

## Wil Crawford 2015 Rising Star Winner

Wil Crawford of Jackson, a Senior Manager with BKD, was honored during the Annual Convention as the recipient of the 2015 Rising Star Award.

The Rising Star Award, established this past year by the Board of Governors, recognizes an outstanding young CPA in Mississippi who has demonstrated exemplary leadership skills and involvement in the MSCPA, the accounting profession and/or their communities. Recipients must be age 40 or under and 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.

As the first winner, Wil has demonstrated leadership and involvement of a Rising Star.

Wil's public accounting experience includes providing audit and accounting services to telecommunications, governmental, not-for-profit, higher education, and health care clients.

He has served as the in-charge and manager for compliance Single Audits under OMB Circular A-133 for various hospitals, universities, governmental and not-for-profit agencies, as well as Yellow Book financial statement and Rural Utility Service (RUS) compliance audits for telecommunications entities. Within BKD, Wil has obtained the designation as an ACL Champion, signifying his accomplishments with the ACL Data Extraction and Analysis software. He also has assisted BKD's Learning & Development Department with audit staff training and in creating advanced virtual OMB Circular A-133 compliance training for BKD personnel.

Wil is a member of the AICPA and MSCPA. He was awarded the Silas M. Simmons Bronze Medal for the 2007 CPA Exam. He has also served as president of the MSCPA Young CPAs, Chair of the MSCPA Governmental Accounting & Auditing Committee, a member of the



*Wil Crawford*

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Newly elected officers for the 2015-2016 MSCPA fiscal year are: top from left, Cheryl Lee, Jackson, Chairman; and Charles Prince, Vice Chairman/Chairman-Elect. Bottom from left are Ted Edwards, Jackson, Treasurer; and Annette Herrin, Hattiesburg, Secretary. Officers were elected during the Annual Business Meeting at the Sandestin Golf & Beach Resort on June 27.



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*Opinions expressed are not necessarily the official policy of the MSCPA. Advertising is accepted in good faith that the product/services are of value stated.*

# Welcome New Members

New members include: Shannon Lee Adams, Shaunesey Lee Collins, Leanne Tipton Cross, Joseph Kaleb Deese, Robert Mark Ellmer, Lacie Bartholomew Junkin, Kathryn Carroll Lewis, Justin James Mistal, Allan John Watson, III, and Lydia Samantha Windham.

Now completing the membership process are:

**Noel Addy** was born in Biloxi and received his BS and MS from the University of Arizona and Ph.D. from the University of Florida. Dr. Addy is an Associate Professor at Mississippi State University in Starkville.

**William Randolph Hanna** was born in Carthage and received an AA in Business Administration from East Central Junior College and a BS in Accounting from Mississippi State University. He is the Senior Financial Manager for the Mississippi Band of Choctaw Indians in Choctaw.

**Kaitlin Dennis Monsour** was born in Davenport, Iowa and received Bachelor of Accountancy and Master of Accountancy degrees from the University of Mississippi. She is an Accountant with Grantham Poole CPAs in Ridgeland.

**Donna C. Parmegiana** was born in Pascagoula and received Bachelor of Accountancy and Master of Accountancy degrees from the University of Mississippi. She is a Supervisor with the Office of the State Auditor in Jackson.

**Jeana Oliver Rich** was born in Gulfport and earned a BSBA in Economics, an MBA, a BSBA in

Accounting and an MPA from the University of Southern Mississippi. She is a Senior Accountant with Nicholson & Company, PLLC in Hattiesburg.

## WIL CRAWFORD

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MSCPA Long Range Planning Committee and as an MSCPA Board member. He is also a member of the Association of Governmental Accountants and serves as a reviewer for the Government Finance Officers Association's Certificate of Achievement in Excellence in Financial Reporting Program.

Wil previously served as Treasurer on the Board of Directors of the Central Mississippi Chapter of the Mississippi State University Alumni Association and currently serves on the finance committee at Madison United Methodist Church.

Wil is a summa cum laude graduate of Mississippi State University with a BS in accounting and an M.Acc. degree.

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**VANCE RANDALL** of Ridgeland was elected to a three-year term as an at-large member of the Board of Governors during the Annual Business Meeting June 27 in Destin. Vance served as MSCPA President in 2006-2007.

# Kimberly Hardy Selected for AICPA 2015 Leadership Academy

Kimberly Hardy, CPA/CFF, of Byram has been selected to participate in AICPA's 2015 Leadership Academy.

Kimberly is a Senior Audit Manager with Matthews, Cutrer and Lindsay, P.A. in Ridgeland.

The AICPA Leadership program engages candidates in a self-examination of leadership, what that means and how that impacts their personal life, career path, and the CPA profession.

The interactive dialogue with the profession's thought leaders, and other Academy participants, focuses on the issues currently facing the industry.

