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MSCPA

MISSISSIPPI SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS

VOLUME XLVIII

MAY 2013

Mail Ballots Available for Officer Election

Members who choose to cast an absentee ballot for the 2013-2014 officer slate and the at-large Board of Governors member may now request a ballot from the Society office.

Requests should be made in writing to the MSCPAs, 306 Southampton Row, Ridgeland, MS 39157 or by email to mail@ms-cpa.org. The Bylaws require that an absentee ballot must be voted and returned to the Society office no later than five days prior to the date of the Annual Business Meeting (June 22).

See pages 4-5 for photos and profiles on the candidates.

Exam Medal Winners Announced

The MSCPAs Awards, Education & Scholarships Committee has notified winners of Gold, Silver and Bronze medals from the 2012 CPA Exam.

These awards honor those who attained the highest scores in passing all parts of the exam in one sitting during 2012. Winners will be recognized during the Business Meeting of the MSCPAs 2013 Annual Meeting on Saturday, June 22 at the Sandestin Golf & Beach Resort.

Medal winners from 2012 include:

- The Fred T. Neely Gold Medal: Laura Heather Gillenwater, Brandon
- The T. E. Lott Silver Medal: Jennifer A. Corbitt, Olive Branch
- The Silas M. Simmons Bronze Medal: Daniel Safley Reynolds, Water Valley

State Board Honors **New CPAs** During April 27 Ceremony



The Mississippi State Board of Public Accountancy honored new CPAs during their Spring ceremony April 27 at the New Capitol. State Society President Lee Adams provided an introduction to the MSCPAs and Wil Crawford, President of the Young CPA Network, invited the new CPAs to become active in Young CPA Network Activities. Keynote speaker was Alfonzo Alexander, President of the NASBA Center for Public Trust. Willie B. Sims, Chairman of the State Board, administered the Oath of Title. The new CPAs included William Fortson Baird, Jr., Peyton Cole Cavin, Christopher John Cousin, Keith Tyrus Eleuterius, Laura Shows Evans, Danielle Serina Grant, Emily Sabol McHan, William Jabe Mills, Elizabeth Ann Rayborn, Sara Jean Schumacher, Kimberlie D. Smith, Laura Amye Williams Smith, Jonathon E. Stevenson, Tara Beth Stigall, and Marila Lane Wall.



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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

New members include: John Mitchell Davis, Selena Nicole Davis, Nicholas Ethan Reiber, and Kimberlie D. Smith.

Now completing the membership process are:

Moses Caswell Ard was born in McComb and received his Bachelor of Accountancy and Master of Taxation degrees from Mississippi State University. He is a CPA on staff of Silas Simmons, LLP in Natchez.

Luther Andrew Dews as born in Hattiesburg and is applying as an Associate Member. He attended Millsaps College and received his Bachelor's in Business Administration from Mississippi College. He is Divisional Auditor with Salvation Army DHQ in Jackson.

Lauren Posey Different was born in Vicksburg and received Bachelor of Accountancy and Master of Professional Accountancy degrees from Mississippi State University. She is on the Professional Staff of May & Company in Vicksburg.

Hilary Ann Eisbrenner was born in Mt. Clemens, Michigan and received a Bachelor of Finance at Michigan State University and a Master of Finance at Walsh College. She is SVP/CFO of the Keesler Federal Credit Union in Biloxi.

Laura Elizabeth Evans was born in Magee and received an AA from East

Central Community College and BSBA and MBA degrees from the University of Southern Mississippi. She is a Fixed Asset Accountant with CSpire Wireless in Ridgeland.

Tommy E. Hurtt was born in Philadelphia, Miss., and received his Bachelor's degree from Mississippi State University. He is a Staff CPA with Culpepper and Culpepper CPAs in Meridian.

Thomas Wesley Jenkins was born in New Orleans and is applying as an Associate Member. He received his BS in Business Administration from Mississippi College and is Chief Auditor with The Salvation Army in Jackson.

David A. Maatallah was born in Las Vegas and is applying as an Associate Member. He received his BS/BA in Accounting from the University of Nevada, Las Vegas and is completing an MBA at Delta State University. He is a Contract Employee/CFO with the Mississippi Division of Medicaid in Jackson.

William Jabe Mills was born in Mobile and received BSBA and Master of Professional Accountancy degrees from the University of Southern Mississippi. He is a Staff Accountant with Piltz, Williams, LaRosa & Co. in Biloxi.

Elizabeth Ann Rayborn was born in Corona, California and received Bachelor of Business Administration and Master of Professional Accountancy degrees from Delta State University. She is an Accountant/CPA with Alexander, Van Loon, Sloan, Levens & Favre in Wiggins.

Sara Jean Schumacher was born in Maple Grove, Minnesota and received Bachelor of Business Administration in Accounting and Master of Accountancy degrees from Millsaps College. She is a Staff Accountant with Carr, Riggs & Ingram LLC in Ridgeland.

Mitchell Aaron Taylor was born in Meridian and earned a Bachelor of Science in Psychology and Bachelor of Accountancy degrees from Mississippi State University. He is a Staff Auditor with Rea, Shaw, Giffin and Stuart, LLP in Meridian.

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MEET THE CANDIDATES

Vice President / President-Elect



Darrell L. Galey is a director with Piltz, Williams, LaRosa & Co. in Biloxi. He joined the firm in 1973 after graduating from Delta State University and has over 39 years experience in public accounting in the areas of taxation and auditing. He has served in various offices with the MSCPA's Gulf Coast Chapter. Darrell has served on the MSCPA's Board of Governors and as a member and chairman of the MSCPA Governmental Accounting and Auditing Committee. He has also served as a member and chairman of the

Mississippi State Board of Accountancy's Board Oversight Committee. Darrell is a member of the Jackson County Chamber of Commerce and serves on its Small Business Issues Group. He is a member of the Biloxi Lions Club and an active member of First Baptist Church of Biloxi where he has served on various committees, including chairman of the Finance Committee, deacon; teacher, and has been a member of the adult choir. Darrell and his wife Sandra are the parents of three children and have one granddaughter.



