the Nominations Committee include: Jan Lewis, Jackson, Chairman; Ricky Bullock, Tupelo; Tony Chance, Forest; Jeff Warren, Greenwood; and Gary Walker, Jackson.

## IRS Introduces Proposal to Regulate Paid Tax Preparers

The Internal Revenue Service (IRS) recently announced its plans to regulate paid tax return preparers in an effort to improve compliance and enhance ethical conduct. The proposal recommendations, which would be phased in beginning in the 2011 filing season, include mandatory registration of paid tax return preparers as well as competency testing and CPE requirements. CPAs, attorneys and enrolled agents would be exempt from the education and entry-testing requirements.

The proposed IRS requirements were made in response to a recently published six-month study, "Return Preparer Review." The Review states that 80 percent of U.S. households rely on third-party tax preparation services either through return preparers or tax preparation software. It asserts that, while tax attorneys and CPAs are licensed by the states in which they practice, a "large share of tax return preparers do not pass any government or professionally mandated competency requirements before they prepare a federal tax return."

In general, the IRS's proposed

recommendations would require:

- All signing preparers be issued a unique preparer tax identification number (a "PTIN" number)
- All preparers (both signing and non-signing) be subject to Circular 230 ethics rules
- An education requirement be implemented for all signing preparers other than CPAs, attorneys or enrolled agents
- An entry-testing requirement be implemented for all signing preparers other than CPAs, attorneys or enrolled agents

In addition to introducing new requirements for individual tax return preparers, the new IRS proposed recommendations would also impact companies such as H&R Block Inc. and Jackson Hewitt Tax Service Inc, requiring them to comply with the new rules as well.

The IRS plans to conduct a campaign to educate the public about the need to only use regulated tax preparers, and the AICPA will work with the IRS to help it implement the recommendations to meet the public

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## Volunteer for Committee Service

MSCPA members are encouraged to volunteer for committee service and the process is very easy.

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

President-Elect Sim Mosby will make appointments in early Spring and a confirmation will be sent to the committee member with details on your committee meeting during May. Continuing committee members will receive a notice of details on their committee meeting schedule.

## 2010 Convention Set June 24-27 at Sandestin

Registration packets for the 2010 MSCPA Annual Convention will go in the mail in late March and also posted to the Society website. This will be the 25th consecutive year for the Convention and Annual Business Meeting to be held in Destin.

Among speakers confirmed by President Bob Cunningham are AICPA President Barry Melancon and authors Andy Taggart and Jere Nash. Melancon will open the meeting Friday morning with a professional issues update. Taggart and Nash, authors of "Mississippi Politics: The Struggle for Power, 1976-2008, Second Edition" will speak at 11 a.m. on Saturday.

Two four-hour CPE programs will be offered Thursday with Dr. Quinton Booker teaching ethics in the morning and Dr. Stan Clark providing an A&A Update in the afternoon.

The detailed convention program will be posted to the Society's website in February and this Newsletter includes the Sandestin room reservation form (see page 11).



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## OFFICERS

### **President**

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### **Secretary**

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### **Treasurer**

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### **Immediate Past-President**

Jan Lewis, Jackson

### **Executive Director**

Jack O. Coppenbarger

*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 Stephanie Marie Ashley, Michael David Barnes, Frank Joseph Bradshaw, Amelia Graham Cole, Donna Walden McPherson, Nina Lowery Morgan, Ty Necaise, Shelley H. Ray, Quinn Alexander Rigby, and Brian N. Walters.

Now completing the membership process are:

**Roy Lee Austin** was born in Morgan City, Louisiana and received his BS in Business Administration with emphasis in Accounting from Louisiana State University. He is the Director of State & Local Tax with Entergy Services, Inc./Enexus Energy Corp. in Ridgeland.

**Steven Joshua Carlisle** was born in LaGrange, Georgia and received an Associate's Degree from Hinds

Community College and a BS in Business Administration with emphasis in Accounting from Mississippi College. He is a Senior Accountant with Haddox, Reid, Burkes & Calhoun, PLLC in Jackson.

**Halton Arnold Davis, III** was born in Louisville, Mississippi and received an Associate of Arts degree from East Central Community College and a Bachelor of Accountancy and Master's of Accountancy from Mississippi State University. He is a Senior Accountant with Haddox, Reid, Burkes & Calhoun, PLLC in Jackson.

**Justin Kirk Doggett** was born in Meridian and received an Associate of Arts degree from Jones County Community College and a Bachelor of Accountancy from Mississippi State University. He is an Assurance Supervisor with Horne LLP in Ridgeland.

**Karen S. Gondan** was born in Jackson and received a BSBA from the University of Southern Mississippi. She is a Partner with Wm. F. Horne & Co., PLLC in Laurel.

**Jamie M. Hearn** was born in Jackson, received a BSBA from the University of Southern Mississippi and is an Internal Auditor with Stewart Enterprises, Inc., in New Orleans.

**Brien Bennett Hubbard** was born in Mississippi and received a BSBA from Mississippi College. He is an Accountant with Advanced Healthcare Management, Inc., in Oxford.

**Brandon Michael Jones** was born in Idaho and received a Bachelor's degree from the University of Southern Mississippi. He is a Staff Accountant with Palazzo & Company PLLC in Biloxi.

**Frank Nazario** was born at Ft. Bragg, North Carolina and received a BSBA from the University of Southern Mississippi. He is an Audit Senior with Silva, Gurtner & Abney in Mandeville, Louisiana.

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## Corporate Annual Report Fee Change for 2010

The Mississippi Secretary of State's Office is pleased to announce that the fee for filing corporate annual reports online will be reduced from \$25.00 to \$22.00 starting January 4th, 2010.

This reduction in fees only applies to those annual reports filed using the Secretary of State's online filing system. In addition, the Department of Finance Administration has agreed to reduce their on-line filing convenience fee for this transaction from \$2 to \$1.25. This means that corporations can file their 2010 report on-line for only \$23.25 versus \$25 through the mail.