The Academy exposes the next generation of CPAs to a strong ethic of leadership and service while providing them with strategies to forge relationship to expand their competencies and empower them to become a leader within their organization, community and the CPA profession.

Kimberly has over eight years of experience in public accounting and has been with firm since 2007. She has extensive audit experience in the areas of small business, 401K compliance, governmental, and nonprofit organizations. She has audited a number of nonprofit organizations, including foundations, health and welfare organizations, trade associations, religious organizations, Rural Development and HUD multi-family housing projects.

She has also audited a number of small business companies in the industries of pharmaceuticals, technology, communications, and hospice care. Kimberly's governmental experience consists of preparation of GAAP packages and cost reports. She also has experience in the areas of nonprofit, partnership and corporate taxation.

Kimberly earned her Bachelor of Science and a Bachelor of Business Administration with a Major in

Accounting from Millsaps College. She also has a Master of Accountancy degree from Millsaps College as well.

Kimberly is a native of Greenville, MS where she is a member of Lily of the Valley COGIC. Kimberly currently serves as a member of the Millsaps College Else School of Management Advisory Board. She also serves on the Board of Directors of the Mother's Milk Bank of Mississippi, as the treasurer and is a member of the Junior League of Jackson. Kimberly and her husband Corey reside in Byram and attend True Believers Worship Center.



*Kimberly Hardy*

# Allison Garner Chosen for Alabama Leadership Academy Class V



*Allison Garner*

Allison Garner of Oxford has been selected to attend the Alabama Leadership Academy Class V.

Allison works in Corporate Accounting for FNC, Inc. in Oxford.

Offered through the Alabama Society of CPAs, the Academy includes:

- Four quarterly 8 hour in-person sessions beginning in May 2015 and concluding in May 2016. The other two classes are in late September and mid-January.

- Coaching calls, individual and firm projects between in-person sessions.
- Webinars and reading assignments between in-person sessions.
- Graduation and special recognition awards at the final session.

Allison is originally from Grenada and currently resides in Oxford. She received both her Bachelor's and Master's Degrees of Accountancy from The University of Mississippi's Patterson School of Accountancy. Allison interned at Horne LLP during her senior year of college and at Borg Warner upon completion of her Master's Degree. She has worked the past 4 years in Corporate Accounting with her current employer, FNC, Inc., a mortgage software technology company.

Allison is a member of the AICPA, MS Society of CPAs, and the MS Young CPA Network. Allison will serve on the board for the MS Young CPA Network for the 2015-2016 fiscal year. She is very active in the Industry Committee for the MS Society of CPAs and serves as the millennial chair for the 2015-2016 fiscal year.

Allison's community involvement consists of Young Professionals of Oxford, where she serves on the Our Team Our Town board, and helping with FNC's yearly United Way fundraisers.

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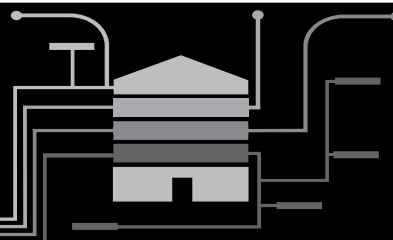
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# Survey Reveals **Talent** is a **Key Concern** among **CPA Firms**

CPA firms once again are feeling the pressure to hire and retain high-quality professionals. That's one of the most striking findings of the 2015 AICPA Private Companies Practice Section (PCPS) CPA Firm Top Issues Survey.

Reviewing the results, it's reasonable to conclude that factors such as steady demand for CPA services, continuing workload compression issues and, perhaps, concerns about the ongoing retirement of Baby Boom-generation partners have motivated firms to focus on their most important assets.

Conducted every two years, the PCPS survey spotlights the main challenges facing practitioners. Responses are categorized by firm size, with top-five lists released for sole practitioners, firms with 2 to 5, 6 to 10, 11 to 20 and 21 or more professionals. Overall, the survey offers a unique overview of firms' most pressing concerns.

## **Putting People First**

All firms with two or more

professionals identified finding quality talent as one of their top concerns and all practices with six or more CPAs also cited staff retention as a challenge. Staffing had long been a top issue in previous surveys, but that changed in 2009, the first survey conducted after the 2008 economic recession. The uncertain economy put client retention and related issues on the top of the list for every firm size for subsequent years—until now. Practice growth, a concern during the recession, did remain an issue on some firms' radar screens, cited as a top issue by sole practitioners and firms with 11 or more professionals.

## **The Next Generation**

At the same time, succession planning was a top-five issue for firms of all sizes this year, even among sole practitioners, who had not cited this as a chief concern in recent surveys. With the Baby Boomers now ranging in age from 50 to 69, firms may feel greater incentive to focus on the transition to a new generation of

leaders, which, for firms with 2 or more professionals will include finding and grooming staff members with leadership potential. For sole practitioners, this will include developing a practice continuation agreement with another practitioner, ensuring that clients would have somewhere to go if something were to happen to their CPA.

