

2020 Annual Convention and Centennial Celebration

June 24-28, 2020 • Sandestin Golf and Beach Resort

**Register by May 1 to Enter to
Win FREE Registration!**

Make plans now to attend our 2020 Annual Convention as the MSCPA celebrates our Centennial year! 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. **New this year is a silent auction, pickleball tournament, and free fun run.** Visit our Convention webpage to register online or download a printable registration form.

Now Offering 16 Hours of CPE!

We have added an additional day of CPE learning on Wednesday, June 24, bringing you four 4-hour course options.

- **Wednesday, June 24 8:30am – 12:00pm**
Ethics, Rules, and Regulations, Bill Taylor
- **Wednesday, June 24 1:00pm – 4:30pm**
Building and Spending a Retirement Fund, Bill Taylor
- **Thursday, June 25 8:30am – 12:00pm**
Amazing Face Reading: A Powerful Tool for Effective Interactions, Ann Marks
- **Thursday, June 25 1:00pm – 4:30pm**
Best Practices for Avoiding Corporate Credit Card and Expense Reimbursement Fraud, Wil Crawford

continued on page 9

IN MEMORIAM

HAYWARD GLENN ANDERSON
Hattiesburg
Died December 25, 2019

KENNETH SAMUEL "KEN" PACE, JR.
Ridgeland
Died February 13, 2020

TERRY LEN VARNER
Water Valley
Died January 25, 2020

MEMORIAL GIFT to the EDUCATION FOUNDATION in memory of

TERRY LEN VARNER
Water Valley

By
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CHARLES VEAZEY
Marks

By
CORBIN & ASSOCIATES PLLC
Madison



The new CPAs include Eugene Marshall Acklin, Michelle A. Batie, Nina Elise Bellipanni, John E. Brandon, II, Laura Lynn Brumfield, Mallory Elizabeth Carcich, Hailey Renyta Chisolm, Morgan Elyse Daniels, Brett Stewart Davis, Purnima Dhillon, Steven William Eilders, Moises Guevara Espinal, Jasmine J. Johnson, Grace Allison Lunardini, Jamie Michelle McGinty, Robert Pickering Montgomery, Latoya Shonta Moye-Bush, Christa Alexander Owen, Bailey Wright Posadas, David Tyler Pray, Mary Elizabeth Scott, Jessica L. Sullivan, Sarah Crystal Weems, and Loretta Denise Williams.

New CPAs Honored Nov. 2 at State Board Ceremony

The Mississippi State Board of Public Accountancy honored new CPAs during their fall CPA License Presentation Ceremony November 2 at the Mississippi State Capitol. MSCPA Chairman of the Board Donna Bruce provided an introduction to the Society and MSCPA Young CPA Network President Shannon Adams urged the new CPAs to become active in Society activities. Keynote speaker was MSCPA member and former MSBPA Board Chair Jimmy Burkes. State Board Chair Willie Sims administered the Oath of Title.



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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

GRETCHEN ARCHER

Gretchen K. Archer, CPA
Ocean Springs

JASON BRIGHT

HORNE LLP
Jackson

STEWART B. BURKE

BKD, LLP
Madison

NICOLE L. CLEVELAND

Mississippi Power Company
Pass Christian

MORGAN DANIELS

MS Office of the State Auditor
Jackson

KENNETH JACKSON

TMH
Hattiesburg

NICOLE MAXWELL

HORNE LLP
Oxford

LEIGH ANNE PITTS

BKD, LLP
Jackson

DARRYL SCHROEDER

First Tower Corp.
Brandon

MSCPA Honors Hamp King Award Winner



Ethan Emory of Millsaps College was honored at the MSCPA Tax Institute December 5 for his selection as the Hamp King Award scholarship winner. Emory 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 Emory are MSCPA Tax Institute trustees Barry Jones, William B. (Billy Buck) Staggers, and Tom Byrne.



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Member News

Baird and Stallings, CPAs, PA Announces Partners

Baird and Stallings, CPAs, PA is proud to announce that **Webb A. Baird, CPA** and **Drew Daniel, CPA** have been admitted as associate partners and **Ray Hawkins** has been promoted to senior manager. David Baird and Don Stallings, the founders of the firm, acknowledged, "We are proud to have such outstanding young members in the firm with the depth and years of experience they possess. We expect them to be the face of the firm for the future."

Webb Baird, CPA grew up in Indianola.



Baird

He furthered his education at Mississippi State University graduating in 2008 with a B.S. in Accountancy and completed a Master of Professional Accountancy in 2009.

Webb obtained his CPA license in 2009. After graduation, Webb worked for a nationally ranked top 20 public accounting firm in Memphis gaining extensive experience in leading audits of large privately held companies and providing tax consulting and compliance services to both individuals and businesses. Webb is married to Tommie Allen of Lyon and they have one daughter, Margot. Webb currently serves as the Treasurer of the Chickasaw Council of Boy Scouts of America.