Filing the Annual Report online has significant advantages over paper filing. The Annual Report will be instantly filed and will be available for viewing almost immediately. Customers will receive an electronic confirmation that their report was filed which they can print and keep for their corporate records. Payment may be made using electronic check, Visa, Master Card, or American Express.

Annual Reports may be filed online by going to the Business Services section of the Secretary of State's website at [www.sos.ms.gov](http://www.sos.ms.gov).

**2010 MSCPA  
Annual Convention  
June 24-27, 2010  
Sandestin Golf  
& Beach Resort**

## IRS PROPOSAL

CONTINUED FROM PAGE 1

interest while continuing to place emphasis on CPAs as the premier providers of tax services.

"The AICPA worked closely with the IRS during the public comment period leading up to this proposal and we believe this change will foster greater compliance with the tax code and better, more reliable service for U.S. taxpayers across the board," AICPA President and CEO Barry Melancon, CPA, said. "However, we have concerns about the IRS plan to provide tax preparers who are not already CPAs, enrolled agents or attorneys with a certification based on limited qualifications, through registration and competency testing," Melancon said. "A new IRS examination process may cause confusion among taxpayers about the relative qualifications of tax return preparers."

For information on the AICPA's advocacy efforts regarding the IRS's plan, visit the [AICPA Tax Center](http://AICPATaxCenter.com) and [JournalofAccountancy.com](http://JournalofAccountancy.com).

## WELCOME NEW MEMBERS

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**Amber Leigh Patrick** was born in Flowood and received a BS in Business Administration and a Certificate in Accounting from Mississippi College. She is a Professional with May & Company, LLP in Vicksburg.

**April W. Posey** was born in Clarksdale and received a Bachelor of Accountancy and Master's of Accountancy from the University of Mississippi. She is a Senior Accountant with Watkins, Ward and Stafford in Philadelphia.

**Kimberly Renae Sandifer** was born in Vicksburg and received a BBA in Accounting and MBA from Jackson State University. She is a Senior Auditor with the HUD Office of Inspector General in Jackson.

**Larry Richard Woodruff, Jr.**, was born in Greenville and received a Bachelor of Accountancy and Master of Taxation from the University of Mississippi. He is a Staff Accountant with BKD, LLP in Jackson.

## New MSCPA CAREER CENTER

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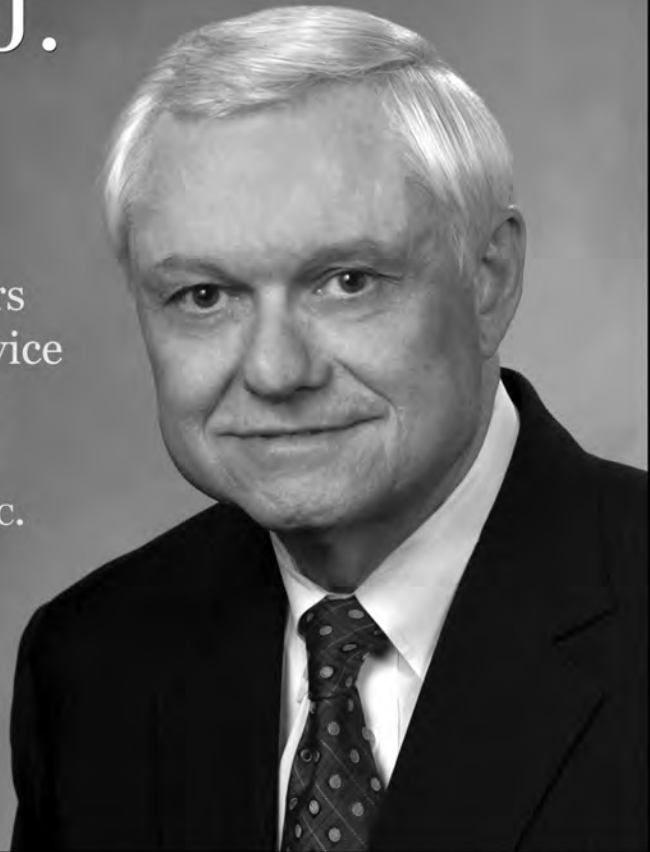
Employers

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## MAJOR EVENTS ON THE 2010 MSCPA CALENDAR

(Dates are tentative for some Fall Conferences)

Mississippi Technology Conference	May 10 & 11
Accounting & Auditing Conference	May 14
Hattiesburg CPE Block in May	May 17-19
Program for Management Development	May 20-21
Summer Cluster - Tupelo	May 24-26
Summer Cluster - Ridgeland	May 28 – June 7
Gulfport CPE Block in June <i>Includes Technology CPE from K2 Enterprises</i>	June 21-23
Annual Convention	June 24-27
Governmental A&A Conference	August 19 & 20
Health Care Services Seminar	September 17
Industry Conference	October 19
Educators Symposium	October 29
Mississippi Tax Institute	November 11 & 12
Business Valuation & Litigation	November 18
Not-for-Profit Conference	November 19

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## ***Honor an Outstanding MSCPA Member For Public Service***

The membership is invited to nominate a member for consideration as the 2010 Public Service Award winner.

The winner will be recognized during the Annual Business Meeting Saturday, June 26, 2010 at the Sandestin Golf & Beach Resort. President Bob Cunningham has named members of the 2010 Public Service Award Committee including: Stacy Thomas, Jackson; Juliette Mays, Houston; and Steven Palazzo, Biloxi.

Qualifying activities for the award include service clubs, church work, children's programs, economic development and public service. Submit a nominee's name to one of the committee members or to the MSCPA office ([mail@ms-cpa.org](mailto:mail@ms-cpa.org)) for forwarding to the committee.

