

Candidates for 2021-2022 Officers Announced

The MSCPA Nominations Committee reports the candidates for officers/directors for the 2021-2022 year. The election is scheduled for Saturday, June 26, 2021 during the Annual Business Meeting at Sandestin Golf and Beach Resort, in Destin, Florida. Absentee ballots for members who will be unable to attend the Business Meeting will be available later this spring.

Chairman:

Ricky Bullock, *Tupelo, Nail McKinney*

Vice-Chairman/Chairman-Elect:

Scott Christian, *Natchez, The Gillon Group*

Treasurer:

Wil Crawford, *Madison, BKD*

Secretary:

Shannell Watson, *Jackson, Woodward Hines Education Foundation*

At-Large Board Member:

Linda Keng, *Madison, Jones Walker*

Members of the Nominations Committee include: Donna Bruce-Chairman; Kim Allison-Banisch, Ocean Springs; Charles Byram, Madison; Tony Chance, Forest; Bob Cunningham, Jackson; Carr Hammond, Natchez; and Lydia Windham, Brandon.

MDOR Provides Guidance on Pressing Tax Issues

Due to the numerous questions received from our members regarding the tax treatment of various COVID-related relief provided by Federal and State Governments, MSCPA sent an inquiry to the MS Department of Revenue to request guidance on how MDOR interprets the taxability of such COVID-related relief and whether the related expenses would be deductible. MDOR has responded with their positions on these items as follows:

Taxability of receipts and deductibility of expenses related to COVID relief:

- **PPP Loan Forgiveness** – Legislation was passed last year to make forgiven

loans nontaxable and to allow for the deduction of expenses paid with the loan.

- **EIDL Advances** – MDOR has advised these advances are excluded from income in Section 27-7-15(4)(II), but does not believe there is a provision to allow the deduction of the expenses paid with the EIDL Advances.
- **EIDL loans not becoming part of a PPP loan** – MDOR recognizes EIDL loans would not be income to the taxpayer as they are loan proceeds, and therefore, any expenses paid with these proceeds would be deductible.
- **EIDL loans that become part of a PPP loan and are subsequently forgiven** –

continued on page 7

MEMORIAL GIFT
to the
Education Foundation
in memory of
REV. DR. CHARLES WATSON
Jackson
by
Annette Pridgen
Pearl

2021 MSCPA Convention Agenda Announced

The 2021 MSCPA Annual Convention is June 23-27 at Sandestin Golf and Beach Resort in Destin, Florida with plans to celebrate the 100th anniversary for the MSCPA. MSCPA Chairman Annette Pridgen extends an invitation to all MSCPA members and friends of the Society to attend.

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

Early registrations helps the Society plan for this event more accurately. Please register early! You could win FREE Convention Registration!

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

2. Grand Prize: General Registration fees will be refunded the same way they were paid (credit card or check made payable to original payer). The winner will be selected in a random drawing.

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

Convention details are posted to the Society's webpage at www.ms-cpa.org/education/annual-convention. Convention brochures will also be mailed next month.



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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

ANDREW BODIN

Lightheart, Sanders & Associates
Brookhaven

KRISTEN L. BYRD

Sedgwick CMS
Hernando

LYDIA DIDIA

Jackson State University
Brandon

MALLORY GINN

Southwest MS Regional Medical Center
Tylertown

JONATHAN GUEL

Wright, Ward, Hatten and Guel
Gulfport

MAXWELL SEAGE

MS Office of the State Auditor
Brandon

HORNE Earns Multiple Rankings on Accounting Today's Top 100 Accounting Firms of 2021

HORNE is honored to be recognized by Accounting Today as the No. 2 fastest growing accounting firm in the country and No. 35 overall on its annual list of Top 100 Accounting Firms. The annual list selects the top 100 from 44,000 firms nationwide.

"We are certainly humbled by this recognition," said Executive Partner Joey Havens. "We believe growth is a lagging indicator of success and doing the right things. This extraordinary growth is a direct result of our client's trust in us during uncertain times and we are so grateful for the privilege to serve them. We continue to pursue a strong sense of belonging for every team member and it's their dedication to providing exceptional client service that makes this possible."

Over the last year, HORNE achieved over 58% organic growth by leaning into uncertainty to stay ahead of their clients'



biggest challenges and helped turn those into opportunities.

HORNE is a professional services firm founded on a cornerstone of public accounting. Their 1,500+ team members serve clients in 48 states, Washington D.C., Puerto Rico and the U.S. Virgin Islands from offices and project locations in Alabama, Arkansas, California, Colorado, Florida, Georgia, Kentucky, Louisiana, Mississippi, New Hampshire, New Jersey, New York, North Carolina, Pennsylvania, Puerto Rico, South Carolina, Tennessee, Texas, U.S. Virgin Islands and Washington D.C. HORNE provides anticipatory advice and solutions to find opportunity in change.

The ASCPA Peer Review Program is now Partners in Peer Review

The Alabama Society of CPAs Peer Review Program is excited to announce that it has changed its peer review program name to Partners in Peer Review. The Alabama Society of CPAs transitioned both Arkansas and Mississippi states into its program and incorporated the existing peer review committee members from both states into its Alabama Peer Review Committee in 2019, and since then, it has been a mission to create a new name that encompasses both the combined program as well as the strong partnership that has been established among these states.



Member News

Community Foundation for Mississippi Welcomes Watson to Board of Trustees

Shannell Watson has joined the Community Foundation for Mississippi's Board of Trustees. She is a program officer with the Woodward Hines Education Foundation (WHEF), primarily responsible for managing programmatic activity related to WHEF's statewide postsecondary attainment priorities. Prior to joining WHEF as a financial analyst in 2007, Shanell worked as an assurance supervisor for HORNE LLP and external grant manager for the Jackson Medical Mall Foundation. She has been licensed as a CPA since 2005 and received a Bachelor of Business Administration and Master of Accountancy from Millsaps College's Else School of Management.

Shanell has held a number of community roles, including her current service as Board Chair of the Women's Foundation of Mississippi, where she's also served as Treasurer and Chair-Elect. She is also a governing board member for Mississippi Action for Progress, a head start agency.

Shanell has represented the MSCPA Central Chapter on the Board of Governors and has been a member of the MSCPA Awards, Education, and Scholarships Committee for twelve years. In 2009, she was a member of the inaugural Board and Communications Committee of the MSCPA Young CPA Network and is currently a member of the MSCPA Young CPA Liaison Committee. Shanell is a native of Meridian – she and her husband, Edward, reside in Clinton, with their three sons, Nicholas, Sean and Barrett.



Watson

Bylaws Resolution Presented to Allow for Virtual Annual Meeting

MSCPA Bylaws state that the annual business meeting shall take place during and at the same location as the annual convention. At the December 2020 meeting, the MSCPA Board of Governors approved a resolution to amend the Bylaws to allow the annual business meeting to be held virtually when the annual convention cannot be held as planned. The complete resolution can be found on the MSCPA website (www.ms-cpa.org) under ABOUT. The resolution will be voted on at the annual meeting at Sandestin on June 26.

Volunteer Now for Committee Service

Serving on an MSCPA committee allows you to network with other professionals, gain experience and meet others who work in your field. Committee members work together to accomplish objectives and projects that directly support the MSCPA.

The application process for new committee members for 2021-2022 Committees is now open through April 30. To view a list of active Committees, volunteer for a Committee, and view your Committee service history, go to our website www.ms-cpa.org, login with your email

and password, then go to the Committees page under Members. Chairman-Elect Ricky Bullock will make chair appointments this spring.

Volunteer online at www.ms-cpa.org/membership/committees



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Kathy Brents
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Marvel A. Turner, Sr., Ph.D., CPA

Pioneer in Accounting Regulation

The MSCPA salutes Dr. Marvel A. Turner, Sr., CPA as a pioneer in accounting regulation in the State of Mississippi. He was born in Mound Bayou, Mississippi and received his early education in the Mound Bayou public schools. He is the fourth of five siblings, all JSU graduates. His family were farmers and grocery store owners in Mount Bayou. He earned an undergraduate degree in Accounting from Jackson State University, a Master of Science degree in Accounting from the University of Southern Mississippi, and a PhD in Public Policy Administration from Jackson State University. He was presented his CPA certificate by the Mississippi State Board on September 6, 1980.