Drew Daniel, CPA is a native of Greenville, Drew spent his early childhood

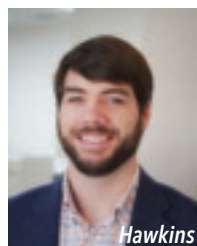


Daniel

in Indianola. He graduated from Delta State University in 2013 with a B.S. in Accountancy and obtained his CPA license in 2017. Drew has been with the firm since he graduated

from Delta State. Drew brings valuable experience and expertise in taxation, auditing, technology, and advisory services for small businesses to the firm. He lives in Cleveland with his wife, Hilary, and two daughters, Jordyn and Emery.

Ray Hawkins is a Cleveland native and current resident.



Hawkins

He furthered his education at Delta State University graduating with a B.S. in Accountancy in 2010. Ray's work experience started when he interned at

a public accounting firm while attending Delta State University. After graduation, he was hired full time by the public accounting firm gaining extensive knowledge in taxes and audits. He joined Baird and Stallings, CPAs, P. A. in 2014 and continued in the accounting profession. Ray is a certified QuickBooks professional and has extensive experience in small business operations, auditing, bookkeeping and tax services.

GranthamPoole Announces Two New Members for 2020

GranthamPoole PLLC is pleased to announce the admittance of two new members, effective January 1, 2020: **Melanie Hamel, CPA** and **Lacie Myers, CPA**. Hamel and Myers have both played integral roles in the success and growth of GranthamPoole for many years and are being recognized for their high level of dedication to both the firm and its clients.

Myers received her Bachelor of



Myers

Science in Business Administration from Mississippi College and was one of the original staff members of GranthamPoole, having joined one of its merger firms in 1996.

She spent several years as controller for a local non-profit before returning to GranthamPoole five years ago. Myers specializes in corporate, individual & partnership taxation, estate & gift planning, trusts, and financial & tax planning.



Hamel

Hamel joined GranthamPoole in 2006 after receiving her Bachelor of Science and Master of Business Administration from Mississippi College. She has also earned Certified Controls

Specialist and Certified Fraud Examiner designations. Hamel specializes in corporate, individual & partnership taxation and healthcare practice management. She is a member of the National Association of Certified Fraud Examiners and the AICPA where she was elected into the 2010 AICPA Leadership Academy. She is also a past president of the MSCPA Young CPA Network and has served on the MSCPA Board of Governors as a representative of Central Chapter. She currently sits on the board of the Central Mississippi Chapter of Certified Fraud Examiners and serves on the Long Range Planning and Young CPA Liaison Committees for the MSCPA.

Honor an MSCPA Member for Public Service

The membership is invited to nominate a member for consideration for the MSCPA 2020 Public Service Award. The winner will be recognized during the 2020 Annual Convention awards presentation on Saturday, June 27, 2020 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 17, 2020. Submit a nominee's name 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 Chuck Caldwell, Natchez; Shawn Gillenwater, Jackson; and Mary Williams, Meridian.

McLeod & Associates, P.A. is now McLeod & Rigel, P.A.



William E. McLeod, LL.M., JD, CPA has named **Matthew Rigel, JD** partner and shareholder in McLeod & Rigel, P.A. in Hattiesburg.

Matthew practices in the areas of estate planning, probate, business entity formation and transactions, and tax controversy matters. He is a member of the Mississippi Bar Association. Matthew attended law school at The University of Mississippi School of Law and received his Juris Doctorate in 2014. Prior to law school, he graduated Cum Laude with a Bachelor of Arts in Political Science from Mississippi State University in 2011 where he

was the Vice President of the Sigma Phi Epsilon Fraternity.

McLeod & Rigel, P.A. has been providing professional legal services to clients throughout Mississippi since 2004. The law firm represents clients throughout the State of Mississippi with respect to their business, tax, and estate planning matters.

Silas Simmons, LLP Announces Partner

Silas Simmons, LLP is pleased to announce that **Scott Adams, CPA** has been admitted as partner effective January 1, 2020.



Scott graduated with a Bachelor of Business Administration with majors in Managerial Finance and Accounting from the University of Mississippi. He joined Silas Simmons in 2007 and specializes in providing audit and attest services to financial institutions, employee benefit plans, and other for-profit industries.

Scott currently serves on the MSCPA Banking and Finance Committee. He is a past committee member and past Chairman of the MSCPA Governmental Accounting and Auditing Committee and served on the MSCPA Young CPA Network Board of Directors.

Scott's active involvement with the community includes being a member of the Natchez Rotary Club, Natchez Balloon Festival, Southwest Mississippi Ole Miss Alumni Club, Historic Natchez Foundation, Cathedral School, and Jefferson Street United Methodist Church.