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## Fall Ceremony Honors New CPAs

The Mississippi State Board of Public Accountancy honored new CPAs during their Fall Ceremony Nov. 14 at the New Capitol. MSCPA President Bob Cunningham provided an overview of their professional association and benefits of MSCPA membership. The Honorable Tate Reeves, Mississippi State Treasurer, keynoted the ceremony. State Board Chairman Rick Elam administered the Oath of Title. New CPAs include Frank Joseph Bradshaw, Elaine Chaney Canterbury, Jamie M. Hearn, William Wesley Hill, Brandi Lauren Holley, Jeffery Wayne Horner, Francisco Nazario, III, Donna Michelle Peninger, Mark Edward Prewitt, Karen Allred Ray, Gary Tyler Rosamond, Daniel Hardin Scarbrough, Joshua Jacob Shoemaker, Joshua Larry Simpson, Joseph Scott Speights, Brian N. Walters, Jonathan Mark Ward, Cheryl Christine Wilson, and Larry Richard Woodruff, Jr.

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# The Staff Development Process by Brian Shelton, M.S., Consultant, The Rainmaker Group

Generational discussions about staff productivity, culture and drive have been a hot button topic for a long time. Statements such as "These young people are lazy" or "Back in my day we knew what was expected" are found throughout discussions at conferences and meetings. Each discussion leading to the conclusion that every new generation has a poorer work ethic than the previous one will soon lead us down a road of destruction. Siegfried Engelmann, a developer of the direct instruction approach which took a Houston school from a failing grade to ranking as one of the top schools in Houston, is quoted as saying "if the student is not learning, the teacher is not teaching." This statement removes the stereotypical, subjective, labeling that happens when a person is not doing what they are "supposed to" do. And, it places the responsibility of providing the ability to learn on the teacher. This line of thinking lends itself to staff training and development, putting the emphasis on the processes your firm has in developing the people within your organization. Here are four recommendations for developing a formalized new hire training and staff development process.

## THE NEW HIRE PACKET

Most organizations have a new hire packet giving a new employee important information on policies and procedures. However, very few companies provide a new employee with much more than that; the employee is left to fend for him/herself when it comes to what they are actually supposed to do as a new hire, whom they should meet, or even what exactly the organization does. To help alleviate this issue and bring the new employee up to speed faster, develop a form with the following items to be included in the new hire paperwork:

- *Assign a coach*- this should be their go-to-person for questions and help for the next few weeks. The coach should be someone at the same level or one level higher than the new employee. This strategically places the new hire in direct contact with someone that may have asked the same types of questions when they were hired.
- *Meet key players*- A list of key firm personnel should be provided and the employee will be required to schedule a meeting with each person. The list should include: Managing Partner, HR Director, other Partners, Marketing

Director, direct reports and anyone else that plays a key role in the organizational process. During the meeting each person should tell the new hire what he or she does and how they can be of assistance to the employee. These meetings can be informal like over a lunch or during a break. The point of these meetings is for the new employee to connect with firm personnel.

- *Division/ Niche introduction meetings*- No one can describe what the firm does better than the person in charge of each division or niche. Provide a list of each division and/or niche manager. These may or may not be the same people he/she has already met with; however, the purpose of the meeting is different. Have the employee schedule an hour formal meeting for that person to describe what they do and what it means for the firm. Provide brochures and other reading materials for the new employee to review at a later time and use as a reference.

This process should be priority number one for all new hires and he/she should be given a deadline of no more than two weeks to complete (depending on the

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## STAFF DEVELOPMENT

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number of people he/she will need to meet). This allows them to immediately connect with key personnel as well as develop a better understanding of the firm. Putting them in control of these meetings immediately gives the new employee ownership of his/her career.

### EXPECTATION AND VISION

New employees can easily get swallowed up by the mundane. To prevent this from happening, sit down your new employee and ask him/her, "What do you want to do in the future, both short term and long term?" Allow the employee to describe their vision for the future and use this information to mesh with the firm's overall strategic vision. Does the new employee want to become a manager or partner, open up his/her own firm, or develop/work in a niche? Once you understand a final goal for the employee, use the information, along with the firm's strategic vision, to develop an appropriate career path. This should look like a process map for the employee's career with defined positions. The next step is to define the expectations to be eligible for advancement to each position. These expectations could be technical skills, soft skills, business development training, software mastering,

or anything else to develop that person for the next position.

### INDIVIDUAL STRATEGIC PLANS AND FEEDBACK

Now that you and your new employee have defined expectations and there is a clear path for advancement, it is time for the employee to take ownership for his/her success. An individual strategic plan is an individual development tool that defines the person's goals for the next year. An individual strategic plan should have four to ten goals derived from the defined expectations as well as other tasks important to the development of the person and the firm (e.g. firm committees or special projects). The individual strategic plan should be tied to bi-monthly or quarterly accountability feedback meetings. This allows the employee to know exactly what he/she should be working on and how they are doing on each task within the firm.

### PROVIDE RESOURCES

One of the biggest complaints I hear about younger employees is their lack of basic knowledge in completing the work. I am unqualified to make assumptions on the coursework and teaching in business/accounting programs. However, the solution is relatively easy to set up and maintain. Develop a workflow/white paper that details a self-guided training program using exemplary work for common tasks

within your firm. This can be done using hard copies or online, and should be setup in a similar format having:

- A blank document that will be the finished product (i.e. tax return)
- The same document fully completed and 100% correct
- All of the information to complete the assignment
- A process or outline for completing the product

This will allow the person to quickly learn how to accurately complete work and do it on his/her time. Other resources include excel training courses and e-learning courses.

People are not born knowing what will be expected from them throughout life. Each new change in life offers an opportunity to learn; however, it does not teach the new information. It is your responsibility as a leader in your firm to provide a process for learning. By providing a structured learning process your employees will develop faster, making them more profitable. Providing ongoing expectations and feedback allow each employee to know exactly what's expected and how he/she is doing within the organization. With this structured staff development program, your firm will create a culture of learning and growing your people, as well as improving your firm's success.