## **Grappling with Time, Workload and Complexity**

Another hot topic this year—and one relates to the staffing crunch—is seasonality/workload compression. While this has often been a top-five issue for smaller firms in past surveys, it made the list for firms of all sizes this year, perhaps reflecting ongoing challenges with frequent or late changes in tax laws and the late arrival of K-1s and Form 1099s. Service problems at the Internal Revenue Service have exacerbated the situation. The survey findings would seem to indicate that seasonality has

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## SURVEY

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grown into more than just a fact of doing business and evolved into a significant challenge for firms all year long. And whether firms need more people to deal with workload compression or fear losing them because of the stress it causes, it's fair to assume that it fuels firms' staffing worries. In addition, since part of the challenge of workload compression involves maintaining up-to-date knowledge of current regulations, it was not too surprising that firms with five or fewer professionals picked keeping up with changes and complexity of tax law changes as one of their top two issues, and these firms also named the effect on firms caused by state and federal regulations to their top five lists.

### *Leveraging Opportunities to Try New Solutions*

Given the appearance of so many familiar challenges, firms might consider embracing the opportunity to develop new solutions to recurring concerns

### **The Top Five Issues Facing CPA Firms**

#### *Sole Practitioners*

1. Keeping up with changes and complexity of tax laws
2. Seasonality/workload compression
3. The effect on firms caused by new federal and state regulations
4. Succession planning
5. Bringing in new clients

#### *Firms with 2 to 5 Professionals*

1. Finding qualified staff
2. Keeping up with changes and complexity of the tax laws
3. Succession planning
4. Seasonality/workload compression
5. The effect on firms caused by new federal and state regulations

#### *Firms with 6 to 10 Professionals*

1. Finding qualified staff
2. Succession planning
3. Seasonality/workload compression
4. Retaining qualified staff
5. Aging of owners/partners

#### *Firms with 11 to 20 Professionals*

1. Retaining qualified staff
2. Finding qualified staff
3. Succession planning
4. Bringing in new clients
5. Seasonality/workload compression

#### *Firms with 21 or More Professionals*

1. Retaining qualified staff
2. Finding qualified staff
3. Owner/partner accountability/unity
4. Seasonality/workload compression
- 5 (tie). Bringing in new clients
5. Succession planning

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# Responding to a Data Security Breach

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

The external auditor was assigned to audit the financial statements of a multi-state grocery store chain. During the audit, he uploaded payroll and pension plan data for about 5,000 employees onto his laptop computer, planning on encrypting the data when he got back to his office. He stopped for lunch at a restaurant, leaving his laptop in the car. When he returned, the doors were unlocked and the laptop was missing.

What should the auditor do now?

## 1) Report the loss immediately.

Many victims err in not reporting the theft immediately, either because they're embarrassed about the loss, worried about losing their job, or thought they just misplaced the device and would find it soon. However, every firm should persuade its leadership and its employees to adopt a strict policy that requires them to report losses immediately. This allows the firm to prevent further losses and to begin the repair and retrieval process right away. Some states' laws require that clients be notified within a short period of time

following the detection of a data loss.

**2) Activate safeguards for protecting personal information.** A remote mobile device security service is an effective way to provide safeguards capable of activating a "kill switch" if security has been compromised. Remote security enables a user to prevent access to protected files, or to execute complete data wiping in the event a computer, tablet, smart phone or USB storage drive has been lost or stolen. The service may also track devices when they are connected to the Internet.

Safeguards that protect information without user involvement are effective in reducing vulnerabilities. Encryption policies and other protective actions can be managed by the firm or by a third-party managed service provider (MSP). Both approaches should protect the organization independently of the end-user and should work whether the computer is online or offline. Some services are available by online subscription, without the need to purchase or support hardware or software

infrastructure.

**3) Notify the firm's attorney, risk adviser/insurance company.** The firm will need to verify whether it's a breach as defined by current state and/or federal laws. Your attorney and risk adviser will assist in making that determination. The advisers should also be able to help you fulfill the reporting and notification requirements under law.

Cyber liability or data breach insurance is recommended for covering data breach response costs, including notifications to clients and third parties, and computer network assets such as data. Some insurance policies cover legal services, forensic services, business interruption expense, as well as expense stemming from cyber extortion and cyber terrorism.

Some state laws require law enforcement be notified in the event of a theft. This may trigger news media inquiries. If the media focus on a data breach, news reports may affect the firm's public image and reputation. In such situations, a crisis

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## DATA SECURITY BREACH

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management or public relations firm may help to control communications and protect the firm's reputation.