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Meet Our Members

Legacy Spotlights

As a tribute to the 100th Anniversary of the MSCPA, we want to spotlight members during our year-long Centennial Celebration who are legacies of the profession – MSCPA members whose family is or was also a MSCPA member, CPA, accountant, or accounting student. We are honored to have numerous legacies of the profession and want to begin by spotlighting our five legacy MSCPA Chairmen.

Lewis E. Crook

1922-1924, 1923-1924, and 1927-1928 Chairman

Robert H. Crook

1934-1935 Chairman

Lewis E. Crook (1869-1931) of Meridian was one of the best known CPAs in Mississippi long before the state had a CPA law. He conducted audits for the City of Starkville in 1909, the University of Mississippi in 1913, and for the City of Jackson as early as 1914, and of other government entities in Mississippi, including the state penitentiary. In 1916, Lewis incorporated a business with the name of Scientific Accounting and Audit Company, but it has not been determined whether he ever practiced under that organizational name. Lewis was instrumental in getting the 1920 CPA law passed and was a charter member of the MSCPA. Despite getting the CPA law passed, and being a long-time practitioner, Lewis was not granted the State's first CPA certificate; instead he was awarded Certificate #9, because the initial certificates were assigned in alphabetical order, and Crook was the ninth name on the alphabetized list of initial applicants. Lewis was the first MSCPA Chairman to serve multiple terms.

Lewis's son, Robert H. Crook (1895-1973), was a 1916 graduate of the University of Mississippi and a veteran of World War I. He received his CPA license and worked for his father's firm that operated out of the Threefoot Building in Meridian. The Crook family has an extensive legacy of public accounting in Mississippi with Robert's father, uncles, and brother all being CPAs.

Dora Rose Herring

1990-1991 Chairman

Clyde Herring

2004-2005 Chairman



Dora Rose Herring, DBA, CPA (1928-2018), was Emerita Professor at Mississippi State University. Dora was the first female accounting student at Mississippi State University, the first doctoral student admitted to the DBA program, the first female hired to teach in the College of Business, and the first female to serve as the Chairman of the MSCPA. She became the first at MSU to specialize in what is now called accounting information systems thereby solidifying her place on the faculty. During her time at MSU, Dora was involved in the transition from a department to a school of accountancy. A true legend of MSU accounting, the MSU accountancy suite was recently renovated and named in her memory. Dora also served on numerous standing and special committees of the MSCPA including the Long Range Planning and Accounting and Auditing Committees and is the 1988 MSCPA Outstanding Educator.



Dora's son, Clyde Herring, is Associate Clinical Professor of Accountancy at Mississippi State University in Starkville. He is currently serving the MSCPA as our North Central Chapter President and as a member of the Long Range Planning Committee. He previously served on

the MSCPA Awards, Education and Scholarships Committee and is the 2001 MSCPA Outstanding Educator Award winner. Clyde and his wife, Tammye, have two sons, Chris and Jordan. Chris received his Bachelor of Accountancy and Master of Taxation from Mississippi State University in 2010 and 2011. After earning his CPA license and working in public accounting, he received his Doctor of Optometry degree and is now an Optometrist with Crigler Family Vision Center in Starkville. Jordan received his Bachelor of Science in Bioengineering and Biomedical Engineering from Mississippi State University in 2014, his Master in Neuroscience from the University of Mississippi Medical Center in 2016, and his Bachelor of Accountancy from Mississippi State University in 2017. He is now a Senior Technology Risk Analyst with HORNE LLP in Memphis.

T. E. "Thomas" Lott, Sr.

1936-1937 Chairman

T. E. "Tommy" Lott, Jr.

1979-1980 Chairman



T. E. "Thomas" Lott, Sr. (1889-1971) opened an accounting firm in Columbus after a stint in the military and a short-lived career in teaching. A graduate of Millsaps College, Thomas became a CPA in 1926 and was issued certificate #126 from the newly-formed Mississippi State Board of Accountancy. He served as Treasurer of the Mississippi Board of Public Accountancy and as Managing Partner of the public accounting firm T. E. Lott & Company until his death. The MSCPA T. E. Lott, Sr.

Silver Medal, given to those who attained the highest scores in passing all parts of the exam taken for the first time in one sitting during each calendar year, is named in his memory.



Thomas' son, T. E. "Tommy" Lott, Jr. (1936-2018), who was born the year his father was MSCPA Chairman, followed in his father's footsteps. After graduating from Mississippi State

University, he joined his father's Columbus accounting firm in 1958. He helped carry on a family tradition of excellence in accounting practices and services, but also brought his own strengths to the table by paving the way to include services in consulting, financial statement audits, estate planning and retirement planning. He was active with various economic development endeavors and served on numerous industry boards and was awarded the MSCPA Public Service Award in 1984.