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## TENTATIVE SCHEDULE FOR MSCPA's 2010 CPE PROGRAM

?-Feb	Ridgeland	Ethics, Rules and Regulations (date TBA)
22-Feb	Hattiesburg	Ethics, Rules and Regulations
24-Mar	Ridgeland	Ethics, Rules and Regulations for CPAs in Industry
?-April	Oxford	Ethics, Rules and Regulations (date TBA)
10-11-May	Jackson	<b>MISSISSIPPI TECHNOLOGY CONFERENCE</b>
14-May	Jackson	<b>ACCOUNTING &amp; AUDITING CONFERENCE</b>
17-May	Hattiesburg	Audits of 401(k) Plans
17-May	Hattiesburg	Compilation, Review, and Accounting Service Update
17-May	Hattiesburg	Advanced Issues in Compilation, Review and Accounting Services
19-May	Ridgeland	AICPA's Advanced Course: Overview of the AICPA Peer Review Program Standards
20-May	Ridgeland	Upcoming Peer Review: Is Your Firm Ready?
<b>HATTIESBURG CLUSTER</b>		
18-May	Hattiesburg	Write-up, Payroll and Other Accounting Services: Managing the Risks
18-May	Hattiesburg	Identifying and Communicating Internal Control Deficiencies Under SAS 112 & 115
18-May	Hattiesburg	AICPA's Annual Update for Controllers
19-May	Hattiesburg	Accounting and Auditing Update
19-May	Hattiesburg	Beyond Financial Accounting: Budgeting and Costing Techniques for Maximum Profitability
19-May	Hattiesburg	Analyzing Your Company's Financial Statement
19-May	Hattiesburg	Ethics, Rules and Regulations
20-21-May	Ridgeland	<b>PROGRAM FOR MANAGEMENT DEVELOPMENT</b>
24-May	Ridgeland	Advanced Update for Compilation and Review Engagements
25-May	Ridgeland	Construction Contractors: Accounting, Auditing and Tax
26-May	Ridgeland	Internal Control Deficiencies: Assessment and Reporting Under SASs 112 & 115
27-May	Ridgeland	Audit Workpapers: Documenting and Reviewing Field Work
<b>TUPELO CLUSTER – May 24, 25 &amp; 26</b>		
24-May	Tupelo	Advanced Issues in Compilation, Review and Accounting Services
24-May	Tupelo	Forensic Accounting: Uncovering Schemes and Scams
24-May	Tupelo	Leadership Essentials for the CPA - Adapted from Football's Leading Coaches
25-May	Tupelo	Estate Planning Strategies: Minimizing Taxes and Maximizing Wealth
25-May	Tupelo	S Corporations: Strategies from Formation to Termination
25-May	Tupelo	ABC's of Cost Accounting for Improved Performance
26-May	Tupelo	Audits of 401(k) Plans
26-May	Tupelo	Accounting and Auditing Update
26-May	Tupelo	Ethics, Rules and Regulations
<b>RIDGELAND CLUSTER – May 28 – June 7</b>		
28-May	Ridgeland	Analytical Procedures: Practical Guidance for Small Business Engagements
28-May	Ridgeland	Forensic Accounting: Uncovering Schemes and Scams
1-Jun	Ridgeland	Solving the Choice of Entity Riddle: Key Tax and Business Implications
1-Jun	Ridgeland	S Corporations: Strategies from Formation to Termination
2-Jun	Ridgeland	The CPA's Role in Buying or Selling a Business
2-Jun	Ridgeland	Practical Tax Tips and Techniques for Closely-Held Businesses
3-Jun	Ridgeland	Financial Forecasting: Planning for Success
3-Jun	Ridgeland	Controller's Update: Latest Trends for Today's Financial Manager
4-Jun	Ridgeland	Financial Management: Tools and Techniques to Enhance Profitability
4-Jun	Ridgeland	Decision-Making Tips, Tools and Techniques for Today's Financial Environment
7-Jun	Ridgeland	Accounting and Auditing Update
7-Jun	Ridgeland	Ethics, Rules and Regulations
8-9-Jun	Ridgeland	AICPA's Accounting and Auditing Workshop
9-Jun	Ridgeland	Excel Macro's
9-Jun	Ridgeland	Pivot Tables - Part 2
10-Jun	Ridgeland	PDF Documents: What Accountants Need to Know
10-Jun	Ridgeland	Comparing and Contrasting the Tax Aspects of S Corporations, Partnerships, C Corporations, Sole Proprietorships, and Limited Liability Companies
11-Jun	Ridgeland	Excel Financial Reporting and Analysis
11-Jun	Ridgeland	Surgent McCoy's Comprehensive Guide to Tax Depreciation, Amortization and Property Transactions from Acquisition to Exchange or Disposition
14-Jun	Ridgeland	AICPA's Annual Business Law Update
15-Jun	Ridgeland	Governmental and Non-Profit Annual Update
16-Jun	Ridgeland	The Revised YellowBook: Government Auditing Standards
17-Jun	Ridgeland	Studies on Single Audit and Yellow Book Deficiencies
18-Jun	Ridgeland	Not-for-profit Accounting & Reporting: From Start to Finish
21-Jun	Ridgeland	Closely Held Business Taxation: 49 Practical Ways to Cut Taxes
21-Jun	Ridgeland	Ethics, Rules and Regulations
22-Jun	Ridgeland	Delving into the Top Twelve Issues for Partnerships, LLCs and S Corps
22-Jun	Ridgeland	Form 990: AICPA's Answer to Unlocking the Tax Complexities



