



2019 Annual Convention

June 20-23, 2019 | Sandestin Golf and Beach Resort

Registration is Open!

MSCPA's Annual Convention has been the avenue to promote fellowship among the members. The Officers and Board of Governors welcome members, their families and guests and invite you to enjoy a program planned with entertainment for the whole family. To our new members, we especially invite you to join us and be part of the convention.

Visit our Convention webpage www.ms-cpa.org/education/annual-convention to register online or see page 7 for a printable registration form.

Register for Convention by May 1, 2019 to Enter to Win FREE Registration!

Early registrations helps the Society plan for this event more accurately. Even with rising meeting costs we continue to strive to



hold a quality family oriented convention without passing the costs to our members. Please register early! You could win FREE Convention Registration!

1. How to Enter: Complete your 2019 Convention registration by May 1, 2019 to be automatically entered. (Spouse/Guest Registrations are not eligible.)

2. Grand Prize: General Registration fees will be refunded the same way they were

IN MEMORIAM

ROBERT DAY PARKER

Madison

Died January 6, 2019

MEMORIAL GIFT

to the
EDUCATION FOUNDATION
in memory of

FRANK HENRY HAGAMAN, JR.

Jackson

by

Emmitte Haddox

Jackson

by

Hugh Parker

Ridgeland

paid (credit card or check made payable to original payer). The winner will be selected in a random drawing.

3. General Rules: The winner will initially be notified via phone and/or email. Prize is nontransferable and no substitutions are allowed.

Make Your Room Reservations Now!

This year will mark the 34th consecutive
continued on page 6

New CPAs Honored Nov. 10 at State Board Ceremony



The Mississippi State Board of Public Accountancy honored new CPAs during their fall CPA License Presentation Ceremony November 10 at the Mississippi State Capitol. MSCPA Chairman of the Board Annette Herrin provided an introduction to the Society and MSCPA Young CPA Network President Lydia Windham urged the new CPAs to become active in Society activities. Keynote speaker was MSCPA member Commissioner Sam Britton. State Board Chair Mark Peach administered the Oath of Title.

The new CPAs include Chun Chen, Joseph Hunter Coleman, Nancy Francis Davis, Jessica Arender Engle, Amanda E. Gunderson, Mary Melissa Hazlewood, Jennifer Lynn Herrington, Jon Austin McCormick, Christopher Brett Nadalich, Jenna Leigh Oakley, Jennifer Lynette Owen, Ty Vonna Parsha Peterson, Hayden Micah Putnam, Clayton Brandon Southerland, and Michael Lee Walker.



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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

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KSB, Inc.
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Oxford

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Barksdale Management
Ridgeland

SHAROLYN SMITH

Jackson

MSCPA Honors Hamp King Award Winner



Marshal Salley of Delta State University was honored at the MSCPA Tax Institute December 6 for his selection as the Hamp King Award scholarship winner. Salley was presented a \$1,000 scholarship check from the Mississippi Tax Institute and a plaque from the MSCPA Education Foundation. One scholarship winner from among all MSCPA scholarship recipients is selected each fall based on outstanding academic and collegiate leadership. The award was named to honor the long-time service of the late Hamp King as Mississippi's State Auditor. Pictured with Salley are MSCPA Tax Institute trustees Barry Jones, Tom Byrne, and William B. (Billy Buck) Stagers.

Northeast Chapter Donates \$20,000 to MSCPA Education Foundation



The MSCPA Northeast Chapter presented a \$20,000 contribution to the MSCPA Education Foundation to benefit the scholarship fund. Presentation was made at the December 7 Board of Governors meeting. MSCPA Chairman Annette Herrin, right, received the check from Chase Farmer, left, MSCPA Northeast Chapter President and Board Representative.

Honor an MSCPA Member for Public Service

The membership is invited to nominate a member for consideration for the MSCPA 2019 Public Service Award. The winner will be recognized during the 2019 Annual Convention awards presentation on Saturday, June 22, 2019 at Sandestin Golf and Beach Resort in Destin.

Qualifying activities for the award include MSCPA membership and professional and civic public service achievements. Nominations should be submitted by April 19, 2019. Submit a nomination letter by email to Karen Moody (kmoody@ms-cpa.org) for consideration by the MSCPA Public Service Award Committee. Members serving on the committee this year include Leslie Wood (Chair), Columbus; Brian Wyman, Tupelo; and Sharon Maloney, Jackson.

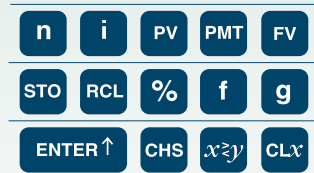


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Member News

Britton and Clarke Announce Candidacies in Statewide Elections

MSCPA members Sam Britton and Eugene “Buck” Clarke have announced their candidacies for public office in the GOP primary in the 2019 statewide elections.

Secretary of State



Sam Britton was elected Public Service Commissioner for Mississippi’s Southern District in 2015. He grew up in Waynesboro and resides in Laurel. Britton graduated from Jones County

Community College before attending the University of Southern Mississippi where he completed a business degree. After college, Britton worked in the pipeline construction business “digging ditches” as a welder and on drilling rigs before returning to USM to complete a degree in accounting and subsequently attaining his CPA license.