Dr. Turner has a long and varied career, including working in government, industry, academe and public accounting. His career began as an Internal Revenue Officer and Agent Trainee in Jackson. He worked in private industry at the Lexton/Lextel Corporation, a telecommunication and automotive manufacturing company. His academic endeavors included a teaching position at Alcorn State University in Lorman and the administrative position of Vice-President of Business Affairs at Piney Woods Country Life School in Piney Woods. Notably, Dr. Turner has been affiliated with Jackson State University for over 35 years. At different times throughout his tenure, he served as Vice-President of Fiscal Affairs, Treasurer of the Development Foundation, Founding Director of the JSU Small Business Development Center and Assistant Professor of Accountancy. He began his career in public accounting working at Ernst and Whiney (now Ernst & Young) and is currently the CEO of Turner and Associates in Jackson, Mississippi. He is active in real estate and owns/operates

several small businesses.

On January 1, 1984, he was appointed by then Governor William Winter to the newly expanded seven-member State Board of Public Accountancy (State Board). Previously, the board consisted of only three members. Dr. Turner was one of four academics appointed to the board that year and became the first Black person to serve on that state government board. After the end of his term, then Governor Ray Mabus reappointed him to a second five-year term. Dr. Turner's tenure as a board member marked the beginning of more diverse and inclusive representation on the State Board. During the two terms he served, he held all the officer positions and chaired numerous standing and special committees.

His influence on the State Board is documented on page 130 of the *MSCPA Centennial History: A Century of CPAs in Mississippi*.

"Until the mid-1980s, the Mississippi certificate featured two illustrations. On the top right-hand corner was a drawing of a ship navigating the river for which the state is famous. The top left-hand corner was occupied by a drawing of several African Americans picking cotton. The latter illustration was removed only after Marvel A. Turner, Sr., the first African American to serve on the Mississippi State Board of Accountancy, joined the board in 1984." This illustration and commentary



are cited in *A White-Collar Profession, African American Certified Public Accountants Since 1921* by Theresa A. Hammond.

Dr. Turner has been a member of the MSCPA since 1981. His other professional affiliations include membership in the American Institute of Certified Public Accountants, Mississippi Association of Black Certified Public Accountants, National Association of Accountants, National Association of Public Administrators, and National Association of Black Accountants.

Acknowledging the importance of giving back to the community, Dr. Turner supports numerous nonprofit and community-based organizations. He is a past member and chair of the board of directors of the Metro Jackson Boys and Girls Club, immediate past president of the Central Mississippi Health Services board, and chair of trustee board of Lynch Street CME Church. He also served two terms on the Mississippi Prison Industry Board, where he held all officer positions. Dr. Turner was in the first class of Leadership Jackson and became its first alumni president. He was also a member of the audit team for the first statewide audit chaired by the Economic Development Task Force. Additionally, he is an active member of Alpha Phi Alpha Fraternity, Sigma Pi Phi Fraternity (Local, Regional and National Service), 100 Black Men of Jackson (2 terms as Treasurer), 100 Black Men of America, Pecan Park Neighborhood Association, and a life member of the Jackson State University Alumni Association.

Dr. Turner and his wife, Patrice, have two children, Marvel Jr. and Marva, and five grandchildren.

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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. **Our celebration is coming to a close and this feature is only planned for three more issues! If you or someone you know is a legacy of the profession, please email names and contact information to jtruhett@ms-cpa.org.***

Sharon A. Nadalich, CPA

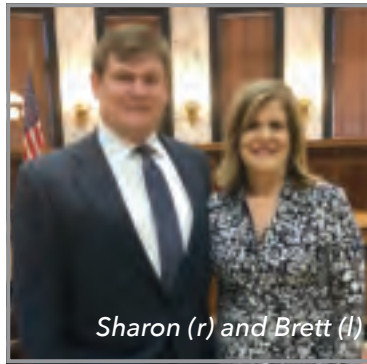
Sharon received a Bachelor of Science in Business Administration in Accounting from Mississippi College in 1989 and became a licensed CPA in Mississippi in 1992. She began her accounting career with Lefoldt & Co., P.A. in Ridgeland as a Senior Accountant, then joined MMI Hotel Group as Corporate Treasurer. In 2000, she became Controller for LeFleur Transportation where she worked for 17 years. She now works as a CPA for Pruet Companies in Jackson.

Sharon has loyally attended our MSCPA continuing education programs year after year. She is also involved in her community and has volunteered with Habitat for Humanity. She is a current member of Hope Hollow Ladies Auxiliary providing volunteer and fundraising support to Hope

Hollow Ministries in Canton.

Sharon and her husband, Chris, have two children, Brett and Olivia.

C. Brett Nadalich, CPA



Sharon (r) and Brett (l)

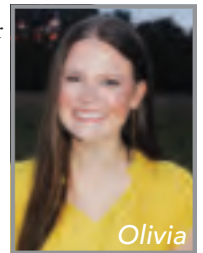
Brett is the son of Sharon Nadalich. Brett received a Bachelor and Masters of Accountancy from the University of Mississippi and became a licensed CPA in Mississippi in 2018. While working towards his bachelor degree, Brett was an accounting intern with DeVoe Carr, PLLC in Oxford and was an audit intern with BKD, LLP in Jackson. He began his accounting career with BKD as an Audit Associate in 2017 and was promoted to Senior Audit Associate in 2019. He now works as a Senior Financial Accountant for The Molpus Woodlands Group, LLC in Jackson. Brett attends our MSCPA continuing education programs including conferences,

chapter meetings, and seminars and has volunteered as part of our MSCPA Annual CPA Day of Service. He has also volunteered with the Ole Miss Big Event, the largest community service project in the history of the University of Mississippi. While at BKD, he participated in projects and events benefitting Habitat for Humanity and Canopy Children's Solutions.

Brett has been a member of Sigma Alpha Lambda and Beta Alpha Psi honor societies. He was awarded the BKD "Wow! Award" recognizing his contributions to the firm.

Olivia G. Nadalich

Olivia is the daughter of Sharon Nadalich. Olivia is currently pursuing a Bachelor of Accountancy as a sophomore in the Adkerson School of Accountancy at Mississippi State University with plans of becoming a CPA.



Olivia

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LEGISLATIVE UPDATE

continued from page 1

MDOR recognizes that to the extent these EIDL loans become a part of a PPP Loan and are subsequently forgiven, the forgiveness of these loans would not result in taxable income to the taxpayer. Further, MDOR has recognized that any business expenses paid with these proceeds would be deductible.

- **MS COVID 19 Business Relief Payments (\$2000 payments)** – MDOR has advised that these relief payments would be nontaxable income to the taxpayer and any expenses paid with these proceeds would be deductible provided that such expenses are deductible otherwise. The relief payments were to compensate for the initial compliance with the Governor's COVID Proclamation of March 14, 2020.
- **MS Rental Assistance Payments (payments to landlords for lost revenue)** – MDOR has advised that these grants are nontaxable income to the recipients but believes the expenses paid with these payments are not deductible for Mississippi purposes.
- **Department of Health & Human Services (HHS) COVID 19 grants** – MDOR has advised these grants are taxable income for MS income tax purposes and believes the expenses paid with these proceeds are deductible, consistent with the Federal treatment.
- **MS Back to Business (B2B) grants** – MDOR has advised these grants are nontaxable income to the recipients but current law provides that the expenses are not deductible at this time. HB1446 will allow the expenses to be deducted.

Deduction for B2B MS Grant Program eligible expenses (EIDL advances and MS rental assistance payments):

HB1446 passed the House 2/24. Received in the Senate 2/25. Referred to Senate Finance Committee 3/9. Voted out of Committee 3/11 back to the Senate floor.

The legislative deadline required original action on appropriations and finance bills on the floor opposite of

the originating chamber. If that did not happen, the bills were dead. HB1446 was voted out of the Senate with a date amendment and is in conference to work out the final product in a conference report as requested by MSCPA.

HB1446 would allow deduction for Back to Business (B2B) Mississippi Grant Program eligible expenses. MSCPA has requested amendments to the bill to allow the deduction of expenses on EIDL advances and MS rental assistance payments currently not deductible.