**GULFPORT**

21-Jun	Gulfport	Excel Financial Reporting and Analysis
21-Jun	Gulfport	Determining How Much Money You Need to Retire, and Tax Ideas and Money Management in Retirement
22-Jun	Gulfport	Technology for CPAs: Don't Get Left Behind
22-Jun	Gulfport	MBA In a Day
23-Jun	Gulfport	Accounting and Auditing Update (Morning)
23-Jun	Gulfport	Moving to Office 2007 / 2010: A Roadmap for Success (Morning)
23-Jun	Gulfport	Ethics, Rules and Regulations (Afternoon)
23-Jun	Ridgeland	Frequent Frauds Found in Governments and Not-for-Profits
23-Jun	Ridgeland	Income Taxation of Estates and Trusts
28-Jun	Ridgeland	Identifying Fraudulent Financial Transactions
28-Jun	Ridgeland	Driving Corporate Performance: The CFO's Role in Developing Competitive Advantage
29-Jun	Ridgeland	FASB Review and Update: Common GAAP Issues Impacting All CPAs
29-Jun	Ridgeland	Corporate Finance Tune-up: Putting the Right Skills in Your Analytical Toolbox
30-Jun	Ridgeland	Internal Control Essentials for Financial Managers, Accountants and Auditors
30-Jun	Ridgeland	Change Management: Making Improvement Happen
30-Jun	Ridgeland	Leadership Skills for the CFO: From Value Preserver to Value Creator
3-Aug	Tupelo	QuickBooks: Reconciling and Analyzing Financial Statements
3-Aug	Tupelo	QuickBooks Advanced Financial and Operational Reporting
4-Aug	Tupelo	Technology for CPAs: Don't Get Left Behind
19-20-Aug	Jackson	<b>GOVERNMENTAL A&amp;A CONFERENCE</b>
17-Sep	Jackson	<b>HEALTHCARE SERVICES SEMINAR</b>
23-Sep	Ridgeland	Introduction to Bank Accounting and Auditing
24-Sep	Ridgeland	Community Banking Update
27-Sep	Ridgeland	The Coming IFRS Conversion: Preparing for the Ultimate GAAP Makeover
28-Sep	Ridgeland	The Experienced CFO: Skills for Strategic Success
19-Oct	Ridgeland	<b>INDUSTRY CONFERENCE</b>
21-Oct	Gulfport	Advanced Update for Compilation, Review and Accounting Services
21-Oct	Gulfport	Income Taxation of Estates and Trusts
22-Oct	Gulfport	Federal Tax Update
22-Oct	Gulfport	Frequent Frauds Found in Governments (afternoon)
27-28-Oct	Ridgeland	OIL & GAS WORKSHOP - Details to follow
29-Oct	Ridgeland	<b>EDUCATORS SYMPOSIUM</b>
1-2-Nov	Ridgeland	Corporate Income Tax Workshop
11-12-Nov	Jackson	<b>MISSISSIPPI TAX INSTITUTE</b>
15-Nov	Tupelo	Form 990: AICPA's Answer to Unlocking the Tax Complexities
15-Nov	Tupelo	IRA'S Roth IRAs, SIMPLEs and SEPs: Contributions: Rollovers, Distributions, and More
16-Nov	Tupelo	Federal Tax Update
16-Nov	Tupelo	Advanced Update for Compilation and Review Engagements
18-Nov	Ridgeland	<b>BUSINESS VALUATION AND LITIGATION SUPPORT SERVICES</b>
19-Nov	Jackson	<b>NOT-FOR-PROFIT CONFERENCE</b>
1-Dec	Ridgeland	Understanding & Documenting The Entity & Its Environment -Including Internal Controls in Smaller Entities
2-Dec	Ridgeland	Everything You Need to Know About Auditor's Reports
6-7-Dec	Ridgeland	Individual Income Tax Workshop
9-Dec	Hattiesburg	Governmental and Non-Profit Annual Update
9-Dec	Hattiesburg	Tips and Traps for Dealing with the IRS
10-Dec	Hattiesburg	AICPA's Federal Tax Update
10-Dec	Hattiesburg	Advanced FASB Review and Update: Tackling the Tougher GAAP Issues
14-Dec	Ridgeland	Federal Tax Update

The **2010 CPE Catalog** will be distributed within a couple of months. It will contain all of the details: *who, what, when, where, and how much*. Other seminars will be added during the year depending on need – including “Ethics, Rules, and Regulations”. (*June 30, 2010, is the deadline for the second cycle of reporting.*) Notices will be posted on [www.ms-cpa.org](http://www.ms-cpa.org) and in blast emails. Separate brochures will be in future newsletters detailing courses and speakers for this year's conferences and clusters. This information will also be available on our web site. If you have questions or need assistance with your CPE schedule, please call us: 601-856-4244 or (in-state) at 800-772-1099.

**ARE YOU AND OTHERS IN YOUR FIRM TAKING ALL THE CPE DISCOUNTS YOU ARE ENTITLED TO?**

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### MISSISSIPPI SOCIETY OF CPAS 90TH ANNIVERSARY MEETING

**Wednesday, June 23 - Sunday, June 27, 2010**

**GROUP CODE: 2242NC**

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

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

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

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

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BEACHSIDE 1 BDRM	\$344.00	BAYSIDE INN - GUEST ROOM - RV	\$153.00
BEACHSIDE 2 BDRM	\$483.00	BAYSIDE INN - GUEST ROOM - BV	\$163.00
BEACHSIDE 3 BDRM	\$693.00	NORTHSIDE 2 BDRM	\$239.00
WESTWINDS 1 BDRM	\$393.00	VILLAGE STUDIO	\$189.00
WESTWINDS 2 BDRM	\$508.00	VILLAGE 1 BDRM	\$259.00
WESTWINDS 3 BDRM	\$728.00	VILLAGE 2 BDRM	\$331.00
TIVOLI 2 BDRM	\$299.00	VILLAGE 3 BDRM	\$415.00
TIVOLI/PINE RIDGE 3 BDRM	\$399.00	GRAND SANDESTIN STUDIO	\$199.00
TIVOLI 3 BDRM LOFT	\$482.00	GRAND SANDESTIN 1 BDRM	\$249.00
DOCKSIDE 2 BDRM	\$279.00	GRAND SANDESTIN 2 BDRM	\$339.00
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# What's New in Windows 7 by Randy Johnston

Microsoft has successfully created a broad number of products that support our businesses. Two of the most important are the Windows Operating System and Microsoft Office. The latest iterations of these tools in Windows 7 and Office 2010 are important to the future of your firm in 2010 and beyond. The technologies work well enough that you should plan to leave older versions of Windows and Microsoft Office behind on your next purchase or upgrade. This article will give background information on requirements and features that Windows 7 includes that are important from an accountant's perspective.