Bill Rush Mosby, Jr.
1977-1978 Chairman

Sim Mosby
2010-2011 Chairman



Bill Rush Mosby, Jr. (1937-2010) was a retired partner at Silas Simmons, LLP. He graduated from Millsaps College in 1958 with a Bachelor of Science in Mathematics and

from Mississippi State University with a Bachelor in Accountancy in 1960. He successfully passed the CPA exam and was awarded the designation of CPA in 1962, receiving certificate number 850. He first taught math to high school seniors and later accepted a position with a major Big 8 accounting firm from New Orleans. Before his departure, Mosby received a call from Silas Simmons in Natchez asking him to interview for a position at the accounting firm of Silas M. Simmons and Company. While interviewing, he was offered the position on the spot. He accepted and began his life-long accounting career in Natchez. Mosby was admitted as the fifth partner of Silas M. Simmons & Company

ten years later in 1970. Having served as managing partner of the Firm for many years, Mosby retired as a senior partner in 2007 but continued to service clients on a limited basis until his death, providing a full 50 years of unwavering service to his grateful clients. Having chosen Natchez as the place to settle down and raise his family, Mosby was dedicated to community service, always striving to help make a difference. He was also the proud recipient of the 2000 MSCPA Public Service Award. The MSCPA Bill Rush Mosby, Jr. Scholarship was created in his memory and is awarded each year to an undergraduate accounting major from the Natchez (Adams County) area.

Bill's son, Sim Mosby, is Managing Partner at Silas Simmons LLP in Natchez. He is currently serving the MSCPA on the Young CPA Liaison Committee and has also served on numerous standing and special committees of the MSCPA including the Taxation, Health Care Services, Firm Administration and Development, and Political Action Committees. He has also represented the MSCPA as an elected AICPA Council Representative. Sim and his wife, Betsy, have two sons, Cole and Sam. Cole was a summer intern at Silas Simmons, LLP in 2019 and is currently pursuing his Accountancy degree at the University of Mississippi.

Fred T. Neely
1941-1942 Chairman

Ralph F. Neely
1966-1967 Chairman

Fred T. Neely (1897-1967) moved to Greenwood in 1927 where he started a public accounting firm. Fred passed the CPA Examination in 1930 and received certificate No. 141. He had the distinction of serving as the Society



Chairman at the onset of World War II—a time when many members were going off to war and firms were desperate to find replacement talent for the additional work that was brought about by defense

contracts and an expansion of the federal income tax base. He hosted his annual convention in May 1942 at the Hotel Pinehurst in Laurel, the only time that the MSCPA annual convention was ever held in Laurel. Following Fred's service as Chairman of the Society, he would remain faithful to the organization for the next quarter century, serving on many committees during his lifetime. He also held the longest ever tenure on the State Board of Public Accountancy, serving as chairman for over 17 years (1950-1967)—a position he held at the time of his death. For many years, he was a member of the Editorial Advisory Board of the Journal of Accountancy and published many articles in that publication. Fred also wrote a column entitled "Adventures in Tax" in every issue of the MSCPA newsletter between 1947 and 1967. The MSCPA Fred T. Neely Gold Medal, given to those who attained the highest scores in passing all parts of the exam taken for the first time in one sitting during each calendar year, is named in his memory. The CPA firm he founded continues to operate under the same name to this day.

Fred's son, Ralph F. Neely, graduated from Mississippi State University and practiced in his father's Greenwood CPA firm, Fred T. Neely and Company. He helped organize and served as first President of the MSCPA Delta Chapter



in 1960 and was an original trustee of the MSCPA Education Foundation in 1972. In 2016, the Foundation named one of its graduate scholarships to honor his long-time service as a trustee. For many years he was a regular participant in the MSCPA tennis tournament at the annual meeting. Ralph, now 93 years of age, has retired and with his wife lives in a retirement facility in Oxford.

If you or someone you know is a legacy of the profession, please email names and contact information to jtruhett@ms-cpa.org.



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AICPA and MSCPA Visit Mississippi's G400 Firms

Out of more than 40,000 CPA firms across the United States, the AICPA identifies the top 101-500 firms and classifies this group as The G400. The firms that make up The G400 have 21-90 AICPA members in their firm and serve America's small and mid-sized businesses. The seven G400 firms in Mississippi are Alexander, Van Loon, Sloan, Levens & Favre; GranthamPoole; Haddox Reid Eubank Betts; Harper, Rains, Knight & Company; T.E. Lott and Company; TMH; and Watkins, Ward & Stafford.



In December, Jay L. Rothberg, Director of Group 400 Initiative and former Vice-President-Office of the CEO (Retired), visited the seven G400 firms in Mississippi with MSCPA President/CEO, Karen Moody. Jay updated firm members on issues being addressed at the national level and provided valuable tools and trends to help them manage their firms. Karen discussed current member benefit projects underway and legislative issues affecting the profession and presented Centennial gifts.

Jay is also a former Executive Director of the Society of Louisiana CPAs and resides in New York.