Members are encouraged to contact their Mississippi Legislators to express the need and urgency for these amendments that will result in taxpayers getting the full benefits of the COVID-19 relief, and so that returns can be filed. Consistency in tax treatments will, in turn, benefit tax preparers.

Early distributions from Qualified Accounts exempt from Federal 10% penalty due to the COVID exclusion:

MDOR has advised that early retirement account withdrawals are taxable for MS State income tax purposes, and further that there is no provision to allow the income to be spread over 3 years. If a taxpayer repays the distribution during the time period allowed, an adjustment can be made for the amount repaid on Schedule N of the Mississippi income tax return.

Federal unemployment exclusion:

The American Rescue Plan Act enacted on March 11, 2021, provided an exclusion from income of up to \$10,200 of unemployment compensation paid in 2020. MSCPA has inquired from the MDOR of whether they believe current MS law would follow this exclusion. The MDOR has advised it is their understanding the change promulgated by the American Rescue Plan Act would not affect the taxation of unemployment benefits for Mississippi income tax purposes. Therefore, according to MDOR, the full amount of unemployment benefits should be included in taxpayers' adjusted gross income for Mississippi purposes.

NOTE: This article includes guidance received as of press time.

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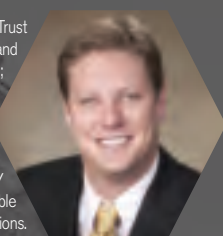
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IRS Statement - American Rescue Plan Act of 2021

The IRS is reviewing implementation plans for the newly enacted American Rescue Plan Act of 2021. Additional information about a new round of Economic Impact Payments, the expanded Child Tax Credit, including advance payments of the Child Tax Credit, and other tax provisions will be made available as soon as possible on IRS.gov. The IRS strongly urges taxpayers to not file amended returns related to the new legislative provisions or take other unnecessary steps at this time. The IRS will provide taxpayers with additional guidance on those provisions that could affect their 2020 tax return, including the retroactive provision that makes the first \$10,200 of 2020 unemployment benefits nontaxable. For those who haven't filed yet, the IRS will provide a worksheet for paper filers and work with software industry to update current tax software so that taxpayers can determine how to report their unemployment income on their 2020 tax return. For those who received unemployment benefits last year and have already filed their 2020 tax return, the IRS emphasizes they should not file an amended return at this time, until the IRS issues additional guidance.



Stennis

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Update on Mississippi Income Tax Repeal Bill

The Senate, on March 16, refused to consider House Bill 1439, the Mississippi Tax Freedom Act, which killed it thanks to a legislative deadline. Many senators said the House proposal was rushed and needs more vetting this summer. The House salvaged its 317-page proposal by inserting the language into a separate bill, the SB 2971 bond bill, which remains under consideration heading into the session's final weeks.

Some senators are advocating for a legislative study committee to meet this summer and agree on a revised tax cut plan that could be approved in 2022. Forming such a joint legislative committee that meets this summer would require passing a resolution this session.

MSCPA Discussion Board, Connect: connect.ms-cpa.org

MSCPA launched our Member Forum on Connect, our discussion board for all MSCPA members, in September. We have already seen members use Connect to communicate and share knowledge with fellow members.

Visit connect.ms-cpa.org to post a new discussion or question and comment on discussions either in the Connect platform or directly from the notification emails. You must log in to Connect using the same email and password that you use to access www.ms-cpa.org. If you don't know yours, you can use the password-less login option to receive a verification code by email instead.

Tax Day for Individuals Extended to May 17: Treasury, IRS, MDOR Extend Filing and Payment Deadline

The Treasury Department and Internal Revenue Service announced March 17 that the federal income tax filing due date for individuals for the 2020 tax year will be automatically extended from April 15, 2021, to May 17, 2021. The IRS will be providing formal guidance in the coming days.

This relief does not apply to estimated tax payments that are due on April 15, 2021. These payments are still due on April 15. Taxes must be paid as taxpayers earn or receive income during the year, either through withholding or estimated tax payments. In general, estimated tax payments are made quarterly to the IRS by people whose income isn't subject to income tax withholding, including self-employment income, interest, dividends, alimony or rental income. Most taxpayers automatically have their taxes withheld from

their paychecks and submitted to the IRS by their employer.

State tax returns

MDOR announced March 22 that Mississippi will follow the federal extension to file the 2020 individual income tax returns from April 15, 2021 to May 17, 2021. This extension only applies to the filing of the individual income tax return and payment of tax due. Penalty and interest will not accrue on the returns filed and payments made on or before May 17, 2021.

This extension does not apply to the quarterly estimated payments due on April 15, 2021. Visit www.dor.ms.gov

Winter storm disaster relief for Louisiana, Oklahoma and Texas

Earlier this year, following the disaster declarations issued by the Federal Emergency Management Agency (FEMA), the IRS announced relief for victims of the

February winter storms in Texas, Oklahoma and Louisiana. These states have until June 15, 2021, to file various individual and business tax returns and make tax payments. This extension to May 17 does not affect the June deadline.

At this time, President Biden has not declared MS counties as Federal disaster areas due to the winter storm nor has the IRS granted extensions to MS.

FEMA approved the State of Mississippi's request for a time extension to submit for a major disaster declaration due to the Winter Weather Event that occurred February 11-19, 2021. MEMA is working with county emergency management agencies and FEMA to complete these assessments by April 16, 2021.

For more information about this disaster relief, visit the disaster relief page on IRS.gov.

2021 Convention Set for June 23-27 at Sandestin

Join your fellow MSCPA members at Sandestin Golf and Beach Resort in Destin, Florida on June 23-27, 2021, for MSCPA's Annual Convention and Business Meeting. This year will mark the 36th consecutive year for Convention to be held at Sandestin.

Book Accommodations Early

Sandestin Golf and Beach Resort'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 24119C.

Per our contract with Sandestin, we earn complimentary rooms based on attendance if we meet our minimum percentage for the block. These rooms help defray the costs of housing the MSCPA staff and our speakers and entertainers. We can also be subject to a monetary attrition penalty if we do not utilize our group commitment. Even with rising meeting costs we continue to strive to hold a quality family oriented convention without passing the costs to our members. Please help the Society meet our goals!

Sandestin has room rates starting at \$185. Your cut-off date for reservations is **May 23**, after which rooms will be sold on a space-available basis. Visit our Convention webpage www.ms-cpa.org/education/annual-convention for more information.

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Group Code: 24119C

If a room type is unavailable online, please call Sandestin Group Reservation to check for availability. If you have any other trouble with availability, contact Karen Moody at the MSCPA office so



that she can contact our group housing representative.

Book Your Room Now for a Change to Win a FREE Sandestin Getaway!

Book your room directly with Sandestin using our group code by **May 1** to be automatically entered. Prize includes a free two-night stay in Luau at Sandestin. The winner will be selected in a random drawing during Convention.

Convention details are posted to the Society's website at www.ms-cpa.org/education/annual-convention. Convention brochures will also be mailed next month.

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CONVENTION AGENDA

continued from page 1

Additional Day of CPE - Now Offering 16 Hours

We have added an additional day of CPE Learning on Wednesday, June 23, bringing you four 4-hour course options.



Ingram



Barnes



Crawford

Wednesday, June 23, 8:30am - 12:00pm

Ethics, Rules, and Regulations, Donna Ingram

Wednesday, June 23, 1:00pm - 4:30pm

Unmasking Fraud, Donna Ingram

Thursday, June 24, 8:30am - 12:00pm

Post COVID Business Succession, Tax and Retirement Planning The First Six Months of POTUS, Trip Barnes

Thursday, June 24, 1:00pm - 4:30pm

Evaluating Internal Controls - What Could Go Wrong?, Wil Crawford

Complete details on the four courses are posted on the MSCPA website.