After working with the offices of the State Auditor and the State Tax Commission, Britton began his own accounting firm. He holds certifications in areas including Accredited in Business Valuation, Certified Valuation Analyst, Certification in Financial Forensics, Personal Financial Specialist, CGMA, and was recognized by the *Mississippi Business Journal* in 2014 as a “Mississippi

Leader in Finance.”

Britton currently serves as Treasurer of the Southeastern Association of Regulatory Utility Commissioners and is a member of Organization of MISO States. He is also a member of National Association of Regulatory Utility Commissioners and serves on the Committee on Electricity and the Finance Committee.

At present, Senator Michael Watson of Pascagoula has also announced his GOP candidacy for Secretary of State. Outgoing Secretary of State Delbert Hosemann is a candidate for Lieutenant Governor.

Treasurer



Eugene “Buck” Clarke was first elected to the Mississippi Senate in 2003 and has served as Chairman of the powerful Senate Appropriations Committee since 2012. In this

role he has been a key architect in the state’s budget. Senator Clarke represents District 22, which includes Bolivar, Humphreys, Madison, Sharkey, Washington and Yazoo Counties. Senator Clarke also is a member of several other committees, including Accountability Efficiency Transparency, Agriculture, Education, Insurance, Judiciary,

Legislative Budget and Medicaid.

Senator Clarke was born at Greenville Air Force Base and received his accounting degree at Mississippi State University. He is celebrating his 40th year practicing public accounting as partner at Bridgers Goodman Aldridge Baird & Clarke PLLC, formerly Clarke Bradley Baker and Company, in Hollandale. The Clarkes are a MSCPA legacy family as his father, Eugene, served as Chairman of the Board 1975-76, and his brother David is a CPA. Senator Clarke has been a friend of the MSCPA in the Legislature and is the only CPA currently serving.

He has also served on the Washington County Republican Executive Committee and the Washington County Board of Education. Senator Clarke is also active in Rotary.

David McRae, a Madison County attorney, has also announced a campaign for Treasurer. McRae lost to current Treasurer Lynn Fitch in the 2015 Republican primary. Fitch has announced her candidacy for Attorney General.

The deadline for statewide candidates to qualify is March 1, 2019. Statewide primaries will be held on August 6, and the general election will be held on November 5.

Cecil Brown, CPA, has announced that he will not seek reelection as Central District Public Service Commissioner after serving one term. Previously Brown served in the Mississippi House of Representatives for 16 years.

Retire Now – Not Later!

Do you have a successful accounting practice? Are you ready to sell your firm? Retire? We are interested in discussing options with you.

Contact Charles Lindsay at Matthews, Cutrer & Lindsay, P.A.

at 601-898-8875 or email clindsay@mclcpa.net.



CERTIFIED PUBLIC ACCOUNTANTS

HADDOX REID Introduces New Managing Partner



Haddox Reid, CPAs & Advisors is pleased to announce as of January 1, 2019, M. Gregory King, CPA, was selected by the firm's management committee and fellow partners

to the position of managing partner. Greg succeeds Paul Calhoun, CPA, who served with distinction in that capacity since 2007.

As managing partner, Greg will oversee the firm's operations. "I look forward to serving as the firm's new managing partner," said Greg. "I am excited to help continue the firm's commitment to client service, professional excellence and the continued

strengthening of our client relationships while providing development and guidance to our staff in their career paths."

"We are grateful to Paul for his many years of leadership," added Greg. "He has played a key role in taking our firm to its position as a leader in the community and in our profession."

Paul will continue to provide audit/accounting, consulting and tax services to our clients.

About Greg King, CPA

As a member in the firm, Greg has provided both tax and assurance services for over forty years. His experience is serving a wide range of commercial, nonprofit and governmental clients which includes audit, tax and business advisory services with privately held companies in the retail, wholesale, professional services,

manufacturing and processing, and healthcare industries. In addition, Greg serves several larger governmental and nonprofit clients that are subject to a variety of governmental audit regulations and provides expert testimony in various litigation support engagements. As a member of the Mississippi Society of Certified Public Accountants, Greg has served as a Board member and is also a past president of the Central Chapter. He is a member of the American Institute of Certified Public Accountants and the Petroleum Accounting Society of Mississippi. He is a graduate of Mississippi State University with a Bachelor of Science in Accounting. He is a Paul Harris Fellow having served as president of the Rankin County Rotary Club. Greg has been very active over the years in various youth soccer, baseball, and basketball programs with his children and grandchildren.

HADDOX REID Announces the Admission of Two New Partners to the Firm

Haddox Reid, CPAs & Advisors is pleased to announce that Katie Hoggatt, CPA, and Charles R. Byram, CPA are now Partners with the firm.

"Haddox Reid seeks to recognize the dedication of our team members. Both Katie and Charles have consistently excelled in terms of client service, contribution to the firm's growth, investment in our people and providing expert technical knowledge. We are very pleased to welcome them as partners and look forward to the future," said M. Gregory King, CPA, firm Managing Partner.