MSCPA Leaders Meet with National AGA President

MSCPA Vice Chairman/Chairman-Elect Annette Pridgen, MSCPA Governmental Accounting and Auditing Committee member Billy Morehead, and MSCPA President/CEO Karen Moody met with National Association of Government Accountants (AGA) President and former AICPA Chairman, Ernie Almonte, to discuss issues affecting the profession. Ernie was the keynote speaker at the AGA Jackson Chapter professional development training event January 29 at the Hinds Community College Clyde Muse Center in Pearl.

CONVENTION

continued from page 1

Members who register and attend Convention will also receive 2 hours of CPE credit for the speaker presentations on Friday morning.

Book Your Room Now - Room Reservation Group Code 241190

This year also marks the 35th consecutive 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 241190. Sandestin has room rates starting at \$178. Weekly rates are also available. Your cut-off date for reservations is May 24, after which rooms will be sold on a space-available basis. There are only a certain number of each room type in our block so book early and be sure to get the room you want!

Why should you book in our MSCPA room block?

- You will help us meet our contractual obligations with Sandestin and

earn comp nights for our staff and speakers.

- You have access to all Sandestin amenities including free resort transportation - no tram access if you rent through other rental companies.
- You pay lower fees - the resort fees you pay when booking directly with Sandestin are lower than the owner fees and service fees on VRBO and other owner rental sites.

You can book your accommodations online or via phone 800-320-8115. If you have any trouble booking your room reservation, call Karen Moody at the MSCPA office 601-856-4244.



HOUSING REQUEST FORM

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MISSISSIPPI SOCIETY OF CPAS 2020 ANNUAL MEETING

Tuesday, June 23, 2020-Monday, June 29, 2020

GROUP CODE: 241190

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 **Sunday, May 24, 2020**, 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.

ACCOMMODATIONS	DAILY RATE	WEEKLY RATE	ACCOMMODATIONS	DAILY RATE	WEEKLY RATE
BEACHSIDE STUDIO*	\$315.00	\$1,985.00	LAKESIDE 2 BDRM	\$305.00	1,922.00
BEACHSIDE 1 BDRM*	\$370.00	\$2,331.00	LAKESIDE 3 BDRM	\$395.00	2,489.00
BEACHSIDE 2 BDRM*	\$504.00	\$3,176.00	BAYSIDE 2 BDRM	\$275.00	1,733.00
BEACHSIDE 3 BDRM*	\$630.00	\$3,969.00	VILLAGE - STUDIO	\$219.00	1,380.00
WESTWINDS 1 BDRM*	\$382.00	\$2,407.00	VILLAGE 1 BDRM	\$242.00	1,525.00
WESTWINDS 2 BDRM*	\$532.00	\$3,352.00	VILLAGE 2 BDRM	\$355.00	2,237.00
WESTWINDS 3 BDRM*	\$647.00	\$4,077.00	VILLAGE 3 BDRM	\$444.00	2,798.00
SOUTHSIDE 2 BDRM	\$337.00	\$2,124.00	GRAND COMPLEX STUDIO	\$229.00	1,443.00
SOUTHSIDE 3 BDRM	\$434.00	\$2,735.00	GRAND COMPLEX 1 BDRM	\$251.00	1,581.00
BEACHWALK 2 BDRM	\$320.00	\$2,016.00	GRAND COMPLEX 2 BDRM	\$362.00	2,281.00
BEACHWALK 3 BDRM	\$407.00	\$2,565.00	GRAND COMPLEX 3 BDRM	\$469.00	2,955.00
LUAU 1 BDRM	\$241.00	\$1,519.00	BAYSIDE AT SANDESTIN-GUEST ROOM	\$178.00	1,121.00
LUAU 2 BDRM*	\$350.00	\$2,205.00	BAYSIDE AT SANDESTIN-1 BDRM	\$222.00	1,399.00
LUAU 3 BDRM*	\$437.00	\$2,754.00			

*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. Any remaining balance will be charged within 7 days prior to arrival. If cancelling within 7 days of arrival, there will be forfeiture of entire reservation amount.

BOOK ONLINE AT www.Sandestin.com and enter group code 241190



MSCPA 2020 Annual Convention Registration

June 24-28, 2020 | 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

_____ **Wednesday, June 24 8:30am – 12:00pm | CPE Credit: 4** **\$160**

Ethics, Rules, and Regulations, Bill Taylor

_____ **Wednesday, June 24 1:00pm – 4:30pm | CPE Credit: 4** **\$160**

Building and Spending a Retirement Fund, Bill Taylor

_____ **Thursday, June 25 8:30am – 12:00pm | CPE Credit: 4** **\$160**

Amazing Face Reading: A Powerful Tool for Effective Interactions, Ann Marks

_____ **Thursday, June 25 1:00pm – 4:30pm | CPE Credit: 4** **\$160**

Best Practices for Avoiding Corporate Credit Card and Expense Reimbursement Fraud, Wil Crawford

SUBTOTAL

\$ _____

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

_____ **Golf Tournament | Friday, June 26, 2020** **\$80 per person**

Includes green fee, cart fee, tournament registration and refreshments. Reservation must be received by May 31, 2020 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 26, 2020** **\$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): _____

_____ **Pickleball Tournament | Friday, June 26, 2020** **\$40 per person**

Includes court time, wiffle balls, refreshments, and instructor. Easy for beginners to learn!