Convention registration begins Thursday, June 24, at 1 p.m. in the Azalea Foyer on the second level of the Baytowne Conference Center. The welcome reception starts at 7 p.m. in the Azalea Ballroom officially opening the meeting and members will be greeted by the current MSCPA officers. We will be celebrating our centennial with a "Night on the Red Carpet" theme. *Wear black and white!*

Friday Morning Speakers

Barry Melancon speaks at 9 a.m. on "Reimagining Accounting in Historic Times"

On the front lines of COVID-19's economic effects, accounting firms and finance teams are relied upon for their expertise, judgment and leadership. The profession is pivoting to deliver value during uncertainty, including providing services around business relief, digital transformation, remoting auditing and sustainability reporting and assurance. This presentation will provide insights into trends and issues impacting the profession as well as the support the AICPA provides members and students through resources, guidance, learning and advocacy.

Barry is the CEO of the Association of International Certified Professional Accountants, the most influential body of professional accountants in the world with 650,000 members and students. Formed

in 1917, it combines the strengths of The Chartered Institute of Management Accountants (CIMA) and the American Institute of CPAs (AICPA), which Melancon also leads as President & CEO. Melancon joined the AICPA in 1995 when he was 37 years old, and is now the longest serving CEO in the organization's 129 year history. Under his tenure, the AICPA has grown to become the largest membership body of CPAs in the world and has spearheaded a number of initiatives to benefit not only the profession, but also investors, business owners, lenders and the general public. Prior to joining the AICPA, Melancon served for eight years as Executive Director of the Society of Louisiana CPAs. He began his accounting career in 1979 at a small CPA firm in Louisiana and was elected a firm partner in 1984.

Charles Marshall speaks at 10:30 a.m. on "Real Heroes Don't Wear Spandex."

(A special invitation has been extended to spouses to hear Marshall's 10:30 a.m. presentation).

In real life, heroes aren't rock stars, movie stars, or sports figures. Real-life heroes are people who make a difference by believing in, and investing in, the lives of those around them without wearing a costume. In this thoroughly inspiring and fun-packed presentation, learn how to use the Powers of Success to overcome

obstacles and achieve success and how to engage the Power of Belief to revolutionize your organization.

Charles Marshall, a Clinton native, is one of the most popular humorous motivational speakers speaking today and has over 20 years' experience speaking to audiences all over the United States. Each year, Charles travels 100,000 miles to perform in over 100 corporate and civic venues from New York to California. His animated delivery and original observations have captivated over 1,000 audiences over the past two decades, including many Fortune 500 companies. He is the author of several books including: *The Seven Powers of Success* and *I'm Not Crazy But I Might Be A Carrier*. He also has produced and performed two full-length comedy videos, *Fully Animated* and *I'm Just Sayin'!*

Following the morning presentations, members are free to enjoy an afternoon of relaxation or may choose to participate in the golf tournament on the Baytowne Course or aboard the Destiny for an afternoon of fishing. A box lunch will be provided after the last speaker concludes.

Free Evening Friday Night

This year's convention schedule again features a free evening Friday night for members to enjoy the benefits of the Resort, and sponsors and exhibitors will have ample free time for networking.

New this year! Free 5K Fun Run

Convention attendees are invited to sign up and participate in a free 5K Fun Run at 6:00 a.m. on Saturday before the business meeting.

continued on page 12

CONVENTION AGENDA

continued from page 11

Annual Business Meeting Starts at 9 a.m. on Saturday

The Annual Business Meeting begins at 9 a.m. on Saturday with MSCPA Chairman Annette Pridgen presiding. Officers for the 2021-2022 fiscal year will be elected, and reports from the Secretary, Treasurer, President, Insurance Trust Chair, AICPA Council Representative, Mississippi State Board of Public Accountancy, Legislation Chair, State Auditor, and the Young CPA Network will be presented. Members who have won the Public Service Award and Outstanding Educator Award will also be honored. CPA exam medal winners will be recognized as will the recipient of the Rising Star Award.

Following the morning refreshment break, members will gather in the main meeting room at 11:20 a.m. for exhibitor prize drawings.

Saturday Afternoon

Volleyball Tournament and Beach Party 1:30 p.m. – 4:00 p.m. (between the Beachside Two and Luau condos). Tents will be set up and sponsors will have giveaways and door prizes.

Saturday Evening

Members return to the Conference Center on Saturday evening for the reception at 6:45 p.m. and will be seated for dinner at 7:30 p.m. We will honor and recognize members with a special Centennial program. MSCPA Chairman Annette Pridgen will introduce newly elected officers and the traditional exchange of the gavel will be made as MSCPA Chairman-Elect Ricky Bullock nears the beginning of his term. The Bailey Trophy will be presented to the winning volleyball team.

Entertainment will feature **Mr. Big & the Rhythm Sisters**, the hot new pick on the Gulf Coast. This band has an interactive approach and unique versatility winning success as the South's most premiere social events and conventions. Music selections from new chart busters to soulful jazz are all rolled together to meet the theme and customize each event to the delight of all ages. During the past ten years, Mr. Big has been selected to perform at most major venues and resort hotels on the coast. These seasoned musicians have performed with such greats as Lou Rawls, the Temptations, the Coasters, Dionne



Warwick, Benny Goodman, Frank Sinatra, the Platters, the Four Tops, Diana Ross, and Harry Connick Jr.

The evening will conclude with the prize money and Sandestin Getaway drawings. Members are urged to visit the exhibitors' booths on Friday and Saturday and have their convention cards stamped to be eligible for the prize.

Prayer Breakfast Closes Convention Sunday morning

The traditional Sunday morning Prayer Breakfast will close the 2021 meeting.

Special for Spouses

On Friday morning at 9 a.m., Hattiesburg chef, restaurateur, author, enthusiastic traveler, & world-class eater, Robert St. John, will share about his personal experience of "Eating Europe."



Robert St. John has spent almost four decades in the restaurant business. Thirty-two of those years have been as the owner of the Purple Parrot, Crescent City Grill, Mahogany Bar, Branch, Tabella, Ed's Burger Joint, The Midtowner, and Midtown Donut in Hattiesburg. For over 20 years he has written a weekly syndicated newspaper column. St. John has been named the state's top chef three

consecutive years and was honored as Mississippi Restaurateur of the Year. He is the author of eleven books, including four collaborations with watercolorist Wyatt Waters. Their book, *An Italian Palate*, was written in Europe while St. John, his wife, and his two children traveled through 72 cities, in 17 countries, on two continents for six months. His 11th book, *A Mississippi Palate*, another collaboration with Waters was released in 2018. St. John is also the creator, producer, and co-host of the Public Broadcasting series *Palate to Palette* with Robert St. John and Wyatt Waters which will soon film its fifth season. Breakfast is included. The program will conclude in time for spouses to hear Charles Marshall's presentation in the main meeting room.

And on Saturday starting at 9 a.m., bingo will be held in the Camellia Room with prizes made possible by the MSCPA Chapters.

Children Activities for Ages 4-12

- Thursday, June 24 (6:30 PM – 9:00 PM) Arts, crafts, games and snacks.
- Friday, June 25 (8:30 AM – Noon) Lawn and pool party with games and bottle rocket launcher activity.
- Saturday, June 26 (6:15 PM – 10:00 PM) Games, arts, crafts, carnival with Captain Davy Magic Show, balloon animals and face painting. Dinner included.

MSCPA 2021 Annual Convention Registration

June 23-27, 2021 | 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 \$195

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 23 8:30am – 12:00pm | CPE Credit: 4 \$160

Ethics, Rules, and Regulations, Donna Ingram

_____*Wednesday, June 23 1:00pm – 4:30pm | CPE Credit: 4 \$160

Unmasking Fraud, Donna Ingram

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

Post COVID Business Succession, Tax and Retirement Planning:

The First Six Months of POTUS, Trip Barnes

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

Evaluating Internal Controls – What Could Go Wrong?, Wil Crawford

SUBTOTAL

\$ _____

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

_____*Golf Tournament | Friday, June 25, 2021 \$80 per person

Includes green fee, cart fee, tournament registration and refreshments. Reservation must be received by May 31, 2021 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 25, 2021 \$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): _____

_____*5K Fun Run | Saturday, June 26, 2021, 6:00am FREE

Participant(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 and bottle rocket launcher activity.

_____*Number of children attending

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

_____*Number of children attending

SUBTOTAL

\$ _____

TOTAL AMOUNT DUE

\$ _____

TO REGISTER

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

Image of a credit card payment form with fields for card number, name, and address.

Cancellations thru June 21, 2021 accepted without penalty. Cancellations/no-shows on the date of the event forfeit the entire registration fee. No refunds or transfer of fees will be made after the date of the event.