About Katie Hoggatt, CPA



Katie's clients include partnerships, LLCs, non-profits, corporations, and individual clients. She specializes in income tax planning and compliance services for high

net worth individuals, rental real estate entities, and closely-owned businesses. She particularly specializes in tax compliance for non-profit organizations, including community support organizations, education assistance organizations, and independent private schools. In addition, Katie manages accounting services including payroll,

bookkeeping and financial statements for various clients. In 2016, Katie was recognized as a Top Ten Finalist in Mississippi Business Journal's Top 50 under 40 award for business leaders in Mississippi. Katie is a member of the American Institute of Certified Public Accountants. She is a member of the Mississippi Society of Certified Public Accountants where she has previously served on the Non-Profit Committee. She is also a member of the Central Chapter where she has previously served as Secretary. Katie is a member of the Accounting & Financial Women's Alliance, Jackson chapter, and has previously served as President, Vice-President, and Education officer of the organization. Katie is a graduate of Mississippi College with a Master of Business Administration and a BSBA in Accounting. Katie is a member of Broadmoor Baptist Church in Madison, MS. In her spare time, she is a fastpitch softball instructor to girls from all over Mississippi. Katie also volunteers for the Red Kettle Campaign with the Salvation Army each year, and serves at Stewpot Community Services and We Will Go Ministries throughout the year. Katie and her husband Philip have two sons, Jackson and Tyler, and reside in Madison, Mississippi.

About Charles R. Byram, CPA

Charles joined Haddox Reid in 2008 as a Senior Manager in the tax department after 15 years with an international accounting



firm and 5 years in industry. His areas of focus include providing tax compliance and consulting services to corporate, pass-through, not-for-profit and individual clients, as well

as representing clients before the Internal Revenue Service and various state tax authorities. He has extensive experience advising clients with acquisition planning and transaction structuring, multi-state operations and general tax research. Charles is a member of the American Institute of Certified Public Accountants, the Mississippi Society of Certified Public Accountants and the Central Chapter. Charles has served on the Board of Governors and as an officer in the Central Chapter. Charles graduated from University of Southern Mississippi with a Bachelor of Science in Business Administration - School of Professional Accountancy. Charles volunteers annually for the Red Kettle Campaign with the Salvation Army and Stewpot Community Service. He has resided in Madison for over 20 years, and has two daughters and a grandson.



CONVENTION

continued from page 1

year for the Annual Convention and Business Meeting to be held at Sandestin Golf and Beach Resort in Destin, Florida. Sandestin's Baytowne Conference Center will be the meeting venue for the convention, located just steps from the activities and attractions of the Village of Baytowne Wharf.

MSCPA has reserved a block of rooms at the Resort and asks that you book your accommodations directly with Sandestin using our group code 23V0AZ. By booking in our room block, you will help us meet our contractual obligations with Sandestin and earn comp nights for our staff and speakers.

Sandestin has room rates starting at \$176. Weekly rates are also available. Your cut-off date for reservations is May 20, after which rooms will be sold on a space-available basis.

You can book your accommodations online or via phone 800-320-8155.

Convention Parking Changes Due to Construction

Sandestin announced in 2018 that they will build a new 250-room hotel and conference center which will be located adjacent to the Baytowne Conference

Center where our Convention activities are held. Construction of the new Sandestin Hotel is underway with completion projected for April 2020. This new construction will affect parking for our 2019 Convention.

For 2019, we highly recommend that you consider booking units in the Grand Complex or Village early for ease of convenience, as these units are in walking distance to the Baytowne Conference Center.

If you choose accommodations away from the conference center, please plan to use the dedicated and resort transportation services while on property. We are already making plans to have dedicated transportation for the group for the Thursday and Saturday receptions. For Friday and Saturday mornings, we will make plans to elevate the start of tram service for guests to be able to catch them from their accommodations to the Baytowne Conference Center.



MSCPA 2019 Annual Convention Registration

June 20-23, 2019 | Sandestin Golf and Beach Resort | Destin, FL

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

PRIMARY CONVENTION REGISTRATION:

Name _____ Member ID # _____

Company _____

Address _____

Phone _____ Email _____

_____ ***MEMBER FIRST TIME ATTENDEE General Registration** **\$175**
Includes welcome reception, three breakfasts, two speaker presentations, Friday box lunch, Saturday beach party/volleyball tournament, reception, banquet and special entertainment.

_____ **General Registration** **\$295**
Includes welcome reception, three breakfasts, two speaker presentations (approved for 2 CPE credits), Friday box lunch, Saturday beach party/volleyball tournament, reception, banquet and special entertainment.

_____ **Spouse/Guest Registration** **\$160**
Includes welcome reception, three breakfasts, Friday morning cooking demonstration, Friday box lunch, Saturday bingo with prizes, beach party/volleyball tournament, reception, banquet and special entertainment.

Spouse/Guest Name _____ **SUBTOTAL**
\$ _____

CPE SEMINARS *Lunch included*

_____ **Thursday, 8:30 AM – Noon | CPE Credit: 4 A&A** **\$155**
Hot Topics in A&A: Preparing for Imminent Change, Wilkins M. Crawford, CPA

_____ **Thursday, 1:00 PM – 4:30 PM | CPE Credit: 4 Ethics** **\$155**
Ethics, Rules, and Regulations, Donna M. Ingram, CPA, CFE, CRFA

_____ **SUBTOTAL**
\$ _____

ACTIVITIES *Spouses, guests and children welcomed! Cash prizes will be awarded!*

_____ **Golf Tournament | Friday, June 21, 2019** **\$80 per person**
Includes green fee, cart fee, tournament registration and refreshments. Reservation must be received by May 31, 2019 to guarantee availability. Tee time is offered on a space available basis after cutoff date.