Credit monitoring services and identity theft education and assistance services are also recommended. Cyber liability or data breach insurance will often cover expenses stemming from those services as well. Breach response services are sometimes included in a cyber-liability insurance program.

### 4) Activate the firm's incident

**response plan.** If the firm is prepared, it will have an incident response plan in place to manage a breach. The best time to plan for an emergency is before it happens. The worst time to figure out how to respond to a crisis is while it is happening. An effective plan will help the firm:

- quickly and efficiently recover from security incidents,
- respond in a systematic manner to incidents and carry out all necessary steps to correctly handle an incident,
- prevent or minimize disruption of critical information systems,
- minimize loss or theft of sensitive or

critical information,

- ensure that firm resources are used wisely and efficiently, and
- govern the flow of communications among the stakeholders (internal) and other organizations (e.g., insurance companies and law enforcement agencies).

Outline the basic steps of the plan by establishing checklists and clear action items. Immediately upon discovery of a cyber incident, the following questions usually arise:

- What happened?
- What data was affected?
- How many individuals were affected?
- Is there a legal obligation to notify? (Consult with the firm's attorney.)
- Should the affected individuals be notified immediately?
- Who needs to be notified? Business partners? Law enforcement or regulatory agencies?

If the firm has not yet prepared an incident response plan, assign individuals to be responsible for preparing a plan. They should be able to recruit others to a response team if necessary. Team members need to know where client and personal information is stored. Inbound and outbound sources

of information, and all methods of communicating such information, should be addressed by the plan.

An incident response plan should be part of a broader information security program that satisfies the provisions of state and federal regulations. Some state regulations require such programs to be in writing. One advantage to having a written security program is that it can be taught to staff to ensure that each employee knows the firm's expectations and what he or she is required to do, including best practices for addressing new and continuing risks (e.g., social engineering, phishing and web application attacks). Update the program to reflect new laws or regulations. Training sessions to update staff on changes will make it a dynamic, living program for the staff.

Several benefits come with a strong information security program. Besides helping to ensure that private information remains confidential and available only to authorized parties, a strong program helps the firm avoid or reduce the high costs associated with data breaches and becomes a powerful selling point appreciated by many clients in this era of heightened security awareness.

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To adapt the next version of the CPA Exam for today's increasingly complex business environment, the AICPA in 2014 launched a practice analysis, a comprehensive research project, to determine the knowledge and skills required for the next version of the Exam. A rigorous and broad research process, the practice analysis includes interviews, focus groups, an invitation to comment, a survey and other research to gather information from boards of accountancy, regulators, firms, educators, state

societies, and CPAs from business and industry who represent the depth and breadth of the profession. This thorough research enabled the AICPA to identify relevant and meaningful ways to evolve the Exam and align it more closely

The next step in the practice analysis is the development of a detailed Exposure Draft – a final proposal for the next version of the Exam – which the AICPA will release in September 2015. Through the Exposure Draft, members of the profession and other stakeholders will have an opportunity to identify any critical issues the research process may not have considered and/or to provide confirmation that the next version of the Exam is on track. The Exposure Draft will have a 90-day comment period.

Feedback from the Exposure Draft will drive the development of the Exam content, structure and design. Changes for the next version of the CPA Exam will be announced in 2016 and then included on the Exam in 2017.

For more details on the practice analysis and information on the overall project, visit [aicpa.org/nextcpaexam](http://aicpa.org/nextcpaexam).

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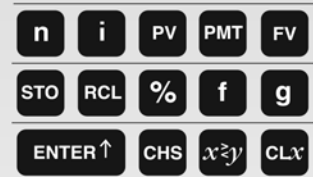
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### LOCAL OIL AND GAS OPERATOR

seeks a CPA: The Company is seeking a CPA interested in working with other professionals at its Ridgeland, MS accounting offices. The full-time position as the Operational Accountant will entail gaining an understanding of oil and gas accounting documents, managing material and equipment transfers, and performing budget to actual reconciliations within our joint interest accounting division. Industry experience is not a pre-requisite. The Company offers excellent benefits and a competitive salary. Email resumes to [krushing@tellusoperating.com](mailto:krushing@tellusoperating.com).

**GRANTHAMPOOLE CPAs** is seeking tax professionals for our Ridgeland office. Successful candidates will have CPA designation or be on CPA track. We offer competitive salary and benefits along with a commitment to our core values and maintaining a work/life balance for our staff. Please send resumes to [llister@granthampooles.com](mailto:llister@granthampooles.com). For more information about our company, please visit our website [www.granthampooles.com](http://www.granthampooles.com).

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**TAX ACCOUNTANT** needed for Flowood CPA firm. At least 3 years tax prep experience. Full time, some flexibility. Send resumes to [Michele@huffmanandcompanycpa.com](mailto:Michele@huffmanandcompanycpa.com)

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