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CPA Evolution Update

CPA Evolution is a joint initiative of the National Association of State Boards of Accountancy (NASBA) and the American Institute of Certified Public Accountants (AICPA). The initiative is transforming the CPA licensure model to reflect the rapidly changing skills and competencies the accounting profession requires today and will require in the future. It will put in place a flexible and adaptable licensure approach that will serve as the foundation for future-proofing the CPA profession.

Over three years, NASBA and the AICPA gathered input from more than 3,000 stakeholders from across the profession on how to transform CPA licensure and meet the needs of the marketplace. During these conversations, several key themes became clear:

- The profession supports the need to change the CPA licensure model
- Newly licensed CPAs should all demonstrate strong common core competencies
- The new CPA licensure model should position the CPA for the future
- The new CPA licensure model should continue to protect the public interest

Based on this feedback and lessons learned from studying other international and domestic licensure models, NASBA and the AICPA developed a new approach to CPA licensure. In 2020, both the AICPA Governing Council and the NASBA Board of Directors voted to support advancement of the CPA Evolution initiative. The AICPA and NASBA are now moving forward with implementing the new model.

What is the new licensure model?

The new CPA licensure model takes a core + discipline approach, starting with a deep and strong core in accounting, auditing, tax and technology that all candidates will be required to complete. Each candidate will also choose a discipline in which to demonstrate deeper skills and knowledge. Regardless of chosen discipline, this model leads to full CPA licensure, with rights and privileges consistent with any other CPA. A discipline selected for testing will not mean the CPA is limited to that practice area.

This model:

- Enhances public protection by producing candidates who have the deep knowledge necessary to perform high-quality work, meeting the needs of

organizations, firms and the public.

- Is responsive to feedback, as it builds accounting, auditing, tax and technology knowledge requirements into a robust common core.
- Reflects the realities of practice, requiring deeper proven knowledge in one of three disciplines that are pillars of the profession.
- Is adaptive and flexible, helping to future-proof the CPA as the profession continues to evolve.
- Results in one CPA license.

What does this mean for the Uniform CPA Examination?

The specific content of the core and the disciplines will be determined by a CPA Exam practice analysis, which is currently underway.

Practice analyses — gathering information about the current and future state of the profession and the work of newly licensed CPAs — are conducted periodically as part of the AICPA's ongoing efforts to make sure the Exam is current and to maintain its the validity and reliability. The current practice analysis will likely wrap up in 2022, and an Exam Blueprint will be exposed for public comment in mid-2022.

The AICPA and NASBA expect the new Exam will launch in January 2024.

What's next for students and CPA candidates?

Aspiring CPAs who are college freshmen now will be among the first to take the overhauled version of the CPA Exam when it launches in 2024. Current CPA candidates will be able to sit for the current CPA Exam until the launch of the new Exam, and a transition plan is being developed for candidates who have

started but not completed the CPA Exam process as of January 2024. Under the new model, the AICPA and NASBA expect to attract students that today wouldn't necessarily choose the CPA route, but who are becoming more critical to the success of the CPA profession.

How are the AICPA and NASBA supporting accounting academic programs and educators?

Accounting educators will play a vital role in preparing students to pursue the CPA under this new licensure model. The AICPA and NASBA are committed to helping educators every step of the way.

The AICPA and NASBA have engaged with faculty and practitioner volunteers to build a model curriculum that aligns with the core + discipline licensure model. The model curriculum will launch this June, and updates will be posted on [EvolutionofCPA.org](https://www.evolutionofcpa.org).

Faculty can also access the Academic Resource Hub, a free database of content from the AICPA, accounting firms, academics and AICPA teaching-award winners that will help faculty prepare students for the rapidly evolving demands of the profession. The hub contains over 200 resources for a range of class levels on topics like data analytics and cybersecurity to use in classroom instruction.

Throughout 2021, the AICPA will be holding a series of faculty webinars including regular updates on CPA Evolution and deep dives into emerging topics to include in accounting courses.

As CPA Evolution continues to progress, please check back for updates at [EvolutionofCPA.org](https://www.evolutionofcpa.org). If you have any questions, please reach out to Feedback@EvolutionofCPA.org.





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Protecting your team's mental health

By Carl Peterson, CPA, CGMA

What impact has the pandemic had on the mental wellbeing of your firm members? That's an important question to ask. Seventy-eight percent of adults believe the coronavirus pandemic is a significant source of stress in their lives, according to a Harris Poll conducted for the American Psychological Association. This is a good time to take a step back and consider the stressors that may be affecting your team and how to mitigate them.

Recognize the challenges. During this long-lasting pandemic—and given its impact on our families, our communities, our clients and our own firms - it seems likely there are many people who have not experienced significant mental health concerns before but who could be suffering from them now. That may be because of issues such as the change in how and where they do their work, the disruption to normal routines and activities, isolation from many family members and friends, the mingling of work and family life, and new demands related to school age children or other personal responsibilities. Another factor is the fear of the unknown. We probably all entered the pandemic expecting it to be over within a reasonable amount of time, but after many months it remains unclear when it will end so that we can all return to normal. That all adds up to make this an unprecedented and challenging time when it comes to maintaining mental health. The first step for practitioners is to be aware that employees may be experiencing a wide array of emotions including denial, anger, anxiety, fatigue and burnout.

Lead with kindness. In this time, firm leaders need to embrace a culture of safety and vulnerability that promotes

open and honest conversations about personal feelings and challenges. Firm members need to be confident that they can share the emotional or personal issues they are facing without worrying about its impact on their careers. Building the right culture includes talking openly and discussing possible solutions, while recognizing the problems that we can't control. I recommend cultivating patience and flexibility, so that firms can accept the challenges and find ways to address them together.

Offer information on help. Firms can make a great contribution to employee wellbeing by gathering information about mental health resources in their own community or online and sharing them with their team. If your firm offers access to an employee assistance program, make sure that team members know about it and understand that it can be a valuable resource. If this isn't a resource you offer, talk to your team and gauge interest as this may be an additional benefit you want to provide in 2021. Offering staff access to tools they may need demonstrates your understanding and support.

Stop focusing on time. One quick way to take the pressure off staff is to stop using timesheets or worrying about calculating production, realization or utilization. This is a smart practice management idea because it shifts the emphasis from hours worked to value produced and goals accomplished, which are the things that really matter. During a pandemic, it can also relieve staff from accumulating and tracking hours. In addition, offering mental health or wellbeing days during lockdowns can allow staff to totally disengage without having to worry about

work along with other concerns.

Be a good role model. There are two important ways that firm leaders' behavior can enhance their employees' mental health:

- Allow your people the flexibility that you enjoy. Make sure your people have the same chances to unwind, manage their schedules or take a break from routines that you have.
- Don't overdo it. Firm owners often feel compelled to go into overdrive, especially during challenging times. That's not great for you or a good example for your people. Give yourself a break so that others understand that it's acceptable for them to do so, also.

With that in mind, remember that it's important not to forget about your own mental health. That includes stepping back regularly to assess your wellbeing. Whether it's a matter of giving yourself time for exercise or a favorite activity or getting professional help to work through the stresses you face, these steps will be beneficial to you and your firm and will show your staff that you are making mental health a priority.

Compassion starts at the top

In a small firm, the success and culture of the firm start at the top. Practitioners who consider the wellbeing of their entire team—including themselves—and nurture a culture of kindness can inspire and maintain a mentally healthy firm.

Carl Peterson, CPA, CGMA is the Association's Vice President of Small Firm Interests. Have questions for Carl? Contact him directly at carl.peterson@aicpa-cima.com or 651-252-4618.

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Virtual Annual Young CPA Conference

Wednesday, April 28, 2021

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This conference is geared toward young professionals and young CPAs

TOPICS:

- What will the accounting profession look like in 5 years?
- DiSC profile: Improving teamwork, communication, and productivity in the workplace
- Cybersecurity: Keeping your data and that of your clients safe
- And More!

