

Rick Bedwell Outstanding Educator

Rick Bedwell, accounting instructor and chair of the Business and Technology Division at Jones County Junior College, has been named the 2017 MSCPA Outstanding Educator and will be recognized during the Business Meeting at the Annual Convention at Sandestin Golf and Beach Resort in Destin on Saturday, June 24. The Petal resident and JCJC alumni is only the second community/junior college instructor in the 29-year history of the award to be selected for this honor.



Rick Bedwell

Southern Mississippi and earned numerous honors including Phi Theta Kappa honor society's Gold Key recipient, PTK Regional Most Distinguished Student, and he served as the PTK President along with earning Who's Who and Hall of Fame honors. He continues to be the advisor for the Southern Christian Student Center at USM.

During his more than 19 years teaching at Jones, he has also owned and still operates Rick's Rehab spending his free time restoring and repurposing antiques and furniture. He has prior public accounting experience with Topp McWhorter Harvey, PLLC and serves the MSCPA on the Awards, Education & Scholarships Committee.

Bedwell's list of service provided to the JCJC community and students demonstrates a breadth of service and investment of time in all areas of campus life, together with confidence in and respect for him by other campus leaders. JCJC is accredited by the Accreditation Council for Business Schools & Programs, and is the only junior (or community) college in the state to achieve this honor. He is the site visit primary contact and lead preparer of the accreditation report. In addition to being the lead accounting instructor, Bedwell is also co-director of the Campus Withdrawal Recovery Initiative and chairs the Student Affairs Disciplinary Committee. Other responsibilities include Gold Key Nominating Committee, Spring Graduate Honors Breakfast Committee, Alpha Beta Gamma advisor, and FBLA Competition event coordinator. He is also a member of the Teachers of Accounting at Two-Year Colleges' organization. His students are well prepared when they depart JCJC and consistently speak of how he has inspired and encouraged them as a professional mentor and guide well beyond their technical knowledge in the classroom.

Bedwell graduated from JCJC in 1992 as a non-traditional student following a career in the automotive business. He also received his Bachelor of Science in Business Administration and Masters of Professional Accountancy from the University of

Olivia Host Public Service Award Winner

Olivia B. Host, Partner at BKD, has been selected as the 2017 MSCPA Public Service Award Winner and will be recognized during the Annual Business Meeting on Saturday, June 24 at Sandestin Golf and Beach Resort.

Host has a distinguished record of personal commitment to her clients as



Olivia Host

well as to the community working with charitable and civic organizations viewed as her responsibility as a professional to be a good citizen. Her example of commitment to community service includes getting others involved as well.

Host serves as a board member for the Mississippi Children's Museum and the Mississippi Symphony League, and most recently on the steering committee for the Friends of Children's Hospital, a non-profit group dedicated to raising money for Blair E. Batson Children's Hospital. She is also on

continued on page 2

Josh Norris Rising Star

Josh Norris has been named the 2017 MSCPA Rising Star and will be recognized during the Business Meeting at the Annual Convention on Saturday, June 24.

The Rising Star Award, established in 2014 by the Board of Governors, recognizes an outstanding young CPA in Mississippi age 40 or under who has demonstrated exemplary leadership skills and involvement in the MSCPA, the Young CPA Network, the accounting profession and the community.

Norris graduated from the University of Mississippi with degrees in both accounting and international studies. During his studies, he



Josh Norris

continued on page 3

IN MEMORIAM

DEBORAH SHEA SUTHERLAND

Madison

Died May 20, 2017



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to the

EDUCATION FOUNDATION

in honor of

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Jackson

for exemplary commitment
to the profession

By

Hugh J. Parker, CPA

Ridgeland



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306 Southampton Row
The Commons
Highland Colony Parkway
Ridgeland, MS 39157
PHONE: (601) 856-4244
FAX: (601) 856-8255
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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.

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OLIVIA HOST

continued from page 1

the board of trustees for the Metro Jackson Habitat for Humanity and is hands on with the service displaying her carpentry skills. Host has been involved extensively with the Junior League of Jackson having served as Treasurer and in many leadership roles on various community projects. She has served on the Executive Leadership team for the American Heart Association's annual Heart

Ball and has been recognized as a Woman of Distinction by the Girl Scouts of Greater Mississippi. She was involved in many roles at Madison Ridgeland Academy over the years including director and past President of the board of trustees.

Host is a summa cum laude graduate of the University of South Alabama, Mobile, with a B.S. degree in accounting. She has more than 27 years of public tax accounting experience with extensive experience in tax planning and compliance.

JOSH NORRIS

continued from page 1

was part of the Barksdale Honors College and Croft International Institute. As part of the requirements for both academic entities, he completed a thesis and his unique course of study qualified him to be selected to the prestigious Phi Beta Kappa. Norris was the first accounting major at the University of Mississippi to qualify for this distinction. After graduating, he began his working career with Ernst & Young in Memphis.