## KEY STRATEGIES TO UNDERSTAND

We have been recommending running Windows Vista in 64 bit mode to allow access to more than 3GB of RAM. Larger RAM spaces allow for virtualization and large Microsoft Office models. Windows 7 64 bit has performed flawlessly during both the beta period and after release of the product.

## WINDOWS 7

Windows has been upgraded by Microsoft to add notable features in Version 7. Among the most useful features in this release:

- 1) An improved taskbar - This feature not only allows you to launch applications, but to preview running applications through the Aero interface.
- 2) Documents Library - This capability

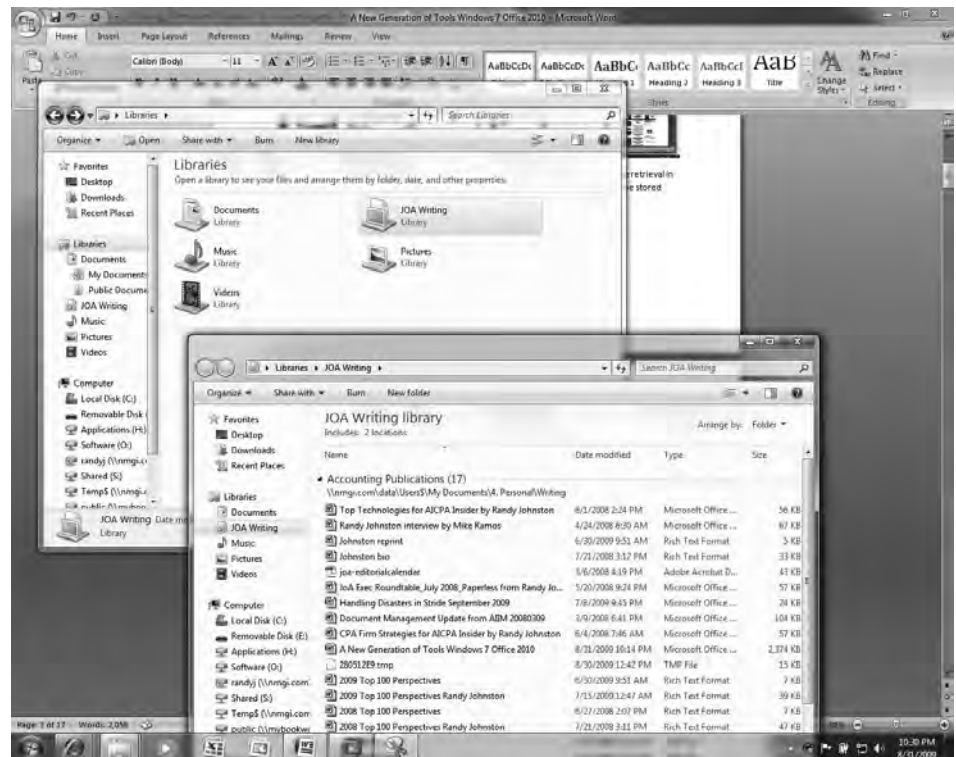


### Aero interface on the improved taskbar

allows filing of a document once, while allowing retrieval in multiple views. For example, permanent files related to clients or project data can be stored once and retrieved in all projects with a simple filter. Folders, file types and other attributes can be used as filters.

3) Action Center - All maintenance items are reported in the system tray in one interface, as a simple flag. If an action is required, you can open the action center to resolve issues like updating your anti-virus, dealing with User Account Control settings, Windows Update, and other applications that help your system run properly.

4) Notification area - instead of having from a few to dozens of icons in the system



### Documents Library

tray, applications are summarized in one icon. The items that can be displayed are customizable.

5) Windows XP Virtual Mode - On Professional, Enterprise and Ultimate editions of Windows 7, an additional license of Windows XP is granted for you to

run older, incompatible applications in a virtual machine. The installation process of Virtual Mode and Windows XP is about a 10-

15 minute process. Windows XP applications that won't run under Vista or Windows 7 happily function in Windows XP mode.

6) Installation and distribution - updating individual desktops and laptops is greatly enhanced with the automated installation tools provided by Microsoft. My own organization was able to deploy Windows, Office and all of our other applications in a single image. The whole process takes less than an hour per machine, and technicians can often handle three or more machines during manual installation resulting in a manual installation average of 15-20 minutes per machine.

7) Location-Aware Printing - Windows detects whether the user is at work or at home and automatically sends the documents to the right printer. This is supported by new network location identifiers and a special feature called HomeGroup.

8) Jump Lists - Jump Lists are recently opened documents or common tasks by application. A single list for each application is available from the Start Menu and from the Taskbar. You right-click on any Taskbar button to see the Jump List associated with that application. Documents can be removed or pinned to the list. This seems to work with any application that has files associated with the application. The screen clip shows this working with VMware, Password Depot, Remote Desktop Connections, and Virtual Mode Windows XP. It works very well in Microsoft Office 2007 or 2010, too.

9) Better Performance - Windows 7 starts and stops faster by starting and stopping services in parallel rather than serially. Windows 7 also trims unnecessary services, has better memory management, and requires less hardware resources. Windows 7 has about a 5GB footprint compared to Vista's 11GB footprint. This entire document was written in Word 2010, and memory usage in Windows 7 never exceeded 3.9GB with all applications open.

continued on page 13

## NEW IN WINDOWS 7

CONTINUED FROM PAGE 12

10) Better Compatibility - If it runs on Vista, it will run on Windows 7. Microsoft has tested Windows 7 on 1200 core applications vs. 900 with Vista. Microsoft says some applications that never ran on Vista will run on Windows 7. Since Windows 7 uses the same hardware driver model as Vista, there is no need for new hardware drivers.

11) Better Interface - Windows 7 overcomes Vista's style over substance by providing a cleaner, simpler GUI. Windows 7 makes better use of Aero capabilities with less glitz and a more subdued presentation that requires less hardware resources.