FEATURED SPEAKERS:

Brent McClure, CPA

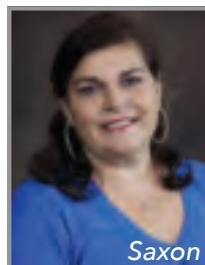
Brent McClure owns L. Brent McClure, CPA where he focuses primarily on CFO Services and Advisory. Prior to focusing on this full time, he spent 5 years as a CFO for privately held companies. Before transitioning to a CFO role, Brent spent 14 years in public accounting and consulting roles. His client service experience included emerging growth, middle market, and large multinational companies, both public and privately held. Brent worked with a variety of industries primarily in the service, manufacturing and distribution industry space, but also in construction, technology and other industries. Brent is a licensed CPA in Alabama and Mississippi and is a CGMA. He obtained a MBA from Tulane University and gained a lot of skills and knowledge from growing up in the family grocery store.



McClure

Gay Saxon

Gay Saxon has been a member of the professional staff at Hinds Community College for 20 years. She is the Director of Training and Professional Development at Hinds. Gay has 30+ years of experience in adult training and has worked with a wide variety of businesses, industries and schools. Gay has created and facilitated numerous training programs that focus on leadership, team building and management development. Gay is a graduate of MGCCC, Delta State University and Jackson State University and has received her Doctorate in Education from Delta State. Gay has been recognized as one of Mississippi's 50 Leading Business Women by the Mississippi Business Journal and has received the Life Star Award at Hinds Community College.



Saxon

Jay White

Jay is Chief Information Security Officer for the Mississippi Department of Information Technology Services. As CISO, he is the director of the Information Security Division whose mission is to provide resources, guidance, and oversight needed for improving the cybersecurity posture of the enterprise network for state government operations. Jay's division is responsible for developing and maintaining the State of Mississippi Enterprise Security Policy that establishes the minimum security requirements for state agencies, and they manage core and perimeter defense systems for the enterprise state network. They also collaborate with each state agency on strategies for improving the enterprise-wide approach to information security.































































White

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

Volunteer or Nominate a Member for MSCPA Young CPA Network Board

The MSCPA Young CPA Network is seeking volunteers and nominations for 2021-2022. Young CPA Network members will elect new members to the Young CPA Network Board of Directors at the Annual Young CPA Conference on April 28, 2021. You are invited to volunteer or send names of suggested candidates to Jack Kaler, Young CPA Network President, at msyoungcpa@ms-cpa.org by April 16, 2021.

2021 CPE AT A GLANCE

BEGIN	DAY	NEW	COURSE TITLE	CITY	LOCATION	LIVESTREAM	AICPA	MEM	NON MEM	CPE HRS	RECOM'D CATEGORY
Jan 8	Fr	New	Legislation and PPP Loan Program (Year End Update)	N/A	Online			79	99	2	Tax
Jan 14	Th	New	PPP Round 2 (All of the Latest Details)	N/A	Online			79	99	2	Tax
Jan 20	W	New	PPP Round 1 (Loan Forgiveness)	N/A	Online			79	99	2	Tax
Jan 21	Th	New	What You Need to Know About the COVID-19 Legislative	N/A	Online			79	99	2	Tax
Jan 26	T		Ethics, Rules, and Regulations	Ridgeland	MSCPA Center			160	200	4	Ethics
Feb 2	T	New	What's New: 2021 COVID Relief Updates	N/A	Online			39	59	1	Gen
Apr 28	W		Young CPA Conference	N/A	Online			125	125	8	Gen
May 10	M		Ethics, Rules, and Regulations	Ridgeland	MSCPA Center			160	200	4	Ethics
May 10	M		MS Sales and Use Tax	Ridgeland	MSCPA Center			160	200	4	Tax
May 11-12	T-W		Business & Industry: Management Dev Conf	Ridgeland	MSCPA Center			325	445	16	Gen
May 13	Th		Accounting and Auditing Conference	Ridgeland	MSCPA Center			225	300	8	A&A
May 17-18	M-T		MS Technology Conference	N/A	Online			485	605	16	Gen
May 19	W	New	The Big Picture: A Fresh Review of the Keys	Ridgeland	MSCPA Center			280	350	8	Gen
May 20	Th	New	CFO Series- Become More Effective	Ridgeland	MSCPA Center			290	360	8	Gen
May 21	F		The Strategic CFO	Ridgeland	MSCPA Center			290	360	8	Gen
May 24	M	New	Income Tax Planning	Ridgeland	MSCPA Center		30	280	350	8	Tax
May 25	T		Advanced Taxation LLCs & Partnerships	Ridgeland	MSCPA Center		30	280	350	8	Tax
May 26	W	New	What Fraud Schemes Exist in Your Organization	Ridgeland	MSCPA Center		30	280	350	8	A&A
May 27	Th	New	The New Auditors' Reporting Standards	Ridgeland	MSCPA Center		30	280	350	8	A&A
May 28	F	New	Audits of Employee Benefit Plans Subject to ERISA	Ridgeland	MSCPA Center		30	280	350	8	A&A
Jun 1	T	New	Winning the Fraud Battle in the 21st Century:	Ridgeland	MSCPA Center			280	350	8	A&A
Jun 2	W	New	Conducting a Remote Audit	Ridgeland	MSCPA Center			160	200	4	A&A
Jun 2	W	New	Annual FASB Update and Review	Ridgeland	MSCPA Center			160	200	4	A&A
Jun 3	Th	New	Guided Tour of the Form 990+Schedules	Ridgeland	MSCPA Center			280	350	8	Tax
Jun 4	F	New	The Essential Guide to Nonprofit Accounting	Ridgeland	MSCPA Center			280	350	8	A&A
Jun 7	M	New	Limited Liability Companies: Losses, Liquidations,	Ridgeland	MSCPA Center			160	200	4	Tax
Jun 7	M		Succession Planning for the Small Business Owner	Ridgeland	MSCPA Center			160	200	4	Tax
Jun 8	T	New	Yellow Book: Application of GAGAS Principles	Ridgeland	MSCPA Center			160	200	4	A&A/YB
Jun 8	T	New	Understanding and Testing Control and Compliance in a Single Audit	Ridgeland	MSCPA Center			160	200	4	A&A/YB
Jun 9	W		Tax Planning for Small Businesses	Ridgeland	MSCPA Center			160	200	4	Tax
Jun 9	W		Taxation of Property Transactions	Ridgeland	MSCPA Center			160	200	4	Tax
Jun 10	Th		Select Estate and Life Planning Issues for the Middle-Income Client	Ridgeland	MSCPA Center			160	200	4	Tax
Jun 10	Th		Securing a Comfortable Retirement	Ridgeland	MSCPA Center			160	200	4	Gen/2 Tax/2
Jun 11	F		Employer's Handbook: Health Care, Retirement	Ridgeland	MSCPA Center			160	200	4	Gen/2 Tax/2
Jun 11	F		Change the Way You Work: Success as a Virtual CFO	Ridgeland	MSCPA Center			160	200	4	Gen
Jun 14	M		How Fraud Can Affect Smaller Organizations	Ridgeland	MSCPA Center			160	200	4	A&A
Jun 14	M	New	Internal Control Planning for the Post Pandemic World	Ridgeland	MSCPA Center			160	200	4	A&A
Jun 15	T		Using Internal Control to Strengthen Security, Efficiency	Ridgeland	MSCPA Center			280	350	8	A&A
Jun 16	W		Advanced Excel® Topics for Spreadsheet Power Users	Ridgeland	MSCPA Center			280	350	8	Gen
Jun 17	Th	New	Staff Retention	Ridgeland	MSCPA Center			170	210	4	Gen
Jun 17	Th		Balance Sheet Management: The Least Understood Risk?	Ridgeland	MSCPA Center			170	210	4	Gen
Jun 18	F		Cash Management: Managing the Lifeblood of the Business	Ridgeland	MSCPA Center			280	350	8	A&A/6 Gen/2
Jun 21	M		Interpreting the New Revenue Recognition Standard	Ridgeland	MSCPA Center			160	200	4	A&A
Jun 21	M		The Bottom Line on the New Lease Accounting Requirements	Ridgeland	MSCPA Center			160	200	4	A&A
Jun 22	T	New	Current Issues in Accounting and Auditing: An Annual Update	Ridgeland	MSCPA Center			160	200	4	A&A
Jun 22	T	New	Update on Recent AICPA Standard Setting	Ridgeland	MSCPA Center			160	200	4	A&A
Jun 23	W	New	Advanced Controller and CFO Skills	Ridgeland	MSCPA Center		30	280	350	8	Gen
Jun 24	Th		Construction Contractors: Accounting and Auditing	Ridgeland	MSCPA Center		30	280	350	8	A&A
Jun 25	F		Applying the Uniform Guidance in Your Single Audits	Ridgeland	MSCPA Center		30	280	350	8	A&A/YB
Jun 28	M		Advanced Tax Planning for S Corps	Ridgeland	MSCPA Center		30	280	350	8	Tax
Jun 29	T	New	Tax Fundamentals of LLCs and Partnerships	Ridgeland	MSCPA Center		30	280	350	8	Tax
Jun 30	W		Ethics, Rules, and Regulations	Ridgeland	MSCPA Center			160	200	4	Ethics
Jun 30	W		Fraud in Plain Sight	Ridgeland	MSCPA Center			160	200	4	A&A
Jul 12	M		K2's Advanced QuickBooks Tips and Techniques	N/A	Online			170	210	4	A&A
Jul 12	M	New	K2's Improving Productivity with Office 365 Cloud Applications	N/A	Online			170	210	4	Gen
Jul 13	T		K2's Business Intelligence, Featuring Microsoft's Power BI Tools	N/A	Online			290	360	8	A&A
Jul 14	W		K2's Excel Tips, Tricks, and Techniques for Accountants	N/A	Online			290	360	8	A&A
Aug 9	M		K2's Excel PivotTables for Accountants	N/A	Online			290	360	8	A&A
Aug 10	T		K2's QuickBooks for Accountants	N/A	Online			290	360	8	A&A
Aug 11	W		K2's Testing and Auditing Excel Workbooks	N/A	Online			170	210	4	Gen