In 2010, he moved back to his hometown where he worked for Richard L. Corken, CPA, P.A. for a year before purchasing the firm and renaming it Corken & Norris. He applied and was accepted in the first class of New York University's Master of Studies in Law and Taxation in 2014. The program is part of the nation's top-ranked law school in tax and is for experienced Certified Public Accountants and economists. He is pursuing the degree while working full time and his anticipated graduation is 2019.

In 2015, Norris created LeFleur Financial, a fee-only financial planning

firm, which allows him to provide more extensive financial services to his clients. Norris operates both his tax practice, Corken & Norris, as a CPA, and his financial planning firm, LeFleur Financial, as a CFP from his office in Fondren.

Norris has been active in the MSCPA serving on the Legislation Committee, Board of Governors as the Central Chapter representative and as the State Board Advisory Committee millennial chair, and the Young CPA Network Events Committee. He is also a graduate of the AICPA Leadership Academy and the Next Generation Leadership Institute.

Norris serves the community as Treasurer and Elder at Grace City Church and participates annually in their mission to Cambodia to work with Hard Places Ministry. He also volunteers with Dining Against Darkness in support of Hard Places Ministry and is a board member for Volunteer Greater Jackson, part of the Jackson Chamber's 2020 initiative. Norris is also a board member for the Phoenix Club, which raises money for the Boys and Girls Club of Central Mississippi.

Southwest Chapter Donates \$500 to MSCPA Education Foundation



The MSCPA Southwest Chapter presented a \$500 contribution to the MSCPA Education Foundation to benefit the scholarship fund. Presentation was made at the Chapter's June 8 reception at Bowie's Tavern in Natchez. MSCPA Chairman Charles Prince (left) and MSCPA President/CEO Karen Moody (right) received the check from MSCPA Southwest Chapter President Lauren Middleton (middle).

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Member News

HORNE LLP, one of the nation's top 50 accounting and business advisory firms, announced the election of **Joel Bobo, CPA, and John Scott, CPA**, to HORNE's Board of Directors.

Bobo, also elected to serve as the chair of the board, is the partner in charge of construction services where he provides assurance and advisory services to large privately owned companies. He also serves on HORNE's technology steering committee and as a financial advisor to several other boards across the state. Bobo joined the firm in 1992 and has more than 35 years of public accounting experience including specific knowledge of construction, nonprofits and small businesses. He earned a Bachelor of Accountancy from the University of Mississippi.

Scott is a partner in tax services and joined the firm in 2002. He has more than 25 years of public accounting experience serving as a tax advisor to corporate, flow-through and individual clients. He has participated in providing value-added tax services to clients including: tax compliance and planning, state and local tax restructuring, IRS practice, acquisition planning and structuring of transactions. Scott applies his specific knowledge of banking, manufacturing, agribusiness, retailing, real estate, telecommunications, and insurance to bring solutions to his clients. Scott received his Bachelor of Accountancy from Mississippi State University.



Joel Bobo



John Scott

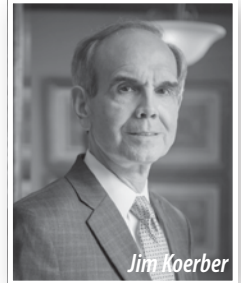
Dr. Dale Flesher, CPA, Professor of Accountancy at the University of Mississippi, has been named as a recipient of the 2017 SEC Faculty Achievement Award. Now in their sixth year, these awards honor

one individual from each SEC university who has excelled in teaching, research and scholarship. The 14 highly accomplished scholars represent more than 14,000 full-time, tenured professors in the SEC Conference. Dr. Flesher is Associate Dean in the Patterson School of Accountancy and holds the Roland and Sheryl Burns Endowed Chair in Accountancy at the University of Mississippi. He has taught at Ole Miss for 40 years. Dr. Flesher has authored more than 400 articles for more than 130 journals, including *The Accounting Review*, *Journal of Accountancy*, *Internal Auditor*, and *Accounting Historians Journal*. In 1996, he served on a task force coordinating the centennial celebration of the CPA examination and served on the AICPA 125th anniversary task force. Dr. Flesher was selected by the MSCPA as the 1998 Outstanding Educator, and was later selected by the AICPA as the nation's 2011 Outstanding Accounting Educator. He also received the 2011 Distinguished Research and Creative Achievement Award from Ole Miss, which is a lifetime achievement award.



Dr. Dale Flesher

The American Institute of CPAs' June 2017 edition of the *Journal of Accountancy* featured an article about **Jim Koerber, CPA/ABV/CFE, CVA** and his niche CPA practice. Koerber is a shareholder in The Koerber Company, PA, which is located in Hattiesburg and limits its work to business valuation and litigation support services.