Karen C. Moody, Jackson, is the Director of Accounting for Lampton-Love, Inc. and Subsidiaries having served in that position for 24 years. She is responsible for all areas of financial reporting and also oversees internal audit and acquisitions and manages the administrative office. She previously spent 8 years in public practice with Haddox, Reid, Burkes & Calhoun PLLC where she was senior audit manager specializing in oil and gas and hotel clients and also worked in tax and employee profit sharing plans. She graduated from the University of Southern Mississippi in 1981 with a Bachelor of Science in Accounting and received the MSCPA Outstanding Accounting Graduate Award. Karen has been active in the MSCPA having served as Secretary, Vice-President and President of the Central Chapter and as Secretary of the MSCPA. She is the longest standing member of the Awards, Education & Scholarship Committee where she has been the Secretary and is beginning her 7th year as Chairman. She has also served on the Industry Committee and completed 3 terms on the Board of Governors. She is a member of the AICPA and was chosen as a CPA Ambassador for Mississippi. Karen resides in Clinton where she served two terms as President of the Clinton Civitan Club and was the Secretary/Treasurer of the Clinton Optimist Club. She and her husband, Tommy, are the parents of two adult sons, Austin and Josh, and are members of the Utica Christian Church.

Treasurer



Melanie Morrow is a native of Jackson, Mississippi, and graduated from Mississippi College with a Bachelor of Business Administration. She also received her Master of Business Administration with Accounting Concentration from Mississippi College. Melanie has also earned Certified Controls Specialist (CCS) and Certified Fraud Examiner (CFE) designations. As a valued member of GranthamPoole's healthcare, fraud, marketing, and tax teams, Melanie's experience will allow her to assist clients in medical

practice analysis, internal control and fraud reviews, and productivity studies. Melanie is a member of the National Association of Certified Fraud Examiners and the American Institute of Certified Public Accountants. She is also president of the Central Mississippi Chapter of Certified Fraud Examiners, and was elected into the 2010 AICPA Leadership Academy. Melanie also serves as a past president for the MS Young CPAs and has served on the MSCPA's Board of Governors as the Young CPA representative. During her spare time, Melanie enjoys participating in various volunteer activities as a member of the First Ladies Civitan of Metro Jackson. She resides in Flowood and is a member of Pinelake Church in Brandon.



Charles Robert Prince has a Certified Public Accounting practice in Magee, MS which he opened in 1984. Prior to establishing his practice, Charles was employed with the Mississippi State Department of Audit. Charles has over 30 years experience in public accounting. He manages audits, tax and tax planning, payroll, bookkeeping, and advisory services for clients. He also serves as a financial advisor to several Mississippi counties, school boards, hospitals and nursing homes. Charles is a native of Magee, MS. He graduated from Magee High School, Jones county

Junior College and the University of Southern Mississippi. Charles serves on the Board of Directors at Priorityone Bank. He is a member and former director of the Magee Chamber of Commerce, The Simpson County Development Foundation and is a member and deacon of First Baptist Church, Magee, MS. He and his wife, Judy, have two children and one grandchild. Charles' professional affiliations include The American Institute of Certified Public Accountants and The Mississippi Society of CPA's. He currently serves as Chairman of The Mississippi Society of CPA's Peer Review Committee. He has also served on the Mississippi Society of CPA's Governmental Accounting and Auditing Committee and the Professional Conduct Committee.

Secretary



Nathan J. Cummins is a partner with May & Company, LLP in Vicksburg. His experience includes tax, audit, accounting and consulting in a range of industries. He specializes in governmental and non-profit audits and construction industries. Along with the Certified Public Accountant designation, Nathan is also a Certified Information Technology Professional. He is a graduate of Mississippi State University with a Bachelor's degree in professional accountancy and a Master's degree in taxation. Nathan currently serves on the Board of the Central Chapter of Mississippi Society of Certified Public Accountants as Vice President of Programs, as auditor



Anna Langley, Oxford, is the Director of Finance & Accounting for the University of Mississippi Foundation. In this position, she has direct oversight responsibility for the Foundation's investment portfolio and reporting and disseminating financial information to departments throughout the University. Prior to joining the Foundation in 2011, Anna was an Audit and Assurance Manager with BKD, LLP. She has over eleven years of auditing and public accounting experience. Anna's primary focus while in public accounting was Manufacturing & Distribution and Financial Services. She also served as QuickBooks Pro-Advisor for small businesses throughout Mississippi. Prior to locating to

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NATHAN CUMMINS continued from page 4

of the Donor Investments Panel of the United Way of West Central Mississippi, treasurer of the Clinton Chamber of Commerce and as treasurer of the Vicksburg Art Association. Nathan is also the accounting & auditing chairman for the MSCPA for the 2013-2014 year. He formerly served on the Board of the Central Chapter of MSCPA as Vice President of Membership. He is a member of the American Institute of Certified Public Accountants and the Mississippi State University Alumni Association. Nathan lives in Clinton and attends Parkway Baptist Church. He was selected as one of Mississippi's Top 40 Under 40 by the Mississippi Business Journal in 2012.

ANNA LANGLEY continued from page 4

Mississippi, Anna was employed at the Federal Reserve Bank of Kansas City in the Management Development Program where she gained experience in the Financial Services, Retail Pricing and Human Resource areas. She graduated from Oklahoma State University with a Bachelor of Agricultural Sciences and Accounting. Anna currently serves as the Treasurer of the Northwest Chapter of MSCPA and a member of the MSCPA's Long Range Planning Committee. She is actively involved in the Oxford-Lafayette Community by serving as a Board Member for More Than a Meal and is the Chairman of the Finance Council of St. John's Catholic Church. Additionally, she served as the Treasurer for the local United Way for six years. She and her husband, Jimmy, have two daughters Avery and Addison.

At-Large Board Member



Bob Cunningham is a partner with Grantham, Poole, Randall, Reitano, Arrington & Cunningham, PLLC. His responsibilities include auditing, corporate and individual tax planning and compliance, business valuations and litigation support. He is active in the MSCPA having previously served as President during 2009 – 2010. He has also served the MSCPA as vice president and secretary and represented the Central Chapter on the MSCPA Board of Governors. He was previously chairman of the Management of an Accounting Practice Committee, currently serves on the PEER Review Committee and is a former member of the several other MSCPA committees. Mr. Cunningham is a 1978 graduate of the University of Mississippi and previously served on its Accountancy Alumni Board. He is also a Past President of the Jackson Chapter of the Institute of Management Accountants and of the Jackson Club. Bob and his wife Anne have three children. They are members of First Presbyterian Church in Jackson where he currently serves as an elder and previously served as Chairman and Treasurer of the Diaconate and as a Sunday school teacher.