Player(s) and Handicap(s): _____

_____ **Deep Sea Fishing | Friday, June 21, 2019** **\$50 per person**
Includes fishing license, bait, tackle, fish cleaning and refreshments on board the Destiny. Advance registration recommended. This trip usually sells out!

Participant(s): _____

_____ **Tennis Tournament | Friday, June 21, 2019** **\$40 per person**
Includes court time, tennis balls, and refreshments. Matches will be assigned by organizer.

Player(s) and USTA Rating(s) if applicable: _____

CHILDREN'S EVENTS (ages 4-12 years old) **FREE**

Thursday Evening: arts, crafts, games and snacks.

_____ *Number of children attending*

Friday Morning: lawn and pool party with tie dye shirt craft and games.

_____ *Number of children attending*

Saturday Evening: carnival with games, arts, crafts, magic show, balloon animals, face painting, and dinner.

_____ *Number of children attending*

_____ **SUBTOTAL**

\$ _____

TOTAL AMOUNT DUE \$ _____

TO REGISTER

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

CHECK CARD USING FOR PAYMENT	
<input type="checkbox"/> VISA	<input type="checkbox"/> MASTERCARD
<input type="checkbox"/> AM EXP	<input type="checkbox"/> DISCOVER
CARD NUMBER	CVV
AMOUNT	EXP. DATE
SIGNATURE	

Cancellations thru June 18, 2019 accepted without penalty. Cancellations/no-shows on the date of the event forfeit the entire registration fee. No refunds or transfer of fees will be made after the date of the event.



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HOUSING REQUEST FORM

Book online: <http://www.Sandestin.com/23V0AZ.aspx>
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 Call 800.320.8115 or Fax: 850.267.8221

MISSISSIPPI SOCIETY OF CPAS 2018 ANNUAL MEETING

Wednesday, June 19-Sunday, June 23, 2019

GROUP CODE: 23V0AZ

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

Your cut-off date for reservations is Monday, May 20, 2019, after which rooms will be sold on a space-available basis.

ACCOMMODATIONS AND RATES

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

All room rates quoted **DO NOT** include 12% fees and 11% taxes.

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

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

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

<u>Accommodation</u>	<u>Daily Rate</u>	<u>Weekly Rate</u>	<u>Accommodation</u>	<u>Daily Rate</u>	<u>Weekly Rate</u>
Beachside Studio*	\$309.00	\$1,947.00	Lakeside 2 Bdrm	\$299.00	\$1,884.00
Beachside 1 Bdrm*	\$364.00	\$2,293.00	Lakeside 3 Bdrm	\$389.00	\$2,451.00
Beachside 2 Bdrm*	\$500.00	\$3,150.00	Bayside 2 Bdrm	\$269.00	\$1,695.00
Beachside 3 Bdrm*	\$624.00	\$3,931.00	Village Studio	\$215.00	\$1,355.00
Westwinds 1 Bdrm*	\$377.00	\$2,375.00	Village 1 Bdrm	\$237.00	\$1,493.00
Westwinds 2 Bdrm*	\$527.00	\$3,320.00	Village 2 Bdrm	\$349.00	\$2,199.00
Westwinds 3 Bdrm*	\$642.00	\$4,044.00	Village 3 Bdrm	\$440.00	\$2,772.00
Southside 2 Bdrm	\$332.00	\$2,092.00	Grand Complex Studio	\$227.00	\$1,430.00
Southside 3 Bdrm	\$430.00	\$2,709.00	Grand Complex 1 Bdrm	\$249.00	\$1,569.00
Beachwalk 2 Bdrm	\$308.00	\$1,940.00	Grand Complex 2 Bdrm	\$359.00	\$2,262.00
Beachwalk 3 Bdrm	\$402.00	\$2,533.00	Grand Complex 3 Bdrm	\$465.00	\$2,930.00
Luau 1 Bdrm	\$232.00	\$1,462.00	Bayside at Sandestin-Guest Room	\$176.00	\$1,109.00
Luau 2 Bdrm*	\$337.00	\$2,123.00	Bayside at Sandestin-1 Bedroom	\$220.00	\$1,386.00
Luau 3 Bdrm*	\$420.00	\$2,646.00			

*A 5-night minimum is required on Beachfront accommodations; and a 4-night minimum is required on Luau 2 and 3 bedroom units.

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

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

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

BOOK ONLINE AT www.Sandestin.com and enter group code 23V0AZ

Sandestin.
Golf and Beach Resort

MSCPA Advocacy Efforts Take Top Billing During Current Legislative Session

Promoting the value and integrity of the accounting profession and protecting your license from harmful legislation are MSCPA top priorities during the 2019 Mississippi Legislative session which began on January 8th and will conclude on April 7.

Advocacy efforts kicked off in December with our lobbyist, Stephen Clay of the Clay Firm, attending the December 7th Board of Governors meeting to discuss expectations and concerns in the 2019 session and to preview the 2019 statewide elections. On December 19, the MSCPA Legislative

Committee met at our Ridgeland office for lunch. Invited guests included Clay, Executive Director of the Mississippi State Board of Public Accountancy Andy Wright, Louisiana Society of CPAs Executive Director Ron Gitz, and Conner Reeves and Jamie Grantham with Medical Marijuana 2020. Occupational licensing and de-regulation of state boards are top concerns. Gitz discussed de-regulation bills that emerged during Louisiana's 2018 legislative session and the efforts of the Louisiana Society and the AICPA to protect the

profession. Reeves and Grantham gave an overview of the push by their organization for a medical marijuana ballot initiative. Conner stated that many CPA state boards have issued opinions that it is not unethical to offer accounting/advisory services to businesses in the medical marijuana industry even though the sale of marijuana is illegal from a federal perspective.