Jim Koerber

Travis Mitchell, CPA recently joined the audit division of the CPA firm of Haddox Reid Eubank Betts PLLC. He is a graduate of the University of Southern Mississippi where he received his Bachelor of Science in Business Administration in December of 2006 with majors in Accounting and Human Resource Management. Travis is licensed in Mississippi and Texas with six years of experience in public accounting and five years of experience in the mental healthcare industry.



Travis Mitchell

Dues Notices in the Mail Next Month

Dues notices for MSCPA membership year July 1, 2017 through June 30, 2018 go in the mail in July to the 2,700 members of the Society. Payment is due upon receipt of the statement. Dues not paid by October 1 are past due and must include a \$25.00 late fee.

Members are now able to pay for dues online. Go to <https://www.ms-cpa.org/> and login with your email and password. Then go to the Pay Dues page (under Members) to pay your dues for 2017-2018. If you need to change your billing class,

please contact Stephanie Edwards, MSCPA Director of Finance, at 601-856-4244.

The MSCPA launched a brand new website in April 2017. MSCPA members with an e-mail can recover their account using the "forgot password" tool. If you did not have an e-mail associated with your MSCPA profile, please give us a call at 61-856-4244 for assistance.

Firm admins can also print or pay your firm employees dues. Contact Jennie Truhett, jtruhett@ms-cpa.org to be added as a firm admin.

2017 Legislation Report

After a big 2016 offensive session, the 2017 Legislative Session was highlighted by successful defense. Mississippi Society of CPAs Chairman Charles Prince, Legislative Committee Chair Linda Keng, Legislation Committee Millennial Chairman Matt Bailey, and MSCPA President/CEO Karen Moody worked with The Clay Firm to protect our profession during the 90 day Legislative Session.

Errors and Omissions Insurance Coverage Bill Killed Again

House Bill 243 as introduced by Representative Mark Formby would have required every firm engaging in the practice of public accounting in the state to carry errors and omissions insurance coverage in an amount of at least \$100,000 per occurrence that covers every person associated or registered with a firm engaging in the practice of public

accounting in the State of Mississippi. In addition, the Mississippi State Board of Public Accountancy was given the charge to adopt and enforce rules and regulations requiring proof of this coverage. Naturally, we went to work to try to amend or kill this legislation. We were successful in amending the bill in the House Insurance Committee by exempting certified public accountants from the proposed legislation. However, the Board would have still been required to enforce, even though this would not have been in their jurisdiction. Thankfully, we were able to kill House Bill 243 in the Senate Insurance Committee at the committee deadline period without bringing the bill up for a vote.

New Law and Order for Licensing Boards

The other major piece of legislation that held our focus all of the 2017

Legislative Session was House Bill 1425, the Occupational Board Compliance Act. The genesis of HB 1425 comes to us from a U.S. Supreme Court decision against the North Carolina Board of Dentistry. Briefly, the Board of Dentistry in North Carolina ruled that teeth whitening services was an act of dentistry. However, their enabling legislation did not mention teeth whitening. Regardless, after dentists complained to the Board that non-dentists were charging lower prices for such services than dentists, the Board of Dentistry issued 47 cease and desist letters advising these non-dentists providing the services that they were committing a crime. In response, the Federal Trade Commission filed suit against the North Carolina Board of Dentistry. Ultimately, the case appeared before the U.S. Supreme Court. The Supreme Court effectively ruled that the Dentistry Board

continued on page 7



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LEGISLATION

continued from page 6

exceeded their authority. However, more importantly, the Court held “When a controlling number of the decision makers on a state licensing board are active participants in the occupation the board regulates, the board can invoke state-action immunity only if it is subject to active supervision by the state.”

HB 1425, as passed the House, would have required all occupational boards to submit all rules and regulations, as well as disciplinary actions, to the Governor for approval, amendment or veto. We were able to successfully amend the bill to take disciplinary actions out of the bill. In addition, instead of the Governor being the active supervisor, a Commission was created made up of the Governor, Attorney General and Secretary of State to act as the active supervisor. The summary of the bill is below:

- HB 1425 creates the Occupational Licensing Review Commission which shall be composed of the Governor, the Secretary of State and the Attorney General, or his or her respective designee.
- The commission shall be responsible for the active supervision of state executive branch occupational licensing boards controlled by active market participants to ensure compliance with state policy in the adoption of an occupational regulation promulgated by an occupational licensing board. The active supervision required under this act shall not extend to individual disciplinary actions taken or imposed by an occupational licensing board as to any active market participant subject to the jurisdiction of the occupational licensing board.
- An occupational licensing board must submit any proposed occupational regulation to the commission before the occupational licensing board may file the occupational regulation in the Office of the Secretary of State if the occupational regulation is required to be filed in the Office of the Secretary of State by Chapter 43, Title 25, Mississippi Code of 1972, (Mississippi Administrative Procedures Law), or before the occupational regulation becomes effective if filing is not required.
- The commission shall issue resolutions

necessary to effectuate the provisions of this act, including the process, procedures and timelines that will govern any submission filed in accordance with the act. Nothing in this act shall be interpreted to subject the commission to any of the administrative procedures of Chapter 43, Title 25, Mississippi Code of 1972, (Mississippi Administrative Procedures Law).