Ed Jones, Pascagoula, is managing member of Jones & Hemenway. After graduating from Southern Miss in 1973, he began his career with Williams, Nader & Matthews in Jackson and Hattiesburg and was a shareholder in Seymour, Toups & Jones in Pascagoula. Ed, a member of the AICPA, has served the MSCPA as President, Treasurer, Secretary, & a member of the Board of Governors. He is starting his 5th year as Chairman of the Long Range Planning Committee & has served as Chairman of the Management of an Accounting Practice & as a member of the Legislation, Taxation, & Professional Conduct Committees. Ed also served on the

Task Force, which recommended the acquisition/construction of the current MSCPA facilities. Ed has served the Gulf Coast Chapter as President & CPE Chairman. He has served as Chairman of the Mississippi Tax Institute. He has coordinated the MSCPA Convention Prayer Breakfast for approximately 15 of the last 20 years. Active in his community, Ed was chosen the Jackson County Chamber of Commerce Small Business Leader of the Year & served as President & Board member of the Kiwanis Club. He was named an outstanding volunteer with the Jackson County Youth Court, served as Chairman of the Pascagoula Civil Service Commission, & served as Allocations Chairman of the United Way of Jackson County. Ed is serving his 14th year as a trustee of the Mississippi Baptist Foundation. He & his wife, Mary, have 2 children & 2 grandchildren, & they are active in First Baptist Church of Pascagoula, where Ed has served as Chairman of Deacons & has served for over 20 years as Deacon, Bible Teacher, & Chairman/Member/Advisor to the Finance Committee.

Mississippi Society of Certified Public Accountants

INCORPORATED UNDER THE LAWS OF THE STATE OF MISSISSIPPI

NOTICE OF ANNUAL MEETING

To: Members, Mississippi Society of Certified Public Accountants

In accordance with the Bylaws, the members are hereby notified of the annual meeting of the Mississippi Society of Certified Public Accountants to be held at the Sandestin Resort, Destin, Florida, on Thursday, Friday, Saturday and Sunday, June 20-23, 2013.

The Annual Business Meeting will convene on Saturday, June 22, 2013 at 9:00 a.m. The election of officers, reports from officers, and other business will be conducted at this time. Candidates for office with biographical data are included in this Newsletter.

A special program has been designed to interest all members, their spouses, children and guests.

Lee Adams
President

What is **Your Practice Worth** in the **2013 M&A Market?**

By Gary Adamson, CPA

Tax Season 2013 is over and the M&A frenzy will pick back up again where it left off. So, what is your practice worth? What can you expect whether you are a buyer or seller? One thing is for sure – Baby Boomers are selling at a rate that the profession has never seen before. It is still a sellers market, for now. But the demographics and the thousands of practices that will soon be for sale suggest that may change over the next few years.

We are often asked by our clients about the market and what firms are selling for. Everyone wants to know “what’s the multiple?” Let’s start with a little bit of background and definition. First of all, there are basically two types of deals in the CPA firm M&A world. One is a “merger” transaction where generally, partners of the smaller firm join the larger firm with the key characteristic being that those partners plan to continue with the larger firm on more than a short term basis. Normally no cash changes hands. Rather the incoming partners are brought into the firm’s existing deferred compensation /partner buyout plan.

The second is really a purchase where the partners or sole proprietor of the smaller firm are selling the practice and are not continuing on a long term basis with the larger firm. These tend to be the smaller deals. Often, a single transaction will combine a merger approach for some incoming partners and the buyout of others.

This article is focused on the purchase transaction. At the smallest end of the spectrum are the cash deals. In spite of lots of talk, we just don’t see them. In fact, they are almost non-existent in the firms that we work with. The generally accepted deal structure for most purchases in the profession today is a multiple of revenue approach paid out over a period of time, with no interest.

The first question we get from our clients is usually “what multiple of revenue are practices selling for?” We normally answer that question with another question: As the buyer would you take this deal: a \$500,000 tax practice, good rate per hour, located in your back yard, zero or a small down payment, good transition of clients by the retiring sole practitioner, and the price is 15% of collections over ten years. There usually is a short pause and the answer is “yes, absolutely.” So far I don’t think we

have heard a no.

In the preceding example, as the buyer you just said yes to paying a multiple of 1.5 times revenue for the practice! What?? Why would you do that? The point is it’s not just about the multiple; it’s about the overall deal structure and terms. The multiple is only one piece of the puzzle.

Although we won’t touch on everything, the important components that go together to make up and influence the structure are:

- Size of practice
- Profitability of the practice
- Location
- Down payment
- Term (number of years) of the payments
- Length of time before the purchase price is fixed
- Extent and quality of client transition
- And finally, the multiple of revenue being paid

The relative size of a practice being acquired will have an impact on the pricing of a deal. Generally, the larger the target, the fewer potential buyers there will be and the price is lower. Likewise the pricing is impacted by the location of the target. If you are in a major metro area there are more potential suitors and you can command a higher price.

Be careful on analyzing the profitability of the practice. Most of us want to focus on the financials of the target and yes, we do want to review and understand them. But as the buyer, the more important questions should be the margins and profitability in our firm. What is it going to look like in our shop? Cost structures are different and how we staff it may be different.

The down payment, length of payment term and when the price is fixed or locked down all work together to influence the multiple. As you can probably imagine, as the down payment goes up the buyer has more risk and the multiple may go down. A down payment of more than 20% is fairly unusual in this post recession market and we often see any down payment treated as an advance on the first year or two of payments. The length of the payment term is normally in the range of four to six years and the multiple will be higher as the term increases.

The lock down of the price deserves some explanation. In our \$500,000 tax

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PRACTICE WORTH

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practice example there is no lockdown and the seller would have received 15% of collections or \$75,000 for ten years, assuming that the revenue stayed at the \$500,000 level. Of course, it won't stay at that same amount. Hopefully the acquiring firm is going to grow it but most sellers are worried that it will shrink. To protect against that shrinkage, sellers want a lock down or fixing of the price after some period of time. We normally see that in the one to three year range. So, if in our example we included a two year lock down, the value would be fixed at the end of two years based on the revenue of the practice at that time. The remaining payments would be adjusted accordingly.

The length and quality of the transition to be provided by the exiting partners or sole practitioner is critical to the retention of clients and the value of the practice. The interplay of the transition and the lock down of the pricing is key.

So, what about the multiple? We see a lot of transactions in the 1 to 1.25 range, with the higher end of the scale in the metro areas. That would assume terms in

the "somewhat normal range" such as a down payment of not more than 20%, a five year payout, a two year lock down, good transition, etc.

A few more details to be aware of include:

- Furniture and equipment are normally included (the buyer receives them).
- Work in process and accounts receivable are normally not included.
- As the buyer, always share the upside prior to the lock down with the seller.
- Make sure that your transition plan includes two cycles.