Player(s): _____

_____ **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 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

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The Financial Aspects of Divorce and PERS of Mississippi

By Robert D. (Rob) King, Jr., CPA/ABV/CFF



King

You would be hard-pressed to find many CPAs who desire to be in the midst of divorcing clients, but the reality is that many of you will be asked to play an important role in the divorce process. That role will likely be providing financial advice to your divorcing clients; and as many of you know, the Mississippi State Board of Public Accountancy offers guidance for CPAs as it relates to independence issues in litigation matters such as divorce. Of the many financial issues, you may be asked to advise on retirement benefits. When you think of retirement benefits, the first thought that may come to mind is the type of retirement plan: defined contribution plan or defined benefit plan. This article will focus on the latter, and more specifically, retirement benefits from the Public Employee Retirement System of Mississippi (PERS) in the context of marital dissolution.

Depending on the scope of the engagement and considering independence issues, you may be retained by the court, jointly by consent from both parties, or by either party to value PERS retirement benefits. PERS no longer provides this service for divorcing parties, and, currently, there is limited guidance addressing the complex issues involved in valuing PERS retirement benefits for divorce. One might think the value of the PERS future retirement benefits is simply the contributions made to the plan; and you might be correct in a situation where a PERS member will retire before reaching the vesting period. That seems easy, but defined benefit plans are valued based on the calculation of the present value of the anticipated stream of income¹. Therefore, scenarios may involve vested or non-vested members who, at the time of divorce, have retired, will be retiring soon, or those who have much of their career ahead of them.

Conversely, for any unvested member, consideration must be given for any uncertainty surrounding the likelihood of that member reaching the required vesting period. As you familiarize yourself with your client's retirement plans, the PERS of Mississippi website can be very helpful in understanding how your client may receive their retirement benefits. Resources include the PERS Member Handbook, the PERS Actuarial Report, and others.

Not quite as complex would be a scenario with a divorcing client who has retired or is soon to retire and has been married for the duration of the membership with PERS. Conversely, you may find yourself with a divorcing client who has only recently vested and will likely receive salary increases over the many years left in their career. All of this is to say that for equitable distribution purposes at the time of divorce, the CPA will need to be careful when considering property for the court to determine its character as either being part of the marital estate or separate property. The court may determine post-divorce salary increases should not factor into the value of the PERS future retirement benefits. Many courts recognize what is called a marital coverture fraction. The numerator is based on the number of years of service during the marriage, and the denominator is the total years of service. As the CPA, you must defer to the court on the characterization of property for divorce purposes as this is an issue related to law.

As previously discussed, present value calculations are required. Components of that calculation will vary based on the divorcing client's status at the time of divorce. Generally, pieces of the calculation will include a base benefit, cost of living adjustments, a projection period, discount rates, and other components. Much of the foregoing information is addressed in the resources available on the PERS of Mississippi website. Commonly relied upon life tables, such as the United States

continued on page 13

DIVORCE & PERS

continued from page 12

Life Tables published in the National Vital Statistics Report, may be consulted for the projection period. The projection period is another area of concern, as the CPA should scrutinize how the divorcing client may receive their retirement benefits. PERS provides seven base options from which to choose, plus, if eligible, a Partial Lump Sum Option. A retired or soon-to-retire spouse may choose to receive a reduced benefit during their life expectancy, so that, after death, beneficiaries would continue to receive those benefits over a certain period. Whatever the court relies upon as the value of the PERS retirement benefits, it should be noted that unlike other retirement plans that can be directly divided via a QDRO (Qualified Domestic Relations Order), PERS does not allow for direct division.

There are many moving parts to the madness of this mathematical process, and this article has only addressed a few of them. However, as a CPA, you possess the analytical skills and financial knowledge to be able to guide your client. Aside

from evaluating and maintaining your independence, remember your role and capacity is related only to the financial

aspect and not the legal issues that will be involved.

Robert D. (Rob) King, CPA/ABV/CFF is a shareholder in The Koerber Company, PA, a Hattiesburg CPA firm that limits its services to business valuation and forensic economics/accounting.

¹Shulman, Gary A. and David I. Kelley, *Dividing Pensions in Divorce: Negotiating and Drafting Safe Settlements with QDROs and Present Values*, 2009.

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 17, 2020. 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 2020 Annual Convention awards presentation on Saturday, June 27, 2020 at Sandestin Golf and Beach Resort in Destin.