The Legislative Committee, chaired by Linda Keng and Matt Bailey (millennial chair), along with the AICPA, are currently monitoring bills affecting the profession and working with Stephen Clay and Karen Moody to identify the impact and any actions needed. There were 94 bills on our watch list originally, but many of those died in committee and never made it to the floor for vote. However, several bills are in fact directed at occupational licensing and regulation of state boards and remain active at press time. Criminal justice reform has emerged and includes prohibiting licensing boards from disqualifying someone for criminal convictions. Medical marijuana bills were introduced but were among the bills that died. Links to all Legislative bills can be found on the MSCPA website Advocacy page.

In addition to Legislative monitoring, other advocacy efforts include attending State Board meetings and regularly meeting with agencies such as Mississippi Department of Revenue, Internal Revenue Service, and Secretary of State. Members are encouraged to submit topics and problems for consideration. MSCPA provides information to and educates federal, state and local policymakers regarding key issues.

The MSCPA PAC is a non-partisan committee comprised of CPAs who uphold the political voice of the CPA profession. By combining financial resources, the PAC is able to leverage its impact for positive results. The MSCPA PAC pools members' contributions and contributes funds to friendly state legislators and candidates who support CPA and business interests and encourages and supports our own CPAs as political candidates. The PAC will meet in May to determine which candidates to support in the 2019 statewide elections.

Nominate an MSCPA Member for Rising Star Award

The MSCPA Rising Star Award recognizes an outstanding young CPA in Mississippi who has demonstrated exemplary leadership skills and involvement in the MSCPA, the accounting profession and their communities.

Recipients must be age 40 or younger, a current or past member of the Young CPA Network and a MSCPA member who has demonstrated a commitment to the profession by leadership in the Network and MSCPA activities such as committees, local chapters or the Board.

Nominations should be submitted by April 19, 2019. Please send nominations addressing the requirements in the criteria to Karen Moody (kmoody@ms-cpa.org). A copy of the nominee's business resume can be included if available.

The Executive Committee will select the recipient who will be recognized during the 2019 Annual Convention awards presentation on Saturday, June 22, 2019 at Sandestin Golf and Beach Resort in Destin.



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Taxation Committee and MDOR Hold Annual Liaison Meeting

Members of the MSCPA Taxation Committee and President/CEO Karen Moody met with representatives from the Mississippi Department of Revenue on January 23, 2019, in Clinton for our annual liaison meeting. This was an opportunity to hear updates and new programs from MDOR and to address questions, concerns and suggestions from CPAs.

Jan Craig, Associate Commissioner for Income and Property Taxes, updated the Committee on the official start of tax season, e-filing and personnel roles within MDOR. She introduced staff responsible for Taxpayer Assist. Meg Bartlett, Associate Commissioner for Business Taxes and ABC, discussed sales tax, changes and collection efforts. Commissioner Herb Frierson also spoke on challenges with budget cuts and impacts on staffing and employee retention.

Highlights from MDOR included:

- Ongoing project to review and update all Rules and Regulations.
- Opportunity to receive alerts on proposed changes and notifications of public hearings by emailing sam.portera@dor.ms.gov to be added to the Listserv. The public is invited but you must let MDOR know if you want to speak at a hearing or

can submit notes in writing if you cannot attend.

- New Offers in Compromise Program—all requests must go through MDOR evaluation and approval, as well as, the Governor's office.
- New business seminars to be held in various locations around the state.
- Project with Secretary of State's office to include annual report with business return filings for 2020.
- Document to address Federal and MS differences relating to TCJA to be posted on MDOR website.
- Refunds to begin February 11.
- Follow MDOR on Facebook, Twitter and their app.

The Department was receptive to the Committee's issues that included feedback on experience with auditors, e-filing challenges, PDF attachments to returns, and suggestions on new forms. Several specific e-filing issues were addressed with suggestions for resolution by working with software vendors. Taxation Committee Chairman Donna Bruce also had the opportunity to discuss cases submitted by members with Jan Craig in confidence prior to the open meeting.

The afternoon concluded with a tour of the processing and title departments and the call center.



The Smart Way to Bundle Charitable Giving

A fund at the Community Foundation for Mississippi can help your clients achieve both their tax planning and charitable giving goals for 2018. We work with CPAs and other professionals to create easy and elegant solutions suited to each individual client.

www.formississippi.org | 601.974.6044, ext. 222.   

4 Practice Management Trends You Should Consider

Is your firm operating at peak efficiency? You have the opportunity to leverage insights around certain practice management approaches that could help you become more effective and profitable. Recently, the American Institute of CPAs' Private Companies Practice Section (PCPS), in collaboration with CPA.com, invited firms of all sizes across the country to participate in the [National Management of an Accounting Practice \(MAP\) Survey](#). More than 1,900 firms responded to the survey, and the findings revealed some important practice management trends you should be aware of. Consider the following:

1. Engaging clients outside the hourly billing box

More and more firms are strengthening client relationships by shifting the conversation from time spent on services to

the value of those services. Value pricing/value billing and fixed pricing allow the opportunity for you to potentially expand service offerings and become an even greater [trusted adviser](#) to your clients. These billing models might help minimize stress on your staff members while also promoting a healthy work/life balance.