For a little bit more information, in a recent article available on our website, we shared what sole practitioners are thinking regarding multiples and terms in the sale of their practices. Our source was the 2012 Succession Survey conducted by the Succession Institute in cooperation with PCPS.

Gary Adamson is the President of Adamson Advisory, specializing in practice management consulting for CPA firms. He is an Indiana University graduate and has extensive hands on experience as the recent managing partner of a top 200 CPA firm. He can be reached at (765) 488.0691 or gadamson@adamsonadvisory.com. For more about Adamson Advisory, visit www.adamsonadvisory.com or follow the company at www.adamsonadvisory.com/blog

CGMA at Work: Employers Voices

By Barry Payne, Director for Business Development, AICPA

Since we launched the Chartered Global Management Accountant designation early last year, our goal has been to elevate management accounting. To me, that means raising the profile and value of management accountants in the eyes of their current, and future, employers. By recognizing and highlighting the strategic contributions that CPAs working in business and industry make every day, we can make their value known--and understood--in the marketplace.

That's why we are reaching out to some of the leading global employers of finance professionals and talking to them about the CGMA designation. Over the past three years, I've been working with a number of Fortune 100 companies in both my former role as Director, Global Corporate Relations for the Chartered Institute of Management Accountants (CIMA), and more recently as Director for Business Development for the AICPA. I've spent much of this time

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CGMA AT WORK

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learning what leaders of finance teams and departments around the world need to drive success. Now I speak with those same leaders and their US counterparts about the CGMA designation, how it can help them develop their finance teams, and how CGMA designation holders are well positioned to be strategic advisors to organizational leadership.

And our message seems to resonate. Employers understand the key role that management accountants play, or should play, in guiding critical decisions and driving business performance. They also have shared some insights into their needs that can help us better serve CPA, CGMAs. I have found the interaction rewarding and thought provoking.

Take, for example, the case of American Express (AMEX). AMEX has a significant finance organization, including many CPAs. Additionally, AMEX employs several CIMA-qualified CGMAs. In March, we were invited to participate in two AMEX career development expos, one in Phoenix, one in New York. Specifically for AMEX's employees in finance roles, the events were

designed to provide attendees with useful information to encourage them to pursue learning and development opportunities. We set up a booth stacked with CGMA reports and information packets, and over the course of the two days, spoke with hundreds of employees and hiring managers at various stages of their careers. I'd like to share some of their feedback:

- CGMA Innovation Agenda materials resonated, especially the Fast Track to Leadership report which appeals to finance professionals as they develop their careers.
- While several CPA, CGMAs stopped by, those CPAs who hadn't heard of CGMA were interested in learning more. They appreciated the fact that the CGMA designation recognizes their expertise and were encouraged that we were engaging their employer.
- Younger employees at the start of their careers were interested in CGMA, and understood that they'd need to get their CPA first. One employee pointed out that the CGMA presented a new incentive to pursue the CPA over other degrees and credentials, especially as he pursues his career in management accounting.

- Senior-level finance professionals who were not CPAs visited our booth as well, and asked us how the CGMA designation might apply to them or their teams. We explained how the CGMA designation signals expertise and provides resources to keep designation holders at the top of their profession. As hiring managers, they saw the benefit of the designation in helping them identify capable candidates. As mentors and leaders, they saw the CGMA designation as a potential career enhancement for their existing staff.

We continue to work with organizations like American Express and as our relationships deepen, we expect more opportunities to connect with finance professionals and leaders. But we're just getting started. The CGMA designation is new to the market and we're in the early stages of adoption among companies and organizations both here in the US and abroad. Organizations like American Express, with CPA, CGMAs and FCMA, CGMAs in key strategic roles, are leading the way. Our task is to help them along their journey and drive broader acceptance of the designation.

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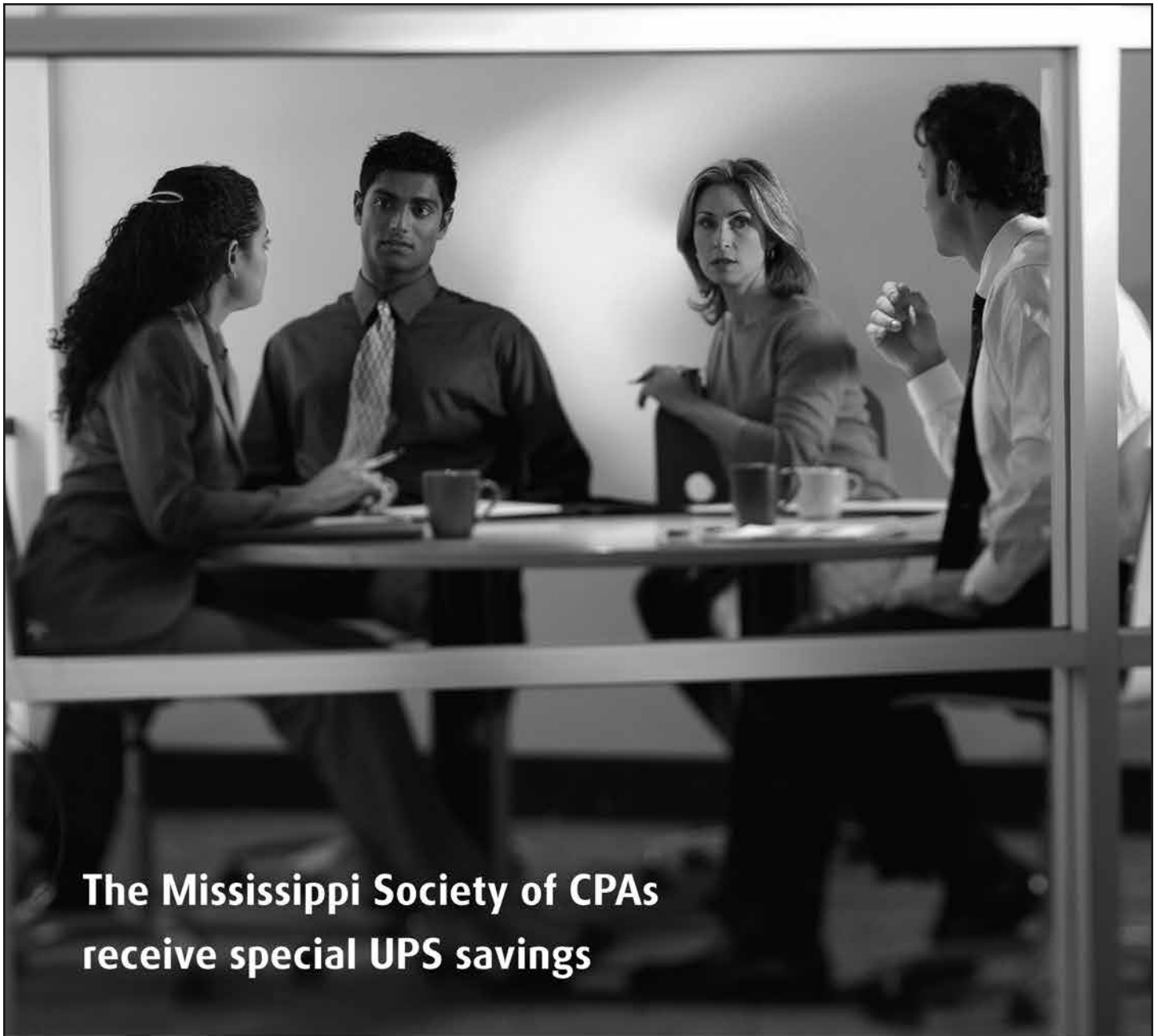
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A New Perspective