2021 CPE AT A GLANCE

BEGIN	DAY	NEW	COURSE TITLE	CITY	LOCATION	LIVESTREAM	AICPA	MEM	NON MEM	CPE HRS	RECOM'D CATEGORY
Aug 11	W		K2's Top PDF Features You Should Know	N/A	Online			170	210	4	Gen
Aug 19-20	Th-F		Governmental Accounting and Auditing Conference	N/A	Online			295	395	16	A&A/YB
Aug 24	T		Banking and Finance Conference	Ridgeland	MSCPA Center			200	275	8	Gen
Aug 26	Th		Agriculture and Farm Activities Conference	Ridgeland	MSCPA Center			215	215	8	Tax
Sep 24	F		Health Care Services Conference	Ridgeland	MSCPA Center			215	215	8	Gen
Oct 18	M		Annual Update for Accountants and Auditors	Ridgeland	MSCPA Center		30	280	350	8	A&A
Oct 19	T		Annual Update and Practice Issues for Preparation, Compilation	Ridgeland	MSCPA Center		30	280	350	8	A&A
Oct 22	F		Industry Conference	Ridgeland	MSCPA Center			180	255	8	Gen
Oct 26	T	New	Choice of Entity	Ridgeland	MSCPA Center			160	200	4	Tax
Oct 26	T	New	Estate & Trust	Ridgeland	MSCPA Center			160	200	4	Tax
Oct 27	W		Annual Update for Controllers	Ridgeland	MSCPA Center		30	280	350	8	A&A
Oct 29	F		Accounting Education Conference	Ridgeland	MSCPA Center			100	100	8	Gen
Nov 1	M		S Corporations: Key Issues, Compliance, and Tax Strategies	Ridgeland	MSCPA Center		30	280	350	8	Tax
Nov 2-3	T-W		1040 Tax Return Workshop	Ridgeland	MSCPA Center		60	395	545	16	Tax
Nov 4	Th		Advanced Topics in a Single Audit	Hattiesburg	Trent Lott Center		30	280	350	8	A&A/YB
Nov 4	Th		AICPA's Federal Tax Update	Hattiesburg	Trent Lott Center		30	280	350	8	Tax
Nov 5	F		Ethics, Rules, and Regulations	Hattiesburg	Trent Lott Center			160	200	4	Ethics
Nov 5	F		Fraud in Plain Sight	Hattiesburg	Trent Lott Center			160	200	4	A&A
Nov 5	F		This Year's Best Income Tax, Estate Tax, and Financial-Planning	Hattiesburg	Trent Lott Center			280	350	8	Tax
Nov 10	W		Evaluating Fraud Risk in a Financial Statement Audit	Tupelo	BancorpSouth Conf			160	200	4	A&A
Nov 10	W		Avoiding Deficiencies in Peer Reviews: Focus on Engagement Quality	Tupelo	BancorpSouth Conf			160	200	4	A&A
Nov 10	W		Ethics, Rules, and Regulations	Tupelo	BancorpSouth Conf			160	200	4	Ethics
Nov 10	W		Fraud in Plain Sight	Tupelo	BancorpSouth Conf			160	200	4	A&A
Nov 11	Th		Financial Statement Disclosures: A Guide for Small	Tupelo	BancorpSouth Conf			160	200	4	A&A
Nov 11	Th		AICPA's Federal Tax Update	Tupelo	BancorpSouth Conf		30	280	350	8	Tax
Nov 11	Th		Top 10 Technology Risks and Trends Every CPA Should Know	Tupelo	BancorpSouth Conf			160	200	4	A&A
Nov 12	F		The Top Five Tax Issues in Dealing with LLCs and Partnerships	Oxford	Graduate Oxford			160	200	4	Tax
Nov 12	F		Surgent's Essential Depreciation and Expensing Update	Oxford	Graduate Oxford			160	200	4	Tax
Nov 16	T		Not-for-Profit Conference	Ridgeland	Embassy Suites			125	125	8	Gen
Nov 18	Th		Business Valuation and Litigation Services Conference	Ridgeland	MSCPA Center			185	260	8	Gen
Dec 1-2	W-Th		Mississippi Tax Institute	Jackson	Hilton Jackson			300	300	12	Tax
Dec 13	M		Ethics, Rules, and Regulations	Biloxi	Golden Nugget			160	200	4	Ethics
Dec 13	M		Social Security and Medicare: Maximizing Retirement Benefits	Biloxi	Golden Nugget			160	200	4	Tax
Dec 14	T		AICPA's Federal Tax Update	Biloxi	Golden Nugget		30	280	350	8	Tax
Dec 15	W		Ethics, Rules, and Regulations	Ridgeland	MSCPA Center			160	200	4	Ethics
Dec 16	Th		AICPA's Federal Tax Update	Ridgeland	MSCPA Center		30	280	350	8	Tax

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UPCOMING CPE



LIVESTREAM

AICPA

AICPA MEMBER DISCOUNT

ACRONYM:.....YCPACW
 VENDOR:.....MSCPA
 Level:.....Intermediate
 CPE Credit:.....8 General
 Location:.....Online
 M / N:.....\$125 / \$125
 Time:.....8:30am-4:30pm



4/28/2021
Wed

Young CPA Conference
Speaker: Various

This MSCPA Young CPA Network event is for young and aspiring CPAs looking to build success skills to get ahead. Visit the website at www.ms-cpa.org for a complete agenda.

ACRONYM:.....ERR-2 / ERRW-2
 VENDOR:.....MSCPA
 Level:.....Update
 CPE Credit:.....3 Ethics/1 MS Rules
 City:.....Ridgeland
 Location:.....MSCPA Training Center / Online
 M / N:.....\$160 / \$200
 Time:.....1:00pm-4:30pm



5/10/2021
Mon

Ethics, Rules, and Regulations
Speaker: Donna Ingram

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

ACRONYM:.....MSUT / MSUTW
 VENDOR:.....MSCPA
 Level:.....Update
 CPE Credit:.....4 Tax
 City:.....Ridgeland
 Location:.....MSCPA Training Center / Online
 M / N:.....\$160 / \$200
 Time:.....8:30am-12:00pm



5/10/2021
Mon

MS Sales and Use Tax
Speaker: Greg Duke

This seminar, led by a representative of the Mississippi Department of Revenue, will include an Introduction on Sales Tax: Levies, Returns and Filing, and Exemptions; Use Tax; Casual Sales Tax; Industry-Specific Sales Tax; Contractor's Tax; and more. This seminar will be a great opportunity to get the latest Sales and Use Tax information directly from the Department of Revenue.