- The Commission shall review the substance of the occupational regulation proposed by any occupational licensing board; and approve, disapprove, disapprove with suggested amendment or allow the occupational licensing board to withdraw for revision of such occupational regulation to ensure compliance with state policy.
- The provisions of the bill shall not apply to occupational licensing boards that are not controlled by active market participants. The term “active market participant,” in addition to other terms, is defined in the bill.
- Effective date is July 1, 2017.

Change in Tax Return Revision and Sales Tax Assessment Law

House Bill 686 signed into law on March 13 and is effective January 1, 2017. This bill authorizes a taxpayer to:

- Request a revision of an income tax return at any time within three years from the due date, or if an extension of time to file was granted, three years from the date the return was filed. If the return is not filed by the time authorized by the extension, then the three years begins to run from the final day of the extension period.
- Request a revision of the sales tax assessed against him or her, or paid by him or her, within 36 months from the date of the assessment or from the date the return was filed.

Procurement Law Changes

House Bill 1109 was signed into law March 29 and is effective January 1, 2018. Effective 1/1/18.

HB 1109 creates standards for procurements by the solicitation of requests for proposals or requests for qualifications and provides that the standards shall apply to procurements by state agencies of commodities, supplies, equipment, construction, technology, personal and professional services, any type of state

agency employee benefits and state agency supplemental insurance and cafeteria plans.

Additionally, the bill provides the factors that must be considered when determining to use a request for proposals or requests for qualifications, the content to include in a request for proposals or request for qualifications, the requirements of pre-proposal conferences, the method to properly draft a request for proposals or request for qualifications, the evaluation factors to use when reviewing a request for proposals or requests for qualifications, the qualifications of the evaluation committee that will evaluate each submitted proposal or qualification, the guidelines for discussions once proposals or qualifications have been submitted and the content to be included in the best and final offer.

In addition, the bill provides for the following:

- Amends Section 25-9-120 to abolish the Personal Service Contract Review Board and to provide that the powers, duties and all resources of the Personal Service Contract Review Board shall be transferred to the Public Procurement Review Board.
- Amends Section 27-104-7 to reconstitute the Public Procurement Review Board in order to include the powers and duties of the Personal Service Contract Review Board under the purview of the Public Procurement Review Board.
- Amends Section 31-7-13 to require reverse auctions to be the primary method for receiving bids during the competitive bidding process and to require the Public Procurement Review Board to approve a purchasing entity's decision to use a method other than reverse auction for soliciting bids.
- Amends Section 25-61-9 to require anyone seeking a protective order for certain contract information otherwise required to be public under the Public Records Act to post notice of the petition and the reasons for the protective order on the Mississippi Procurement Portal for a minimum of seven days before filing the petition for the protective order in chancery court.

MSCPA Offers Special Discounts for Members

As a member of the only statewide organization for CPAs in Mississippi, you have access to an array of member benefits including discounts on quality CPE, networking and leadership opportunities, and special discounts to help you make the most of your profession.

MSCPA Introduces New Partner



MSCPA has recently added a new referral partner: CPACHarge.

CPACHarge is an online payment technology trusted by more than 40,000 professional offices. Designed specifically for the accounting industry, CPACHarge provides a simple, secure, and cost-effective way to incorporate online payments into your practice. And, with advanced reporting that includes complete charge and deposit details, credit card reconciliation is a breeze.

We are excited to present CPACHarge as a new member benefit for members of the Mississippi Society of CPAs.

Any member of the Mississippi Society of CPAs who signs up for a CPACHarge account by July 31 will receive their first three months free! To learn more, call (844) 352-4705 or visit cpacharge.com/ms-cpa/.

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Office Depot now offers access to our store purchasing card on your mobile phone, saving members on everyday office supplies. Text "MSCPAPC" to 555-888 to get a store purchasing card to save on your phone.

Now through September 30, MSCPA members can purchase copy paper online for \$24.99 per case (enter 460-196-517 to receive special pricing).

Members can see a complete list of the special discounts for members on our new website. Visit <https://www.ms-cpa.org/> and log in with your email and password to view the Member Benefits & Discounts page under Members on the website.



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YOUNG CPA NETWORK

WHAT IS THE YOUNG CPA NETWORK?

It's a group designed to help young MSCPA members establish connections with other aspiring professionals, exchange ideas and grow in their careers. Network discussions are geared toward professionals ages 22 to 35, or those within the first 5 years of becoming a CPA.

WHY SHOULD I GET INVOLVED?

The Young CPA Network will put you on the fast track to becoming a leader with the MSCPA. Volunteer positions with the Young CPA Network include Board of Directors, Events Committee, Communications Committee and Conference Committee. The Young CPA Network hosts social events and a Young CPA Conference for CPE credits each year allowing members to connect with peers. The Network also takes an active role in promoting the CPA profession among students.