by Randy Johnston, Exec VP, K2 Enterprises

Continuing Professional Education (CPE) can be a wonderful thing or a painful one. Taking the time to improve yourself and your knowledge can be very exciting and beneficial. New insights, improved strategies, easier ways to accomplish mundane tasks, as well evolutionary and revolutionary ways of completing the work to run a business can be very rewarding.

Think about your top three business issues to resolve today. Picture the possible solutions. Have these issues persisted for more than three years? Were the issues aggravated by the recent economic conditions? What is your path forward to resolve these items? Does part of the solution involve technology? Would more knowledge be useful in identifying solutions and resolving the issues? Part of the benefit of State Society membership is networking with your peers who have similar responsibilities. Another part of the benefit of belonging to your state CPA Society is asking for help to find answers. Perhaps your State Society CPE coordinator could help you locate educational content to help. This knowledge can be delivered in-house, via the web, or through live delivery, including all-day courses or multi-day conferences.

What Is Working?

Both CPAs in Industry as well as the CPA in Public Practice tell us that the following technologies are making a difference in solving business issues:

1) Workflow – the ability to move work through a series of pre-defined steps is one of the highest ROI technologies today. Workflow systems organize and control procedures, and can inform management of the status of work in progress. Workflows can support assignment of work to team members, work load balancing and scheduling as well as different processes for tax, audit, bookkeeping, sales, HR, payroll, billing and other key functions. What type of workflow are you using?

2) Smartphones and Tablets – with over 50% of the U.S. market carrying a Smartphone and over 25% of all U.S. adults owning a tablet, wouldn't it be wise to think about how to improve productivity and increase ROI in these investments?

3) Portals – since transferring information securely is a concern to many businesses, the ability to publish or transfer one or more documents through your web site can be a strategic tool. Making documents available in a portal should

require minimal effort and be a natural part of the document creation or consumption process. How easy is it to use your portal?

4) Cloud Storage, Hosting and SaaS applications – the ability to have documents and data stored in the Cloud or accessible remotely, is a competitive advantage. Cloud Document Management, hosting or SaaS applications can be a significant shift in strategy. Have you considered your public Cloud, private Cloud, or hybrid strategy?

5) Access from any device, anytime, anywhere – the ability to get to any work from any device by the right people at the right place and the right time is a competitive advantage. Mobile technologies continue to improve and enable productive work from more places. Can you work as effectively at home or at a client site as you can in the office?

6) Collaborative Accounting – is the ability for multiple people to work in your accounting system at the same time. If you are in public practice, this would include providing client access. Most organizations are replacing their accounting system with their fourth generation of accounting. How appropriate is your system for your needs? When did you replace it last?

7) New Generation Microsoft Technologies – Microsoft has changed almost everything in the past year. Windows 8, Office 2013, Office 365, Windows Server 2012, Exchange 2013, SQL 2013 and more, are enabling new reporting technologies such as PowerPivot and Power View. These features are helping users build better dashboards and collaborate more accurately while quickly completing work. When did you get your last update on Microsoft Excel or Office? If you haven't had, at least, a refresher course on Microsoft technologies in the past year, you certainly have a lot of potential personal gain.

8) Integration into and between systems – the ability to have your systems effectively talk to each other, including low end accounting software like QuickBooks or other key operational systems, is strategic. A pretty good rule here is “if an accountant is keying data, there is a broken process.” Are your systems as connected as you would like them to be?

9) Collaboration – is the ability to have documents or data in a shared or common structure where one or more users can simultaneously update the information. Note that this can be in the Cloud or in a private Cloud your organization has created.

Working in teams or being able to delegate and review easily are important hallmarks of effective use of collaboration. How easy is it for you to collaborate with other team members?

10) Apps – Solving business problems seems to moving from broad systems that do it all, to point systems that address a few issues plus have the benefit of integration. Yes, big ERP systems still exist and yes they are still challenging to implement, but the other end of the market has exploded. What do you know about apps that can solve some of your business issues?

This list is not intended be comprehensive, but merely reflective of key technologies that can make a difference in achieving specific business strategies and tactics. Can you with great confidence know that you have command and control of this simple list of ten technologies? What about the technology opportunities that you don't know about?

But That's Not All! Get Help from Your State Society!

Part of the reason our K2 organization has enjoyed a long term relationship with your State Society is the ability to help you, the member, with increased productivity and technology savvy. Whether you are faced with strategic or tactical decisions that involve Cloud technologies, Bring Your Own Device (BYOD), mobile and tablet technologies, accounting software, document management, workflow or an overhaul of your core operational systems, our K2 team prepares courses with your needs in mind.

Your State Society not only produces a two-day technology conference where all of the technologies above are discussed including practical demonstrations, but also implementation strategies and risks are covered, along with quality CPE as well. A key difference between CPE and what a vendor tells you is that facts and practical application need to be a part of your CPE experience. Beyond the technology conference, your Society has specialty conferences, all-day courses, webinars and in-house education that can help you and your team members. Isn't it wise to invest in your business and yourself?

Mr. Johnston is a shareholder in K2 Enterprises, where he develops and presents continuing professional education programs to accounting, financial, and other business professionals across North America. You may contact him at randy@k2e.com.



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MISSISSIPPI SOCIETY OF CPAS 2013 ANNUAL MEETING Wednesday, June 19 - Sunday, June 23, 2013	GROUP CODE: 22P8YG
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Name _____ Number in Party: Adults ____ Children ____
 Company Name _____ Business Phone _____
 Address _____ E-Mail _____
 City _____ State _____ Zip _____
 Sharing With _____
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Your cut-off date for reservations is **May 5, 2013**, after which rooms will be sold on a space-available basis.