According to the MAP Survey's results on value pricing/value billing and fixed pricing:

- There were big increases in the number of firms of all sizes using these models, with smaller firms leading the way.
- Firms with less than \$200,000 in revenues increased their use of these billing models by 10%.
- Firms with \$200,000 to \$750,000 in revenues more than doubled their use of value pricing and value billing from

the 2016 survey.

- Most firms had increased their use of fixed pricing.

2. Your cyber risk potential – regardless of your firm's size

Some smaller organizations believe the risk doesn't apply to them, when in reality, 61% of [data breaches](#) happen at small businesses. That's an important message for your small business clients. You can help your clients be prepared to handle a cyberattack and assess your cyber risk with these [resources](#). And if your firm is a member of PCPS, check out this [toolkit](#), which explores cybersecurity client opportunities.

Accounting firms are not immune from cyber risks, and the MAP Survey found a growing number of firms are insuring

[continued on page 13](#)



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PRACTICE TOOLS

continued from page 12

against cyber liability risk:

- Among firms with under \$200,000 in revenues, 60% now have insurance, compared with 41% just two years ago.
- In firms with \$200,000 to \$500,000 in revenues, 67% were insured, up from 53% in 2016.
- For firms with \$500,000 to \$750,000 in revenues, the percentage went up to 70% from just 47% in 2016.

3. Investing in time-saving technology

CPAs who aren't regularly upgrading and enhancing their technology assets

should give it serious consideration as the benefits for productivity and profitability are immeasurable. Firms are investing more and more in technology. And to remain competitive, you've got to keep up with this pace.

4. Diversifying services to keep up with your competition

Traditional services may be a firm's bread and butter, but many firms also are making solid inroads into client advisory services. More than half of firms in almost every size category are providing some form of these services. If you don't already have a foot in the water, now's the time to dive in and distinguish your services from your competition.

The good news: Firms continue to enjoy solid growth

According to the MAP Survey, most firms have increased net client fees — up 4.2% across all firms since the last survey results in 2016. Given the continuing demand for CPA services, there's even more incentive to make sure your practice is working at peak efficiency and you're maximizing opportunities. Benchmarks are an important way to assess your firm's inner workings, set priorities and establish goals. Make sure you're considering these practice management trends from the MAP Survey, and you'll be on the road to optimal success.

2019 CONFERENCE DATES ANNOUNCED

YOUNG CPA CONFERENCE

April 26, 2019
MSCPA Training Center - Ridgeland

CHANGES IN BUSINESS & INDUSTRY: PROGRAM FOR MANAGEMENT DEVELOPMENT

May 14-15, 2019
MSCPA Training Center - Ridgeland

ACCOUNTING & AUDITING CONFERENCE*

May 16, 2019
MSCPA Training Center - Ridgeland

TECHNOLOGY CONFERENCE

May 20-21, 2019
Embassy Suites - Ridgeland

GOVERNMENTAL ACCOUNTING & AUDITING CONFERENCE

August 15-16, 2019
Hilton - Jackson

BANKING & FINANCE CONFERENCE

August 22, 2019
Hilton - Jackson

AGRICULTURAL AND FARM ACTIVITIES CONFERENCE*

August 30, 2019
MSCPA Training Center
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HEALTH CARE SERVICES CONFERENCE*

September 27, 2019
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INDUSTRY CONFERENCE*

October 18, 2019
MSCPA Training Center - Ridgeland

ACCOUNTING EDUCATION CONFERENCE

October 25, 2019
MSCPA Training Center - Ridgeland

NOT-FOR-PROFIT CONFERENCE

November 7, 2019
Hilton - Jackson

BUSINESS VALUATION & LITIGATION SERVICES CONFERENCE*

November 14, 2019
MSCPA Training Center - Ridgeland

MISSISSIPPI TAX INSTITUTE

December 5, 2019
Hilton - Jackson



Taxpayers Need More Penalty Relief Says AICPA in Letter to IRS

When the Tax Cuts and Jobs Act (TCJA) was passed in late 2017, it affected millions of individual taxpayers and tax preparers. As part of its implementation, the IRS adjusted its withholding tables. However, the adjusted withholding tables did not account for factors such as the elimination of personal and dependency exemptions or reduced itemized deductions. The result: many taxpayers have been unable to accurately calculate their tax liability for 2018 and may have inadvertently under-withheld their taxes.

"Thankfully, the IRS saw the challenges that taxpayers could have with the new withholding tables and provided them with underpayment penalty relief. It stated that it would waive the underpayment penalty for individuals who paid, by January 15, 2019, at least 85 percent of the tax due for the current year," said Karen Moody, MSCPA President/CEO.

Karen added, MSCPA and the AICPA

welcome this change but believe more should be done. We are hearing from many members that they and their clients are very concerned about the ongoing uncertainty around implementation of the TCJA."

Recently, the AICPA sent a letter to the Department of Treasury and the IRS urging them to provide more extensive relief to taxpayers. The letter cites five recommendations that would benefit taxpayers:

- Taxpayers should receive relief from underpayment penalties if they paid at least 80 percent of the tax due for the current year or they paid 80 percent (100 percent if their adjusted gross income (AGI) exceeds \$150,000) of amount of tax shown on their U.S. income tax return for the prior year.
- Taxpayers should also receive relief from late payment penalties if they make a timely request for an extension of time to file their income tax return and pay at

least 80 percent of the taxes owed with the request.