HOW DO I JOIN?

First complete a MSCPA membership application to join the Mississippi Society of CPAs and take advantage of our member benefits including discounts on CPE classes. Then email msyoungcpa@ms-cpa.org to get involved.



MSCPA would like to thank our Annual Convention Sponsors and Exhibitors

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Committee Day & Leadership Luncheon

MSCPA Committees met Thursday, May 11 for Committee Day at the MSCPA Training Center to plan their programs of work for the new fiscal year.

MSCPA also hosted the 4th Annual Leadership Luncheon in conjunction with Committee Day for incoming/outgoing

Committee Chairmen, incoming/outgoing Millennial Chairmen, AICPA Council Representative, candidates for office this year, MSCPA officers, and Young CPA Network officers. Guest speaker was Randy Pierce, CPA, JD, Director of the Mississippi Judicial College and former Mississippi Supreme Court Justice.



COMMITTEE DAY

continued from page 10



Accounting and Auditing Conference

MSCPA's Accounting and Auditing Committee hosted the annual Accounting and Auditing Conference Wednesday, May 10, with Brown & Brown Insurance exhibiting. Attendees heard from speakers Michael Brand, Thomas Riley, Kendall Blaylock and Megan Hudson.



Hot Topics in Industry: A Program for Management Development

MSCPA's Industry Committee hosted the annual Hot Topics in Industry: A Program for Management Development May 17-18. Attendees heard from speakers Steve Sanders, Alex Purvis, Wendy Mullins, Anna Morris, Guy McClain, Wil Crawford, and Chris Webb.

Technology Conference

MSCPA held our annual Technology Conference at the Embassy Suites in Ridgeland, May 22-23, with Paychex exhibiting. Attendees heard from speakers Randolph Johnston, Larry McClelland, and Val Steed.



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Chapter Events: Southwest Chapter

The MSCPA Southwest Chapter hosted a meeting and a reception June 9 at the historic Bowie's Tavern in Natchez.

Top left photo: New Southwest Chapter officers for 2017-2019 were elected. Ryan Wingfield, President (third from left); Carr Hammond, Vice-President (second from left); and Caitlin Goodman, Secretary/Treasurer (not pictured). Also in attendance was Lauren Middleton, 2015-2017 Chapter President (left); Charles Prince, MSCPA Chairman (fourth from left); and Karen Moody, MSCPA President/CEO (right).



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New Website Features for MSCPA Chapters

As part of our continued commitment to ensuring that our members receive the tools and benefits they need to succeed in our industry, the MSCPA launched a brand new website in April.

Chapter information can now be found on each Chapter page. Go to <https://www.ms-cpa.org/> and login with your email and password. Then go to the Chapter page (under Members) to find your chapter. Each chapter page now includes a listing of

counties served as well as chapter leadership with contact information and a photo album of chapter events. Here you will also be able to find upcoming chapter events and regional MSCPA CPE events.

New chapter leadership, photos and events can be emailed to Jennie Truhett, MSCPA Director of Marketing and Communications, at jtruhett@ms-cpa.org to be added to your chapter page.

MSPCA Banking and Finance Conference

Tuesday, August 22
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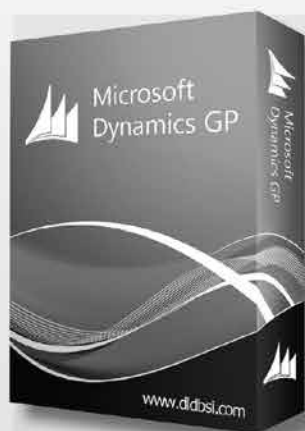
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Cell: 501.514.4928
Kathy@AccountingBizBrokers.com

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JUNE-SEPT. 2017 CPE COURSE INFORMATION

6/26/2017

Monday

Ridgeland

MSCPA Center

Employment Law Update: Key Risks and Recent Trends

Discussion Leader: William F. (Bill) Taylor, CPA

Cost: Members: \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30

Course Hours: 8:30-4:30

Level: Advanced **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** LAWU

Course objectives and description: Businesses and non-profits today face an explosion of EEOC actions and employment litigation that can threaten the organization's financial stability as well as its reputation. This course will update you on, and provide tips about mitigating exposure for, the key employment risks that every employer faces: cyber issues such as social media, device and internet use, wrongful termination, retaliation, whistleblowers, all types of discrimination and harassment, workplace safety, wage and hour laws, immigration issues, laws such as the FMLA, ADA, HIPAA, COBRA, FLSA, and more. Know how to react to developing employment issues, understand recent trends in employment claims, and arm yourself with the knowledge and assessment tools that can make a difference for your employer or your clients.

6/26/2017

Monday

Ridgeland

Holmes CC

Valuing a Business: What is this Company Worth?