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<u>Accommodation</u>	<u>Rate</u>	<u>Accommodation</u>	<u>Rate</u>
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Westwinds 1 Bdrm*	\$ 380.00	LeCiel - 1 Bdrm Suite	\$ 203.00
Westwinds 2 Bdrm*	\$ 510.00	Village – Studio	\$ 185.00
Westwinds 3 Bdrm*	\$ 659.00	Village 1Bdrm	\$ 207.00
Luau 1 Bdrm	\$ 210.00	Village 2 Bdrm	\$ 332.00
Luau 2 Bdrm	\$ 286.00	Village 3 Bdrm	\$ 417.00
Southside 2 Bdrm	\$ 300.00	Grand Complex Studio	\$ 197.00
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		Grand Complex 3 Bdrm	\$ 410.00

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2013 MSCPA Convention: June 20-23, 2013

The 2013 MSCPA Annual Convention is June 20-23, 2013 at the Sandestin Golf & Beach Resort in Sandestin, Florida. President Lee Adams extends an invitation to all MSCPA members and friends of the Society to attend.

Activities begin on Thursday, June 20 as exhibitors set up in the Baytowne Conference Center. Two four-hour CPE programs are offered with Dr. Quinton Booker of Jackson State University presenting a four-hour Ethics, Rules & Regulations Seminar Thursday morning and Bill Taylor, CPA, presenting a four-hour course on "Beyond the Fiscal Cliff: Tax Implications of the 2013 Budget Deal" Thursday afternoon. A separate brochure with complete details is available on the two four-hour programs.

The convention registration desk opens at 1 p.m. Thursday 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.

Bill Balhoff, AICPA Vice Chairman, presents a Professional Issues Update at 9 a.m. on Friday...

William E. "Bill" Balhoff, CPA, CFE, CFF, CGMA, is the Managing Director and CEO for Postlethwaite & Netterville. He joined P&N in 1976 and became a director in 1986. He currently serves as Vice Chairman on the American Institute of Certified Public Accountants' (AICPA) Board of Directors. With over 35 years experience, he has brought experience in technical audit, accounting, and consulting activities. Bill is a Past Chair of the AICPA's PCPS Executive Committee and a past member of the Financial Accounting Standards Advisory Council (FASAC). Additionally, he has been named among the "Top 100 Most Influential People" in the accounting industry by Accounting Today and CPA Magazine. Bill has been a national speaker on numerous topics including professional standards updates and managing practices.

Dr. Will Fleenor, K2 Enterprises, presents a Technology Update starting at 10:15 a.m....

Will is currently a Shareholder of K2E, LLC. Will has conducted seminars for 48 State CPA Societies, and has spoken at numerous accounting technology conferences, including speaking at the AICPA Information Technology Conference for 22 years, as well as doing training for other organizations such as the FBI. Will is a past Chairman of the AICPA Information Technology Conference, as well as past chairman of other conferences and professional committees. Will is a co-author

of the Practitioners Publishing Company's "Guide to Installing Microcomputer Accounting Systems" and has had numerous articles published in professional journals including the Journal of Accountancy, the CPA Journal, and others.

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 Sweet Jody for an afternoon of fishing. A box lunch will be provided after the last speaker concludes.

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

The Annual Business Meeting begins at 9 a.m. on Saturday with President Lee Adams presiding. Officers for the 2013-2014 fiscal year will be elected and reports from the Secretary, Treasurer, Insurance Trust Chairman, Legislation, and the Mississippi State Board of Public Accountancy will be presented. Members who have won the Outstanding Educator and Public Service Awards will also be honored. CPA Exam Medal Winners will be recognized.

Tim Moore of Generational Insights speaks at 11 a.m. on Saturday:

Timothy Moore is an accomplished author and speaker with over three decades of experience in marketing, sales, and training. At Generational Insights, Moore is part of a team that has become the leading voice on the impact of generational differences on sales, marketing, and management. He combines the research of Generational Insights with his own professional experience to provide generational strategies and solutions. Tim holds a Bachelor of Arts degree from Elon University in North Carolina, where he served as student body president. He is a board member of the Elon Alumni Association and a member of Who's Who in American Colleges and Universities. He is one of about 80 million Baby Boomers who are still busy changing the world.

Free Time Saturday Afternoon

Members return from a free afternoon for the concluding reception with heavy hors d'oeuvres and cocktails in the Conference Center. President Adams will introduce newly elected officers and the traditional exchange of gavel will be made as President-Elect Beth Burgess nears the beginning of her term.

Prayer Breakfast Closes Convention Sunday morning...

The traditional Sunday morning Prayer Breakfast, very popular with members and well attended, will close the 2013 meeting.

Special for Spouses: On Friday morning at 9 o'clock, Vicki McCain of Destin returns by popular demand to present a

cooking demonstration. Breakfast is included. Vicki presents cooking classes in the area and operated the Kitchenique Store for many years. This will be held on the Second Level of the Baytowne Conference Center. And on Saturday starting at 9 a.m., bingo will be held in the conference center with prizes made possible by the MSCPA Chapters.



2014 Multi-State CPE & Ski Conference

January 13, 14, & 15, 2014

24 Hours of CPE

Beaver Run Resort & Conference Center

Sponsorship: Sponsored by the Colorado Society of CPAs and the following eighteen state CPA Societies: Arkansas Society of CPAs, Connecticut Society of CPAs, Florida Institute of CPAs, Hawaii Society of CPAs, Idaho Society of CPAs, Iowa Society of CPAs, Kansas Society of CPAs, Society of Louisiana CPAs, Massachusetts Society of CPAs, Mississippi Society of CPAs, Montana Society of CPAs, Ohio Society of CPAs, South Carolina Association of CPAs, South Dakota Society of CPAs, Texas Society of CPAs, Utah Association of CPAs, Washington Society of CPAs, Wisconsin Institute of CPAs.

The 2014 Multi-state CPE & Ski Conference (supported by nineteen state CPA societies) is pleased to bring you the very best CPE & Ski Conference. The Conference features 6 four-hour sessions on a wide variety of today's most popular CPE topics. The instructors rank among the top in the United States. It is truly refreshing to obtain your required CPE and enjoy physical exercise, fresh air, and scenic views. As one CPA put it, "this conference is a great prelude to busy season. It refreshes you and makes it much easier to tackle the busy months ahead." To receive an information packet containing detailed course descriptions and instructor biographies, please call K2 Enterprises at (888) 542-9390.