### SO WHAT ARE THE VERSIONS AND SYSTEM REQUIREMENTS?

Windows 7 comes in 6 versions: Starter, Home Basic, Home Premium, Professional, Enterprise and Ultimate. Windows XP virtual mode is only available on Professional, Enterprise and Ultimate editions, immediately making these three versions better choices for most accountants who need to run older versions of software. BitLocker hard drive encryption is the key differential feature between the Professional and Enterprise editions. Consider using dual or more processors, and 4-8GB of RAM to properly support this operating system, the probable virtualization you will need and your applications.

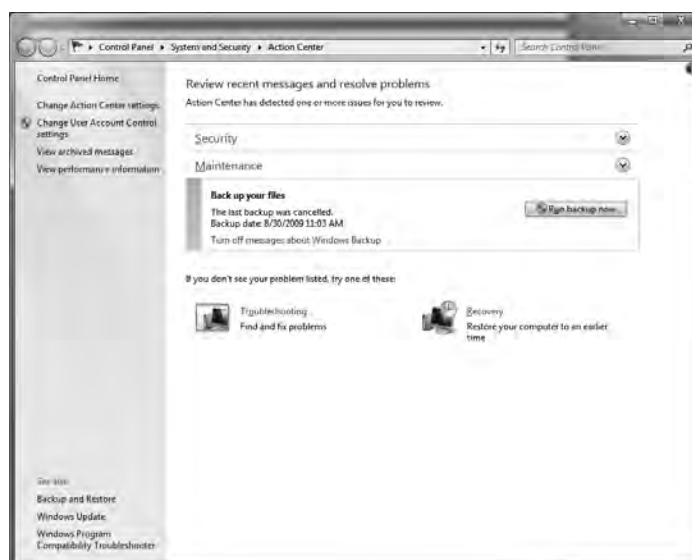
Wikipedia has a comprehensive comparison chart at: [http://en.wikipedia.org/wiki/Windows\\_7\\_editions](http://en.wikipedia.org/wiki/Windows_7_editions)

Microsoft has a similar chart at: <http://www.microsoft.com/windows/windows-vista/compare-editions/default.aspx>.

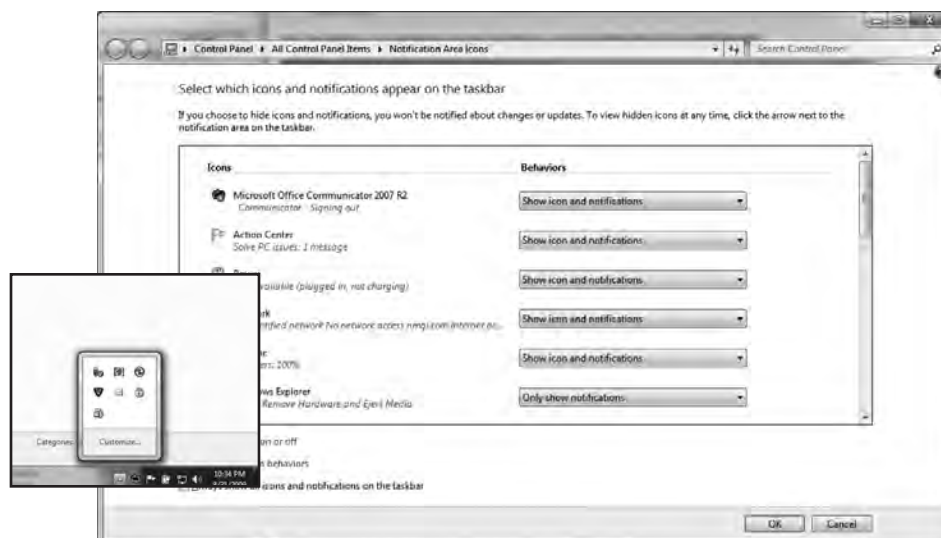
### A GOOD UPGRADE

Although we frequently recommend staying current on versions of software because of incompatibilities with hardware and software, Windows 7 will make your Windows experience better and allow for work to be completed more quickly. The learning curve is small if you are currently running Vista. The time to learn will be longer if you are on Windows XP or before. You should schedule training time just to focus on the interface and usability issues to minimize your learning curve on the new products.

Your cost of ownership should drop with easier deployment, easier learning, and intuitive tools. The time of waiting to purchase new hardware while waiting for new Microsoft technology to arrive is past.



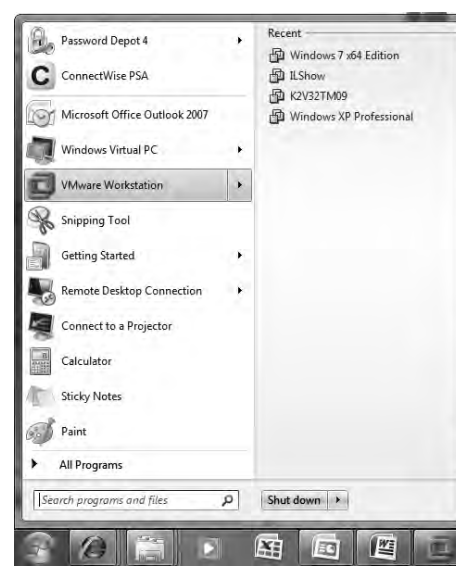
Action Center



Notification Area (Inset: System Tray)



Windows XP Virtual Mode



Jump Lists

Randy Johnston is a nationally recognized educator, consultant, and writer with over 30 years experience in Strategic Technology Planning, Systems and Network Integration, Accounting Software Selection, Business Development and Management, Disaster Recovery and Contingency Planning, and Process Engineering.

# ***Emotional Intelligence is Critical to Personal and Firm Success***

As businesses seek to turn information into knowledge, CPAs will assume more advisory roles by combining traditional services with consulting services. Accountants must have the sales and presentation skills not traditionally used in the profession. They must be able to explain financial data in non-financial terms and offer clear and concise recommendations that lead to business results<sup>1</sup>.