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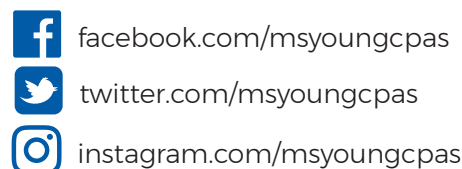
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Annual Young CPA Conference

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- MSCPA Training Center, Ridgeland
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See www.ms-cpa.org for complete agenda and to register online

You are also invited to a MSCPA Young CPA Network Social Tuesday evening, April 28, 2020, prior to the conference.



Volunteer or Nominate a Member for MSCPA Young CPA Network Board

The MSCPA Young CPA Network is seeking volunteers and nominations for 2020-2021. Young CPA Network members will elect new members to the Young CPA Network Board of Directors at the Annual Young CPA Conference on April 29, 2020. You are invited to volunteer or send names of suggested candidates to Shannon Adams, Young CPA Network President, at msyoungcpa@ms-cpa.org by April 17, 2020.



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Southern Miss Spring Meet and Greet

January 30



Deena Keasler, MSCPA Young CPA Network Board Member; Annette Herrin, MSCPA Past Chairman; and Amber Hatten, MSCPA Member and Professor of Practice and Master of Professional Accountancy Director at Southern Miss

Mississippi State Beta Alpha Psi

January 23



Karen Moody, MSCPA President/CEO and Shannon Adams, MSCPA Young CPA Network President

Ole Miss Beta Alpha Psi Spring Meet the Firms

January 29



Allison Garner, MSCPA Young CPA Network Past President



Mark Wilder, MSCPA Member and Dean of the Patterson School of Accountancy at Ole Miss and Karen Moody, MSCPA President/CEO



Cole Mosby, son of MSCPA Member Sim Mosby, pictured with Karen Moody, MSCPA President/CEO



Upcoming Event

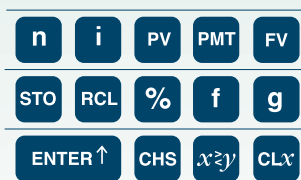
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CPA Awareness Event
Thursday, March 19, 2020

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Mississippi State Career Fair

January 16



Philip Chu, MSCPA Young CPA Network Treasurer; Ashley Sullivan, MSCPA Young CPA Network Board Member; and Clyde Herring, MSCPA Member and Associate Clinical Professor of Accountancy at Mississippi State



Karen Moody, MSCPA President/CEO and Shawn Mauldin, MSCPA Member and Director of the Adkerson School of Accountancy at Mississippi State

YCPA Board Christmas Dinner

December 10



Jack Kaler, Vice President/President-Elect; Sammy Gill, At-Large Board Member; Shannon Adams, President; Phillip Chu, Treasurer; and Lydia Windham, Immediate Past President

CHAPTERS

Central Chapter

The Central Chapter met January 23 at the MSCPA Training Center in Ridgeland for their quarterly luncheon with Tim Mask and Jim Koerber presenting.

Central Chapter Officers: Blair Jussely, President; Rob Zischke, Vice President-Programs; Shawn Gillenwater, Vice President-Membership; Walker Roberts, Treasurer; and Sammy Gill, Secretary.

The MSCPA Central Chapter will have their quarterly luncheon on Thursday, April 30 at the MSCPA Training Center, 306 Southampton Row, Ridgeland, MS 39157. Chapter members will be voting to elect new Central Chapter officers for 2020-2021 including Vice President-Programs, Vice President-Membership, Secretary, Treasurer, and three Board of Governors representatives. To volunteer as an MSCPA Central Chapter Officer or Board representative, or to nominate a chapter member, email Karen Moody, kmoody@ms-cpa.org.



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North Central Chapter

The North Central Chapter met January 21 on the campus of Mississippi State University in Starkville for a CPE Event with Jimmy Burkes presenting. MSCPA Chairman Donna Bruce, MSCPA Vice Chairman/Chairman-Elect Annette Pridgen, MSCPA Young CPA Network President Shannon Adams, and MSCPA President/CEO Karen Moody attended to kick off MSCPA's Centennial Celebration. The Richard C. Adkerson School of Accountancy and Director Shawn Mauldin hosted a MSCPA Centennial Reception and tour of the newly remodeled Dora Rose Herring Accountancy Suite. Special thanks to event sponsors T. E. Lott & Company and Watkins, Ward & Stafford.