Managing Documents in the Cloud		
1/13/14	7:30am - 11:00am	\$100.00
Top 15 All-Time Excel Hints and Tips		
1/13/14	4:10pm - 7:40pm	\$100.00
Federal Tax Update		
1/14/14	7:30am - 11:00am	\$100.00
Accounting & Auditing Update		
1/14/14	4:10pm - 7:40pm	\$100.00
Tech Update		
1/15/14	7:30am - 11:00am	\$100.00
Office 2013 and Windows 8		
1/15/14	4:10pm - 7:40pm	\$100.00
PAYMENT DUE AT TIME OF REGISTRATION		

Hotel Accommodations: Reservations can be made by calling Beaver Run Resort at 1-800-525-2253 and identifying as being part of the Colorado Society of CPAs CPE & Ski group and/or K2 Enterprises CPE & Ski group code: CPA44X www.k2e.com/ski

CONTINUING PROFESSIONAL EDUCATION

JUNE, 2013

June 3, 2013

Monday

Ridgeland

NEW

MSCPA Center

Why You Need to Know Something About Fraud and Internal Controls

Discussion Leader: Donna Ingram, CPA, CFE, CRFA

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

NEW

Course Hours: 8:30-12

LEVEL: Intermediate **CPE Credit:** 4 A&A **VENDOR:** Self-developed **ACRONYM:** KFIC4-3

COURSE OBJECTIVES AND DESCRIPTION: Whether you are an auditor, tax preparer, controller or member of management with financial responsibilities you play an important role in helping prevent and detect fraud. We often get too involved in our routine activities or assume it is someone else's job to detect fraud. This mindset can be costly. This course will increase your awareness of fraud schemes and red flags that may indicate fraud exists. The importance of internal controls will also be emphasized. Actual fraud stories will be shared so that you can learn from the experiences of others.

June 3, 2013

Monday

Ridgeland

NEW

MSCPA Center

Fraud Happened . . . Now What?

Discussion Leader: Donna Ingram, CPA, CFE, CRFA

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

NEW

Course Hours: 1:00-4:30

LEVEL: Intermediate **CPE Credit:** 4 A&A **VENDOR:** Self-developed **ACRONYM:** FHNW4-2

COURSE OBJECTIVES AND DESCRIPTION: In this course you will step into the shoes of the investigator engaged to uncover the facts (who, how, and how much) of a fraudulent crime. Many small businesses have limited resources for sophisticated systems of internal controls to exist; and when this is coupled with a lack of management oversight, company assets are exposed to increased risk of theft and abuse. You will have an opportunity to expose system weaknesses and develop system enhancements that will not only apply in the sample case, but can be recommended in real life, too.

June 4, 2013

Tuesday

Ridgeland

NEW

MSCPA Center

Preparing OCBOA Financial Statements – Cash, Modified Cash, and Tax Basis

Discussion Leader: Doug Logan, CPA

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 8:30-12

LEVEL: Basic **CPE Credit:** 4 A&A **VENDOR:** Surgent-McCoy **ACRONYM:** CMT4-1

COURSE OBJECTIVES AND DESCRIPTION: For many businesses, preparing financial statements, using an Other Comprehensive Basis of Accounting (OCBOA, or the new audit terminology "Special Purpose Framework") may provide an alternative to the complexity of U.S. GAAP. This course will provide you with an overview and hands-on application for preparing and reporting on OCBOA financial statements. You will learn the unique measurement and disclosure requirements of various OCBOA options using example financial statements and illustrative disclosures. The course will also guide you through OCBOA engagements, highlighting common practice issues. You will also be kept up-to-date on the AICPA's planned development of OCBOA for small- and medium-sized entities. ** SUBSTITUTED FOR CL4CTB **

June 4, 2013

Tuesday

Ridgeland

MSCPA Center

Efficient Small Business Audits: Getting the Best Results for Your Small Business Client

Discussion Leader: Doug Logan, CPA

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 1:00-4:30

LEVEL: Intermediate **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4SBAB-1

COURSE OBJECTIVES AND DESCRIPTION: Auditors of small business need to understand and assess the typically limited internal control structure of the small business in order to conduct efficient and effective audits of financial statements. This course prepares you to efficiently assess the audit ability of accounting records and management integrity, apply analytical procedures to planning and substantive tests, and design audit programs to consider the timing and extent of testing.

June 5, 2013

Wednesday

Ridgeland

NEW

MSCPA Center

Individual Tax Planning Ideas for 2013

Discussion Leader: Peter J. Towle, CPA, J.D., LL.M.

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

NEW

Course Hours: 8:30-12

LEVEL: Intermediate **CPE Credit:** 4 Tax **VENDOR:** Surgent-McCoy **ACRONYM:** ITP4

COURSE OBJECTIVES AND DESCRIPTION: In the fluid economic environment, clients must protect their income from taxes. This course presents the most important income tax planning ideas wealthy clients and closely-held business owners need to consider in 2013 to take advantage of the present and plan for the future. It highlights areas in the income tax return that suggest future opportunities for the individual client. Highlights: Review current tax proposals; Reading a tax return for developing client-specific tax strategies; Compensation and fringe benefit issues; Is the client in the right mix of investment vehicles? All in the family: Tax tactics for spouses, children, and parents; What is new in health care that CPAs need to know.

June 5, 2013

Wednesday

Ridgeland

NEW

MSCPA Center

Mastering Basis Issues for S Corporations, Partnerships, and LLCs

Discussion Leader: Peter J. Towle, CPA, J.D., LL.M.

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

NEW

Course Hours: 1:00-4:30

LEVEL: Intermediate **CPE Credit:** 4 Tax **VENDOR:** Surgent-McCoy **ACRONYM:** HMB4

COURSE OBJECTIVES AND DESCRIPTION: The most difficult concepts to master when dealing with flow-through business entities are the basis and distribution concepts. Major error and malpractice issues occur if the CPA does not fully understand the impact of these rules. This course is designed to focus on the practical applications of these rules. Participants will learn how to determine initial basis and organizing tax-free under §351 and §721, and understand what affects basis and how to treat distributions.