Discussion Leader: Don Minges

Cost: Members: \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0

Course Hours: 8:30-12

Level: Intermediate **CPE Credit:** 4 A&A **VENDOR:** Executive Ed **ACRONYM:** VAB

Course objectives and description: What is your company worth? Is business value the single most important metric? This session discusses various business valuation methods for any stage company: start-up, spin-off, or acquisition. Many valuation methods exist. Which method is right? Which is the 'best' for a given business or a given situation? CPAs and Corporate Financial Managers cannot afford to miss this course.

6/26/2017

Monday

Ridgeland

Holmes CC

How Good Companies Become Great: Secrets to Success

Discussion Leader: Don Minges

Cost: Members: \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0

Course Hours: 1:00-4:30

Level: Intermediate **CPE Credit:** 4 A&A **VENDOR:** Executive Ed **ACRONYM:** GTG

Course objectives and description: Some companies are "born" great, others change and become great along the way. This seminar will discuss how both new companies and established companies become great. This seminar benchmarks world class companies to understand the underlying principles that made them great. The seminar begins with key lessons about business start-ups from Paul Hawken, author of "Growing a Business", and Guy Kawasaki, author of "Art of the Start" and "Enchantment". Next, the seminar looks at research on existing businesses, beginning with the management classic "In Search of Excellence" and then focusing on Jim Collins' research presented in "Built to Last", "Good to Great", "How the Mighty Fall" and "Great by Choice". Learn how your organization can make the transition from being merely good to truly great.

6/27/2017

Tuesday

Ridgeland

Holmes CC

Predicting the Future: Create the Best Projections You Can

Discussion Leader: Don Minges

Cost: Members: \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$0

Course Hours: 8:30-4:30

Level: Intermediate **CPE Credit:** 8 A&A **VENDOR:** Executive Ed **ACRONYM:** PTF

Course objectives and description: We all make predictions in our personal and professional lives. We base our decisions to marry, buy a house, launch a new product or hire staff on expectations about the future. How we can use best practices and current research to improve our ability to predict the future? We will examine current best practices in forecasting to help us prepare better budgets and projections. We will also examine budgeting pitfalls and ways to avoid budget traps. We will discuss the risks that cause actual results to vary from our predictions and discuss methods to deal with both known and unknown risks.

6/27/2017

Tuesday

Ridgeland

MSCPA Center

Leases: Mastering the New FASB Requirements

Discussion Leader: Thomas Sheets

Cost: Members: \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30

Course Hours: 8:30-4:30

Level: Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** LEAS-2

Course objectives and description: How do the leasing requirements in the new standard differ from current GAAP? This course addresses that question by examining the core principles of the new standard, including identification, recognition, measurement, presentation and

disclosure requirements. Examples are included to illustrate application of the new standard. This course explains the lessee accounting model, including lease classification, amortization of the right-of-use asset, and interest on the lease liability. This course also explains the lessor accounting model, including transfer of risk, profit recognition, and collectability. Additional topics include short-term leases, purchase options, variable lease payments, and sale and leaseback transactions.

6/28/2017

Wednesday
Ridgeland
Holmes CC

Governmental and Not-for-Profit Annual Update

Discussion Leader: Melisa Galasso

Cost: Members: \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30

Course Hours: 8:30-4:30

Level: Update **CPE Credit:** 8 A&A/YB **VENDOR:** AICPA **ACRONYM:** GNAU-2

Course objectives and description: Change is inevitable and at times overwhelming if you are unprepared. Ensure you are current in governmental and not-for-profit accounting and auditing. This update course is designed to prepare you for the latest accounting and auditing developments affecting governments and not-for-profits.

6/28/2017

Wednesday
Ridgeland
MSCPA Center

Revenue Recognition: Mastering the New FASB Requirements

Discussion Leader: Thomas Sheets

Cost: Members: \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30

Course Hours: 8:30-4:30

Level: Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** INRR

Course objectives and description: The effective date of the new accounting standard for revenue recognition is fast approaching! With the issuance of FASB ASU No. 2014-09, Revenue from Contracts with Customers, FASB has completed a convergence project with the IASB to improve financial reporting by creating common revenue recognition guidance for U.S. GAAP and IFRS. For years, revenue recognition has been the cause of audit failures and the focus of corporate abuse and fraud allegations. This course will provide you with an in-depth understanding of the framework for revenue recognition built around the core principle that is applied in a five step process. In addition, understanding the changes and new requirements is critical for successful implementation of this new standard. Supported by practical examples, this course will assist you in avoiding revenue recognition traps and provide you with latest FASB guidance. In addition, you will understand how the new guidance impacts certain industries as a result of new criteria for recognizing revenue and changes in disclosure requirements.