North Central Chapter President: Clyde Herring



Shawn Mauldin, Clyde Herring, Jimmy Burkes



MSCPA Leadership



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Spring CPE & Social Event Friday, April 24, 2020 The Mill at MSU

The MSCPA North Central Chapter and the Adkerson School of Accountancy will have a Spring CPE & Social Event on Friday, April 24, 2020, at The Mill at MSU, 600 Russell Street, Starkville. All MSCPA members are invited to attend. Following the CPE seminar, the Adkerson School of Accountancy will host a social at the Rooftop Club in left field lounge of Dudy Noble Field as the MSU Bulldogs play Texas A&M in the first game of the weekend series. Food and drinks will be provided during the game. Game time is 6:30pm but you may enter as early as 4:45pm if desired.

AGENDA

1:00pm - 2:40pm *Hot Topics and Updates in*

Forensic & Valuation Services for CPAs

Jim Koerber, The Koerber Company, PA
Credits: 2

3:00pm - 4:40pm *Planning for IRAs After
The SECURE Act*

David Martin, Navitas Wealth Advisors
Credits: 2

4:45pm *Social at the Rooftop Club*

6:30pm *MSU Baseball vs. Texas A&M*

COST

CPE: \$60

Social/Game: \$60



Register online by April 10, 2020, at www.ms-cpa.org

East Central Chapter

The East Central Chapter met December 12 at Weidmann's Restaurant in Meridian for their chapter meeting and CPE with David Stevens and Rob Zischke presenting. Special thanks to First State Bank for sponsoring this event.

East Central Chapter Officers: Pam Steverson, President; Stuart Yarbrough, Vice President; and Doug Coleman, Secretary/Treasurer.



Gulf Coast Chapter

The Gulf Coast Chapter met December 5 at Great Southern Club in Gulfport for a Christmas Social with music by Hank Beruman.

Gulf Coast Chapter Officers: Kim Banisch, President; Mary Bui, Vice President; Richard Brown, Treasurer; and Maria Saylor, Secretary.



Southwest Chapter

MSCPA would like to thank the Southwest Chapter for their generous donation of \$2,000 to the MSCPA to support the history book project as we celebrate #100YearsMSCPA.

WINTER EVENTS

Mississippi State Board of Public Accountancy CPA License Presentation Ceremony

MSCPA Chairman Donna Bruce, MSCPA Young CPA Network President Shannon Adams, and MSCPA Member Jimmy Burkes were speakers at the Mississippi State Board of Public Accountancy CPA License Presentation Ceremony November 2.



Nina Bellipanni of KPMG LLP receives her CPA license from Mark Peach, Partner.



Brett Davis of Harper, Rains, Knight & Company receives his CPA license from Willie Sims, MSBPA Chair.



Steven Eilders of Haddox Reid Eubank Betts PLLC receives his CPA license from Willie Sims, MSBPA Chair.



Bailey Posadas of BKD, LLP receives her CPA license from Willie Sims, MSBPA Chair.



CPA legacy Morgan Daniels of the MS Office of the State Auditor, with her mother, Bobbie Daniels of Jackson State University.



Jamie McGinty of TMH receives her CPA license from Bill Kelly, Partner.



New members of the MSCPA pictured with Donna Bruce, MSCPA Chairman; Karen Moody, MSCPA President/CEO; and Shannon Adams, MSCPA Young CPA Network President.



Shannon Adams, MSCPA Young CPA Network President; Jimmy Burkes, MSCPA Member and Keynote Speaker; Donna Bruce, MSCPA Chairman; and Karen Moody, MSCPA President/CEO.

Board of Governors and Past Chairmen's Christmas Event

MSCPA Chairman, Donna Bruce, and her husband, Clark, hosted the annual Board of Governors and past Chairmen's Christmas reception and dinner December 6 at the Capital Club in downtown Jackson with over twenty Past Chairmen in attendance. As part of our Centennial celebration, this year's event was expanded to include invitations to the State Board, who is also celebrating 100 years, past YCPA Presidents and state leaders.



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Young CPA Conference

April 29, 2020

MSCPA Training Center, Ridgeland

Business & Industry Management Development Conference

May 12-13, 2020

MSCPA Training Center, Ridgeland

Accounting & Auditing Conference

May 14, 2020

MSCPA Training Center, Ridgeland

Technology Conference

May 18-19, 2020

Embassy Suites, Ridgeland

Governmental Accounting & Auditing Conference

August 13-14, 2020

Hilton-Jackson

Banking and Finance Conference

August 24, 2020

Hilton-Jackson

Agricultural and Farm Activities Conference

August 27, 2020

MSCPA Training Center, Ridgeland

Health Care Services Conference

September 24, 2020

MSCPA Training Center, Ridgeland

Industry Conference

October 22, 2020

MSCPA Training Center, Ridgeland

Not-for-Profit Conference

October 29, 2020

Hilton-Jackson

Accounting Education Conference

October 30, 2020

MSCPA Training Center, Ridgeland

Business Valuation & Litigation Services Conference

November 19, 2020

MSCPA Training Center, Ridgeland

Mississippi Tax Institute

December 2-3, 2020

Hilton-Jackson

The full CPE Catalog is available online at www.ms-cpa.org.



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