ACRONYM:.....PMD / PMDW
 VENDOR:.....MSCPA
 Level:.....Intermediate
 CPE Credit:.....16 General
 City:.....Ridgeland
 Location:.....MSCPA Training Center / Online
 M / N:.....\$325 / \$445
 Time:.....8:30am-4:30pm



5/11-12/2021
Tues-Wed

Business & Industry Management Development Conference
Speaker: Various

The Program for Management Development is geared toward chief financial officers, controllers and other executives in industry, managers, and partners in public accounting. Visit the website at www.ms-cpa.org for a complete agenda.

ACRONYM:.....AAC / AACW
 VENDOR:.....MSCPA
 Level:.....Update
 CPE Credit:.....8 A&A
 City:.....Ridgeland
 Location:.....MSCPA Training Center / Online
 M / N:.....\$225 / \$300
 Time:.....8:30am-4:30pm



5/13/2021
Thurs

Accounting and Auditing Conference
Speaker: Various

This event will provide the crucial guidance you need to stay in compliance with the many A&A rules affecting your practice, business or clients. Visit the website at www.ms-cpa.org for a complete agenda.

ACRONYM:.....MTCW
 VENDOR:.....K2
 Level:.....Intermediate
 CPE Credit:.....16 General
 Location:.....Online
 M / N:.....\$485 / \$605
 Time:.....8:30am-4:30pm



5/17-18/2021
Mon-Tues

MS Technology Conference
Speaker: Various

This two-day event attracts public, industry, and technology focused individuals seeking best practices in technology. Be impressed by the best tools, software, and resources to help you succeed. This year K2 Enterprises brings a variety of new sessions. Technology has forever changed the business world. Do you have the knowledge you need to move forward? Are you as effective as you can be within your organization or for your clients? Can you remain competitive? Visit the website at www.ms-cpa.org for a complete agenda.

ACRONYM:.....TBP / TBPW
 VENDOR:.....MSCPA
 Level:.....Intermediate
 CPE Credit:.....8 General
 City:.....Ridgeland
 Location:.....MSCPA Training Center / Online
 M / N:.....\$280 / \$350
 Time:.....8:30am-4:30pm



5/19/2021
Wed

The Big Picture: A fresh review of the keys to what's happening in the world, your organization, and you
Speaker: Bob Mims

This seminar is devoted to the Big Picture. Most accountants get bogged down in the debits, the credits and the minutia of the day to day issues of our organization. Having a fresh perspective on the world, your organization and you can maximize your perspective and career. The following items will be discussed: Review of mega trends, big data and why they matter, Discussion of strategic planning down to the numbers, The why of ethics and understanding you and them, and Communicating numbers in a world or words. This session will specifically address these issues from the perspective of both the for profit and not for profit organizations.

LIVESTREAM

AICPA MEMBER DISCOUNT

ACRONYM:..... CFOS5 / CFOS5W
 VENDOR: The Knowledge Institute
 Level: Intermediate
 CPE Credit: 8 General
 City: Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$290 / \$360
 Time: 8:30am-4:30pm



**5/20/2021
Thurs**

**CFO Series- Become More Effective
Speaker: Bob Mims**

This series is for people who are, or aspire to be, chief financial officers. We target the discussions to people in medium-sized organizations. Experience preparing or reviewing accounting processes and reports. Experience working with internal clients or external clients and business leaders. Bring a laptop.

ACRONYM:..... SCFO / SCFOW
 VENDOR: The Knowledge Institute
 Level: Intermediate
 CPE Credit: 8 General
 City: Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$290 / \$360
 Time: 8:30am-4:30pm



**5/21/2021
Fri**

**The Strategic CFO
Speaker: Bob Mims**

Your financial accounting credentials do not automatically qualify you for a CFO role. Today's CFOs have skills that go far beyond financial accounting. Come share ideas with veteran CFOs and learn new techniques that will make you more effective now and long into the future.

ACRONYM:..... TSEITP / TSEITPW
 VENDOR: AICPA
 Level: Advanced
 CPE Credit: 8 Tax
 City: Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$280 / \$350
 Time: 8:30am-4:30pm



AICPA

**5/24/2021
Mon**

**Income Tax Planning
Speaker: William F. (Bill) Taylor**

Since Congress's passage of the Tax Cuts and Jobs Act, many clients and businesses are highly focused on the impact of taxes and tax rates on their bottom line. Make sure your clients are protecting themselves from higher taxes. Completely updated for tax law changes and Tax Court decisions, this course will bring you up-to-date on the latest strategies which will preserve your clients' wealth and ensure your role as a trusted adviser to your clients! Get the latest techniques for building and conserving wealth through proactive tax-planning and investment strategies.

ACRONYM:..... TSEAPL / TSEAPLW
 VENDOR: AICPA
 Level: Advanced
 CPE Credit: 8 Tax
 City: Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$280 / \$350
 Time: 8:30am-4:30pm



AICPA

**5/25/2021
Tues**

**Advanced Taxation LLCs & Partnerships
Speaker: William F. (Bill) Taylor**

Partnership tax law is arguably one of the most complex set of provisions in the Internal Revenue Code. To effectively serve your business and individual partner clients, you must have a good working knowledge of the Internal Revenue Code's sophisticated partnership tax rules and regulations. This course can help you to master the advanced concepts of partnership taxation, so you can provide your clients with valuable advice and tax planning strategies. Updated with the most recent legislation and IRS guidance affecting Partnerships & LLCs, this course will guide you through the complicated world of advanced partnership and LLC tax law. Some of the many concepts covered in this course include special allocations, liquidating and non-liquidation distributions, property basis calculations under various scenarios, and sales of a partnership interest.

ACRONYM:..... FSEO / FSEOW
 VENDOR: AICPA
 Level: Basic
 CPE Credit: 8 A&A
 City: Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$280 / \$350
 Time: 8:30am-4:30pm



AICPA

**5/26/2021
Wed**

**What Fraud Schemes Exist in Your Organization
Speaker: Jeffrey Lieman**

Many costly fraud schemes have occurred repeatedly throughout the past several decades, mostly due to the lack of implementation of internal controls and a fraud risk mitigation plan. The advancement of technology and the increased sophistication in committing fraud are also impacting organizations and affecting their bottom line. The Business Fraud Risk Framework identifies various types of fraud that can be perpetrated across an organization. This course will provide insight into the framework and focus on the most prevalent fraud schemes affecting organizations.

ACRONYM:..... AURPT / AURPTW
 VENDOR: AICPA
 Level: Intermediate
 CPE Credit: 8 A&A
 City: Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$280 / \$350
 Time: 8:30am-4:30pm



AICPA

**5/27/2021
Thurs**

**The New Auditors' Reporting Standards
Speaker: Jeffrey Lieman**

The Auditing Standards Board of the AICPA has recently completed a project to update its standards surrounding auditor reporting. With more than half a dozen new Statements on Auditing Standards, effecting the entire 700 series of the professional standards, there is a lot to learn about the new requirements. This course will take you through the significant areas of Professional Standards, including highlighting the new areas and requirements. The audit report, while retaining much of the familiar language, is much different under these new standards. Let us walk you through to ensure compliance.

ACRONYM:..... AUEBP / AUEBPW
 VENDOR: AICPA
 Level: Basic
 CPE Credit: 8 A&A
 City: Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$280 / \$350
 Time: 8:30am-4:30pm



AICPA

**5/28/2021
Fri**

**Audits of Employee Benefit Plans Subject to ERISA
Speaker: Cecil M. (Bill) Felder**

Employee benefit plan (EBP) audit engagements continue to be scrutinized by regulators and peer reviewers due to history of noncompliance with applicable professional standards. Auditors require proper skills to perform EBP engagements effectively. You will work through the plan audit process from client acceptance/continuance through engagement archive. As the most common type of plans audited, you will take a deep dive into defined contribution plans to comply with professional standards, ERISA and SEC requirements. You will also obtain an awareness of additional considerations when auditing defined benefit pension plans and health and welfare benefit plans. Tap into ways to plan and conduct effective risk-based plan audits to comply with professional standards while maximizing efficiency.



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