6/29/2017

Thursday
Ridgeland
Holmes CC

Technology for CPAs: Don't Get Left Behind

Discussion Leader:

Cost: Members: \$275 **Non-Members:** \$345 **AICPA Member Discount:** \$0

Course Hours: 8:30-4:30

Level: Intermediate **CPE Credit:** 8 General **VENDOR:** K2 Enterprises **ACRONYM:** TEC

Course objectives and description: How good are you with the technology you use daily? What new technology tools are available that could save you time and make you more effective? Technology continues to accelerate rapidly, and the need to keep pace is important. If you are not an information technology (IT) expert, but need a technology update to maintain and improve your skills so that you can serve your companies and/or clients more efficiently and effectively, then this course is for you! In this fast-paced, update-style course, you will survey today's IT environment, learning about computer hardware, software (including Office 2016), operating systems (including Windows 10) and what they mean for you, and peripheral devices. You will also learn about significant trends in information technology and how to take advantage of the opportunities presented by these trends. Examples include the latest Excel features, working with PDF files, and security and privacy issues. Additionally, you will learn how to improve the overall performance of your IT investment, thereby increasing your return on investment. Throughout this program, you will learn from real-time demonstrations of practical applications of the latest tools which can provide you with knowledge you need to harness the power of technology, both now and in the future. Register now for this "don't miss" opportunity to get the skills needed to enhance the value of your IT investment. "One of the best IT courses offered." R.O., CPA MS "Extraordinary amount of information and resources provided – very good seminar." A.M., CPA NJ For more details, please visit www.k2e.com/tec.

6/29/2017

Thursday
Ridgeland
MSCPA Center

Form 1041: Income Taxation of Estates and Trusts

Discussion Leader: Stephen Renberg

Cost: Members: \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30

Course Hours: 8:30-4:30

Level: Basic **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** ITET

Course objectives and description: Protect your clients' assets and shield their estates from increased taxation brought about by the changing tax code. Understand the tax obligations of trusts and estates and how these obligations affect beneficiaries. This course provides exercises and examples that reflect the calculation and allocation of taxable income and its presentation on the appropriate forms. You will also learn how to prepare Federal Form 1041 and the accompanying schedules.

6/30/2017Friday
Ridgeland
MSCPA Center**Income and Expense Recognition Strategies to Minimize Income Taxes****Discussion Leader:** Stephen Renberg**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30**Course Hours:** 8:30-4:30**Level:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** INCT

Course objectives and description: While characterization (identifying ordinary income, capital gain, exempt income, deductible expenses, etc.) understandably plays a central role in tax practice, timing issues (when an item is reflected on the tax return) are just as important. Since tax planning often involves deferral rather than exclusion, a solid understanding of income tax accounting rules is essential to maximizing tax benefits and minimizing tax costs. Practitioners are confronted with federal income tax accounting rules that differ substantially from GAAP and mastering those rules is key to adequately advising clients with respect to both compliance and planning opportunities. This course will address the application of a broad spectrum of tax accounting principles every practitioner should know.

6/30/2017Friday
Ridgeland
Holmes CC**K2's Business Intelligence, Featuring Microsoft's Power BI Tools****Discussion Leader:****Cost: Members:** \$275 **Non-Members:** \$345 **AICPA Member Discount:** \$0**Course Hours:** 8:30-4:30**Level:** Advanced **CPE Credit:** 8 General **VENDOR:** K2 Enterprises **ACRONYM:** BIN

Course objectives and description: New Course for 2017! In today's business climate, Business Intelligence (BI) is perhaps the hottest topic in most professional circles. Increasingly, organizations of all sizes are seeking to take advantage of the data that is available to them to identify previously undiscovered insights and gain competitive advantages thought to be out-of-reach just a few short years ago. A growing array of tools – ranging from Excel add-ins to dedicated solutions such as Power BI – now allow you to leverage your existing knowledge and skills to create powerful, interactive dashboards and analyses unthinkable until recently. In this program, you will learn how to implement “do it yourself business intelligence” using a variety of techniques and tools. You will learn how to work with some of the advanced data query and summarization features in Excel to create Excel-based dashboards and then you will learn how to leverage that knowledge to build even more powerful BI objects using Microsoft's Power BI tools. If gaining greater insights into your data to make better decisions is of interest to you, then join us for a fast-paced look at how you can take advantage of these fantastic tools. For more details, please visit www.k2e.com/bin.

8/10/2017Thursday
Ridgeland
MSCPA Center**A+ College Savings Planning: Maximizing Resources and Tax Benefits****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$0**Course Hours:** 8:30-12**Level:** Basic **CPE Credit:** 4 Tax **VENDOR:** SURGENT **ACRONYM:** CSP4

Course objectives and description: For many families, planning for college education savings begins right after counting fingers and toes in the delivery room. For others it may creep up (and require some catch up) during the middle or high school years, and for still others it starts the day the first tuition bill arrives. Regardless of when the planning process starts and what the available assets are, CPAs can deliver value to their clients (and their own families) through effective application of all the available savings and funding vehicles as well as tax minimizing strategies. In this session we will survey the tools available and show you how to make the most of them.