- The IRS should establish an expedited process to grant individuals' payment penalty relief for reasonable cause due to the considerable uncertainty surrounding the TCJA.
- Taxpayers need the IRS to identify specific circumstances for which providing automatic relief of penalties for the 2018 taxable year is appropriate, thus relieving them of the administrative burden of requesting a waiver of penalties.
- The IRS should also provide businesses and tax-exempt organizations relief from underpayment and late payment penalties.

To stay on top of developments and the profession's advocacy efforts, visit the AICPA's Tax Reform Resource Center at www.aicpa.org/taxreform.



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The New Direction in Nonprofit Reporting

By Charles Lindsay, CPA

As 2019 arrives so do the first major changes to nonprofit financial reporting requirements in the last quarter of a century. Ensure your clients are prepared.

The Financial Accounting Standards Board August 2016 Accounting Standards Update (ASU) 2016-14, Not-for-Profit Entities (Topic 958): Presentation of Financial Statements of Not-for-Profit Entities, is effective for annual financial statements issued for fiscal years beginning after Dec. 15, 2017. To provide better information to donors, grant makers, creditors and others who read nonprofit financial statements, FASB intends for the changes to improve their usefulness. These new rules apply to all nonprofits having an audit, review or issuing statements in accordance with Generally Accepted Accounting Principles.

Net Assets

One of the biggest changes is the simplification of net assets. The net asset section should disclose the existence or absence of donor-imposed restrictions. The new standards throw out the confusing classifications of permanently restricted, temporarily restricted and unrestricted net assets, which can be especially confusing to someone without a nonprofit background. The new format moves from three classes of net assets to two – one “with restrictions” and one “without restrictions.” This presentation will be more meaningful and transparent. In addition to these classification changes, there is a requirement to add a disclosure on the financial statement or in the notes for any board-designated funds.

A significant addition is a requirement to provide both quantitative and qualitative information about the liquidity of the Organization. A required footnote disclosure details how the organization manages its liquid resources available to meet general expenditures within one year of the balance sheet date. This liquidity disclosure reveals how the nonprofit expects to fund the expenses that normally arise in its operating cycle. The disclosure informs the reader about cash reserves, lines of

credit, and other sources of cash available for routine bill payment. The disclosure also highlights funds that are not available to meet liquidity needs. In addition to describing its cash management plans, Organizations must quantify these plans calculating the net financial assets available to meet cash needs for general expenditures within one year.

Liquidity

The new pronouncement shines the spotlight on nonprofits with liquidity issues. Many nonprofits will need CPA assistance with this disclosure. For the first time ever, audit reports may show that some Organizations will not be liquid within one year. Give consideration to liquidity well in advance of the audit and discuss this new requirement now. It is not too early to look at this disclosure, prepare the calculation, and identify some steps that should/could be taken before year-end. Many nonprofits do not have a cash management plan, which is now called for in this disclosure. The purpose of this new disclosure is to better inform the reader about the Organization's ability to pay its bills, so now is the opportune time to examine the Organization's ability to pay its bills without interruption of service delivery. The qualitative aspect of this new disclosure can be a place for the Organization to brag about its financial story and give readers increased confidence in the Organization's financial position. Without prior preparation, some clients may be surprised at the true picture in the audit report. Plan ahead and fend off fear.

Investment Income

The new standard removes some leeway in reporting investment income and expenses and requires that investment income be reported net of related investment expenses allowing for consistent treatment among all nonprofits. This standard alleviates some of the difficulties often encountered during the audit to identify embedded investment fees.

Cash Flow Statement

The cash flow statement may be

presented on either the direct or indirect method. Furthermore, the new standard eliminates the requirement to disclose the indirect method in the notes if the direct method is presented on the statement of cash flows. Possibly, a slight reduction in audit report prep time may be seen.

Functional Expense Reporting

Finally, the new FASB standard requires all nonprofits to show expenses by both function (i.e. program, management/general and fundraising) and natural classification (i.e. advertising, rent, salaries, etc.) with some analysis in a singular location. This recognition can be presented -

- On a separate statement
- On the face of the financial statement of activities
- In the footnotes

For many nonprofits already providing a statement of functional expenses with their financial statements and reporting this information to the IRS on Form 990, there will be no change. A great deal of conversation exists about reporting the core mission support in the financial statements. More nonprofits may begin disclosure of the funds spent specifically on the core mission in the financial statements.

Act Now

As trusted advisors, CPAs must now step up to educate clients about the new standards, gently nudge for their implementation, and prepare clients for the possible added scrutiny from grantors with the new liquidity disclosure. One way to begin is to discuss the FASB changes with the Organization staff and board of directors before the audit begins.