One of the biggest paradigm shifts in 21st century management is the unmistakable need to develop non-technical competencies in both current and future leaders. Study after study has shown it is the non-technical skills that distinguish star performers in every field, from entry-level to top executive positions. Even in the accounting profession, it is now commonly accepted that simply being technically excellent is not enough to successfully lead a firm, service line, niche area or department. In order to thrive, today's accountant must also develop a strong foundation of "non-technical" skills in addition to being highly trained in the technical competencies of their trade.

Non-technical skills such as personal, interpersonal, managerial and organizational capabilities play a key role in making or breaking a firm's success as clients are demanding more accountability and seeking "the right fit" both technically and personally. Firms that adopt a learning culture that supports both technical and non-technical competencies are able to

fully develop their most important asset – their people – and confront the challenges of the profession confidently.

Perhaps one of the greatest recent discoveries connecting non-technical skills development to overall firm profitability is the concept of Emotional Intelligence. Since 1990, Peter Salovey and John D. Mayer have been the leading researchers on emotional intelligence. In their influential article "Emotional Intelligence," they defined emotional intelligence as, "the subset of social intelligence that involves the ability to monitor one's own and others' feelings and emotions, to discriminate among them and to use this information to guide one's thinking and actions" (1990)<sup>2</sup>.

Today's professionals are being evaluated by their employers not just by how smart they are, or by technical training and experience, but also by how they handle themselves and each other. Emotional Intelligence refers to the ability, capacity, skill or even self-perceived ability to identify, assess and manage the emotions of one's self, of others and of groups<sup>3</sup>.

Emotional Intelligence is a way of recognizing, understanding, and choosing how we think, feel, and act. It shapes our interactions with others and our understanding of ourselves. It defines how and what we learn; it allows us to set priorities; it determines the majority of our daily actions. Research suggests it is responsible for as much as 80% of the "success" in our lives<sup>4</sup>.

Emotional Intelligence skills can be further developed and nurtured within an individual, while in contrast, a person's IQ cannot be changed<sup>5</sup>. Furthermore, a recent study found that firms which successfully develop Emotional Intelligence skills among their current and future partners (i.e. the kinds of competencies developed through non-technical training) enjoy 390% more incremental profit when benchmarked against an average firm. In addition, a study of 15 global companies showed seven skills differentiated the "stars" from average executives – six out of those seven skills were emotional or non-technical<sup>6</sup>.

Finally, it is critical to understand that emotional intelligence is not the opposite of technical knowledge, it is not the triumph of heart over head — it is the unique intersection of both<sup>7</sup>. It is not nature versus nurture, but a combination of the two. One is a constant while the other is learned behavior. What type of "smart skills" training are you providing for your staff? As the most-trusted business advisor, we know you're technically proficient; but what is your level of emotional intelligence?

*Jeffrey Pawlow is the CEO and Managing Shareholder of The Growth Partnership, Inc. and The Partner Institute™. The Partner Institute™ is a two-year, multi-disciplinary program for accountants. The curriculum and coaching are designed to build a participant's personal, interpersonal, managerial and organizational skills.*

<sup>1</sup> Robert Half International Study

<sup>2</sup> Kendra Van Wagner; *What Is Emotional Intelligence?*

<sup>3</sup> Wikipedia

<sup>4</sup> Freedman et al.; *Handle With Care: Emotional Intelligence Activity Book*

<sup>5</sup> Daniel Goleman, Annie McKee and Richard E. Boyatzis; *Primal Leadership: Realizing the Power of Emotional Intelligence*

<sup>6</sup> Mary C. Werner, CPA, MOD; *Emotional Intelligence: Discover the (Not-So) Secret Weapon for Accounting Firm Success*

<sup>7</sup> David Caruso; *Emotional What?*



## Our Members in the News

**Joseph E. Hines**, CPA, CFFA was an invited speaker at the October, 2009 Joint Seminar of the Mississippi Claims Association and the Mississippi Defense Lawyers Association. Joey's presentation, *"Business Interruption Claims – Beyond the Basics"* was delivered to over 100 claims adjusters and attorneys in attendance at the annual seminar. Joey is a partner with Tann, Brown & Russ Co., PLLC, of Jackson, where he serves as manager of the firm's litigation and forensic accounting services practice.



The American Institute of Certified Public Accountants has named **Jim Koerber**, CPA/ABV, CVA, CFE, CFF as a Certified in Financial Forensics Champion. Koerber is a shareholder in The Koerber Company, PA, which provides valuation and litigation services for attorneys, CPAs and clients.



**Charla Rowley**, CPA, has been admitted as partner with Horne LLP. Rowley works in Horne's Ridgeland office where she provides a variety of services to health care clients including assurance, reimbursement consulting and other general advisory services. Rowley joined Horne in 2001 with previous experience as a chief financial officer in the health care industry. She is a graduate of the University of Southern Mississippi where she received her Bachelor of Science in business administration and her Master of Professional Accountancy.

## MSCPA Launches New Online Career Center

The MSCPA has launched an interactive job board, the **MSCPA Career Center**. The center offers an easy-to-use and highly targeted resource for online employment connections. A link is on the Society's website.

Both members and non-members can use the **MSCPA Career Center** to reach qualified candidates. Employers can post jobs online, search for qualified candidates based on specific job criteria, and create an online resume agent to email qualified candidates daily. An added benefit is online reporting that provides job activity statistics.

For job seekers, **MSCPA Career Center** is a free service that provides access to employers and jobs. In addition to posting their resumes, job seekers can browse and view available jobs based on their criteria and save those jobs for later review if they choose. Job seekers can also create a search agent to provide email notifications of jobs that match their criteria.

## JAN/FEB CLASSIFIEDS

CONTINUED FROM PAGE 16

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### **Position Title Staff Accountant Company Entergy/Enexus**

Location: Jackson, MS; Position Category: Accounting; Experience Required: 2-5 years; Education Required: Bachelors Degree;

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