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8/10/2017Thursday
Ridgeland
MSCPA Center**Maximizing Your Social Security Benefits****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$0**Course Hours:** 1:00-4:30**Level:** Basic **CPE Credit:** 4 Tax **VENDOR:** SURGENT **ACRONYM:** SSR4

Course objectives and description: The leading edge of the baby boomer generation has already reached retirement age. Financial and tax planners can expect increased demand for strategies that dovetail Social Security with other retirement- and estate-planning objectives. This course provides tax and financial planning professionals with both the background information on the Social Security system and the strategies clients will need in dealing with Social Security and all the other myriad of related retirement planning issues.

8/17/2017Thursday-Friday
Jackson
Hilton**Governmental Accounting and Auditing Conference****Discussion Leader:** Panel**Cost: Members:** \$280 **Non-Members:** \$380 **AICPA Member Discount:** \$0**Course Hours:** 8:30-4:30**Level:** Update **CPE Credit:** 16 A&A/YB **VENDOR:** SELF **ACRONYM:** GAAC

Course objectives and description: This two-day event for government accountants will provide the crucial guidance you need to stay in compliance with the many A&A rules affecting your practice, business or clients. This conference qualifies for Yellow Book. Visit the MSCPA website at www.ms-cpa.org for a complete conference agenda.

8/22/2017Tuesday
Jackson
Hilton**Banking and Finance Conference****Discussion Leader:** Panel**Cost: Members:** \$200 **Non-Members:** \$275 **AICPA Member Discount:** \$0**Course Hours:** 8:30-4:30**Level:** Update **CPE Credit:** 8 A&A **VENDOR:** SELF **ACRONYM:** BANK

Course objectives and description: As the date for this event approaches, please access the MSCPA web site for details and registration information on this conference. www.ms-cpa.org

9/20/2017Wednesday
Ridgeland
MSCPA Center**Ethics, Rules, and Regulations****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0**Course Hours:** 8:30-12**Level:** Update **CPE Credit:** 4 Ethics **VENDOR:** SELF **ACRONYM:** ERR-4

Course objectives and description: This seminar satisfies the State Board's requirement for three hours of general ethics and one hour of Mississippi Rules and Regulations.

9/20/2017Wednesday
Ridgeland
MSCPA Center**Hot Tax Planning Developments Under the Current Tax Law****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0**Course Hours:** 1:00-4:30**Level:** Intermediate **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4HOT

Course objectives and description: Are you up-to-date on the latest tax planning developments for 2016? This course explores the hottest tax planning topics which will impact you and your clients. Discover how these topics may impact tax planning strategies and be in a position to help minimize your client's tax bill.

9/21/2017Thursday
Ridgeland
MSCPA Center**Guide to the New Revenue Recognition Model for All CPAs****Discussion Leader:** Curtis J. Quickel, CPA**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0**Course Hours:** 8:30-12**Level:** Intermediate **CPE Credit:** 4 A&A **VENDOR:** SURGENT **ACRONYM:** REV4

Course objectives and description: Designed for accounting and auditing practitioners at all levels in both public accounting and business and industry, this course provides a thorough review of the FASB's comprehensive new revenue recognition guidance found in ASU No. 2014-09, Revenue from Contracts with Customers. The course begins with a quick overview of the new guidance from 30,000 feet, before diving into the details of the FASB's new 5-step revenue recognition model. Additional guidance, presentation, and disclosures are then covered before the course wraps up with a brief look at changes already being proposed to the new guidance.

9/21/2017

Thursday
Ridgeland
MSCPA Center

More than Meets the Eye: Examining the New Lease Accounting Standard**Discussion Leader:** Curtis J. Quickel, CPA**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0**Course Hours:** 1:00-4:30**Level:** Intermediate **CPE Credit:** 4 A&A **VENDOR:** SURGENT **ACRONYM:** NLS4

Course objectives and description: Implementing ASU No. 2016-02 is sure to have a major impact on your balance sheet - and potentially on your business as well. This course is a one-stop shop for what you need to know about the upcoming changes to lease accounting. In this course, we will review how to measure the lease liability and Right of Use asset that will now be recorded on the balance sheet for all leases. We will also tackle the tricky issues of accounting for lease modifications and other lease remeasurement events, as well as address the other major provisions of the new standard, including transition. We will also review the income statement treatment of lease expense for all leases for both lessees and lessors.

9/22/2017

Friday
Ridgeland
MSCPA Center

Health Care Services Conference**Discussion Leader:** Panel**Cost: Members:** \$220 **Non-Members:** \$295 **AICPA Member Discount:** \$0**Course Hours:** 8:30-4:30**Level:** Update **CPE Credit:** 8 General **VENDOR:** SELF **ACRONYM:** HCSS

Course objectives and description: This event is designed to meet the specific interests of CPAs and financial professionals who provide services to hospitals, physician practices, and long-term care facilities. Visit the MSCPA website at www.ms-cpa.org for a complete agenda.

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