Charles R. Lindsay is a Certified Public Accountant and a Shareholder in Matthews, Cutrer & Lindsay, P.A. in Ridgeland. He is also Co-Chairman of the MSCPA Not-For-Profit Committee. Contact him at (601) 898-8875 or

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Featuring Speaker, Joseph Rugger



Joseph Rugger, CPA, CGMA, currently serves as the Account Manager for DentistMetrics in Little Rock, Arkansas. He has been a discussion leader for the Arkansas Society of CPAs and the AICPA and has been a guest speaker at numerous organizations talking on the topic of personal finance, time management, negotiations & body language. Joseph serves as a past chair of the Emerging CPAs Committee

for the State of Arkansas. He has also served as Secretary for the Board of Directors for the Arkansas Society of CPAs. Joseph was named the 2011 Outstanding Emerging CPA by the Arkansas Society of CPAs. He has been a member of the AICPA's EDGE Experience & Young Member Initiatives Committee. Joseph is a 2013 graduate of the AICPA's Leadership Academy. He speaks on industry and personal development topics throughout the Midwest and Southern United States teaching Continuing Education for the AICPA. He is passionate about helping CPAs become better CPAs.

Conference Topics:

- The Great Generational Debate: How Millennials and their Managers Agree and Disagree
- Time Management Secrets of Billionaires
- A Bankruptcy Primer for Accountants and Auditors
- Update from the Mississippi Department of Revenue
- Update from the Mississippi Office of the State Auditor
- Excel Tips & Tricks
- Ready, Set, Let's Fail! Leadership Lessons in Failure
- Courageous Leadership: Adding Accountability to Organizations

See www.ms-cpa.org for complete agenda and to register online

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YCPA Network Bylaws Updated

The Young CPA Network has grown significantly since its inception. This growth is a result of the leadership, involvement, and support by MSCPA and the Network's founders. With the approval of the MSCPA Board of Governors, the Young CPA Network's bylaws were updated to increase board member term limits and document current practices, leaving room for future growth of the Network.



Allison Garner, YCPA Network Immediate Past-President; Karen Moody, MSCPA President/CEO; and Lydia Windham, YCPA Network President at the Board of Governors and Past Chairmen's Christmas Reception on December 7 at the Westin Jackson.

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CHAPTERS

Northwest Chapter

The Northwest Chapter met December 11 at Chancellor's House in Oxford for their chapter meeting and half-day CPE event with Mark Puckett and Gray Edmondson presenting.

Northwest Chapter Officers: Allison Garner, President; Tom Steeno, Vice President; Catherine McLeod, Treasurer; and Amanda Knight, Secretary.



Central Chapter

The Central Chapter met December 13 at the MSCPA Training Center in Ridgeland for their quarterly luncheon and CPE with Secretary Delbert Hosemann and State Auditor Shad White presenting.

Central Chapter Officers: Chelsey Henley, President; Blair Jussely, Vice President-Programs; Philando Brown, Vice President-Membership; Shawn Gillenwater, Treasurer; and Katelyn Sanchez, Secretary.





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Conferences

Mississippi Tax Institute

The MSCPA Annual Mississippi Tax Institute was held on December 6 at the Hilton-Jackson with nearly 150 professionals in attendance. Speakers included Farhad Aghdami, David Aughtry, Meg Bartlett, Jan Craig, John Fletcher, Jetson Hollingsworth, Stewart Hood, Rhonda Kirby, Damien Martin, Mark Parthemer, Beth Sims, and Aileen Thomas.

Exhibitors were Accelerated Cost Recovery Solutions, Brown & Brown Association Services Professionals, CPACharge, Mississippi Federal Credit Union, Paychex and Thomson Reuters.

Taxation Committee Chairperson, Donna Bruce; Millennial Chair, Samantha Moore





Winter Events

Mississippi State Board of Public Accountancy CPA License Presentation Ceremony

MSCPA Chairman Annette Herrin, MSCPA Young CPA Network President Lydia Windham, and MSCPA Member Commissioner Sam Britton were speakers at the Mississippi State Board of Public Accountancy CPA License Presentation Ceremony November 10.



Chun Chen of R. Dale Pierce, CPA receives her CPA license from R. Dale Pierce, Partner.



Lydia Windham, MSCPA Young CPA Network President; Charles Prince, MSCPA Past-Chairman and MSBPA Board Member; Annette Herrin, MSCPA Chairman; Karen Moody, MSCPA President/CEO; Sam Britton, MSCPA Member and keynote speaker; and Andy Wright, MSCPA Member and MSBPA Executive Director.



Jennifer Lynn Herrington of PriorityOne Bank receives her CPA license from Charles Prince.



Ty Vonna Parsha Peterson of TMH receives her CPA license from Bill Kelly, Partner.



Hayden Micah Putnam of HORNE LLP receives his CPA license from March Peach, MSBPA Chairman.



New members of the MSCPA pictured with Annette Herrin, MSCPA Chairman and Lydia Windham, MSCPA Young CPA Network President.



CPA legacy Christopher Brett Nadalich of BKD, LLP, with mother Sharon Nadalich, CPA of Pruet Production Co.

Board of Governors and Past Chairmen's Christmas Event

MSCPA Chairman, Annette Herrin and her husband Anthony, hosted the annual Board of Governors and Past Chairmen's Christmas reception and dinner December 7 at the Westin Jackson with over twenty Past Chairmen in attendance.





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team members from entry level to managerial roles who want to be a part of building a world class accounting operation. If this type of opportunity fits your career aspirations we'd like to get to know you. Please contact us at talentacquisition@elior-na.com.

CLOUD ACCOUNTANT – CPA in Ocean Springs MS has an opening for a Cloud Accountant, who will be responsible for keeping our clients' financial records up to date. The cloud accountant will research and present accounting, business, management applications, and business processes to internal and external clients. The role requires someone who is a natural with learning new technology and can efficiently and accurately manage multiple clients. Having these skills is a real plus:

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