June 6, 2013

Thursday

Ridgeland

NEW

MSCPA Center

Partnerships and LLCs: Avoiding Common Pitfalls Facing Practitioners**Discussion Leader:** Peter J. Towle, CPA, J.D., LL.M.**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**NEW****Course Hours:** 8:30-12**LEVEL:** Intermediate **CPE Credit:** 4 Tax **VENDOR:** Surgent-McCoy **ACRONYM:** BTP4

COURSE OBJECTIVES AND DESCRIPTION: Have you ever left a CPE seminar wishing you had learned something that would really help your bottom line? This course is designed to provide innovative, real-world ideas that will increase revenue for you, your firm or company, and your clients. Find out the answers to tough questions regarding tax planning and strategies for the limited liability company and partnership clients, and learn how to apply key techniques to make more money.

June 6, 2013

Thursday

Ridgeland

NEW

MSCPA Center

Critical Tax Issues in Buying and Selling a Business**Discussion Leader:** Peter J. Towle, CPA, J.D., LL.M.**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**NEW****Course Hours:** 1:00-4:30**LEVEL:** Intermediate **CPE Credit:** 4 Tax **VENDOR:** Surgent-McCoy **ACRONYM:** BSB4

COURSE OBJECTIVES AND DESCRIPTION: One of the major transactions CPA clients enter into is the purchase or disposition of a business. To help tax professionals in advising those clients, this course offers a detailed analysis of the tax considerations of a business acquisition both from the buyer's and the seller's perspectives, and structural issues in its financing.

June 6, 2013

Thursday

Ridgeland

Embassy Suites

MAP CONFERENCE**Discussion Leader:** PANEL**Cost:** Members: \$75 Non-Members: \$115 AICPA Member Discount: \$0**Course Hours:****LEVEL:** Update **CPE Credit:** 4 General **VENDOR:** n/a **ACRONYM:** MAP

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.

June 7, 2013

Friday

Ridgeland

MSCPA Center

Ethics, Rules & Regulations**Discussion Leader:** William F. (Bill) Taylor, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 8:30-12**LEVEL:** Update **CPE Credit:** 4 Ethics **VENDOR:** Self-developed **ACRONYM:** ERR-5

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.

June 7, 2013

Friday

Ridgeland

NEW

MSCPA Center

New Medicine: Key Issues CPAs Need to Know About the Patient Protection and Affordable Care Act**Discussion Leader:** William F. (Bill) Taylor, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**NEW****Course Hours:** 1:00-4:30**LEVEL:** Update **CPE Credit:** 4 Tax **VENDOR:** Surgent-McCoy **ACRONYM:** NME4-1

COURSE OBJECTIVES AND DESCRIPTION: Now that the Supreme Court has upheld the constitutionality of the Patient Protection and Affordable Care Act, CPAs and other tax advisors need to understand the tax and health insurance related changes contained in that legislation, many of which begin in 2013. This legislation has important implications for employers' health care plans, and contains significant tax law changes that affect individual and business clients. This course will focus on the key issues and planning strategies that CPAs and other tax practitioners need to know in order to advise their clients regarding this far-reaching legislation. Detailed examination of the proposed regulations on the additional taxes on unearned income and earned income beginning in 2013 is included.

June 10, 2013

Monday

Ridgeland

Holmes Comm. Coll.

Compilation, Review, and Accounting Service Update**Discussion Leader:** James R. (Jim) Crockett, CPA, DBA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 8:30-12**LEVEL:** Advanced **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4COMP2

COURSE OBJECTIVES AND DESCRIPTION: If you supervise compilation, review, and accounting service engagements, this course will help you comply with the professional standards by keeping you informed of the latest developments and issues relevant to these engagements. Learn about SSARS developments, quality control issues, OCBOA disclosures, FASB codification, IFRS, and other areas affecting compilation, review, and accounting service engagements. Upon completion of this course, participants will be able to discuss: Overview of Compilation and Review Guidance; Recent SSARS Developments; Accounting and Reporting Issues; Current and Future Standard Setting Projects.

June 10, 2013

Monday

Ridgeland

MSCPA Center

Divorce Taxation**Discussion Leader:** Dennis J. Gerschick, CPA, JD, CFE**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 8:30-12**LEVEL:** Update **CPE Credit:** 4 Tax **VENDOR:** Regal Seminars **ACRONYM:** DIVT

COURSE OBJECTIVES AND DESCRIPTION: Unfortunately, many marriages end in divorce which not only affects the spouses but also their children. A divorce can have significant tax implications because property must be divided and money may be paid out for alimony and child support. This seminar will provide an excellent overview of the major tax issues and will address them from the perspective of the payer and the recipient. Topics include: pre-divorce tax planning; taxation of alimony and child support; treatment of voluntary payments; consequences of post-divorce sale of the principal residence; explanation of the innocent spouse rules; tax filing status of each spouse; who can claim tax exemptions for the children; post-divorce tax planning; lessons learned from court cases and IRS rulings; and more.

June 10, 2013**Advanced Compilation and Review Issues: Advanced Issues in Compilation, Review, and Accounting Services**

Monday
Ridgeland
Holmes Comm. Coll.

Discussion Leader: James R. (Jim) Crockett, CPA, DBA
Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0
Course Hours: 1:00-4:30
LEVEL: Advanced **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4CRA-2

COURSE OBJECTIVES AND DESCRIPTION: If you supervise compilation, review, and accounting service engagements, this course will keep you informed of the most prevalent advanced management and administrative issues with these engagements. This course contains many case studies to reinforce best practices for managing the accounting, reporting, and performance issues with compilation, review and accounting service engagements. Upon completion of this course, participants will be able to discuss: Guidance for Compilations and Reviews; Accounting and Reporting Issues; Engagement Administrative and Performance Issues; OCBOA Financial Statement Issues; Latest Developments.

June 10, 2013**Employment Law - A Primer for Accountants and Executives**

Monday
Ridgeland **NEW**
MSCPA Center

Discussion Leader: Dennis J. Gerschick, CPA, JD, CFE
Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0 **NEW**
Course Hours: 1:00-4:30
LEVEL: Intermediate **CPE Credit:** 4 General **VENDOR:** Regal Seminars **ACRONYM:** EMPL

COURSE OBJECTIVES AND DESCRIPTION: This half day course will address a number of employment law issues that everyone in business should be aware of. Learning objectives: Describe what constitutes racial, age, and sexual discrimination; Explain what is sexual harassment; Note when overtime compensation must be paid and when it does not; Summarize an employee's right to privacy; Provide tips for hiring, compensating, evaluating, and terminating employees; and a Highlight of the pros and cons of using an employee handbook.

June 11, 2013**Analyzing a Business and Its Financial Statements**

Tuesday
Ridgeland **NEW**
MSCPA Center

Discussion Leader: Dennis J. Gerschick, CPA, JD, CFE
Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0 **NEW**
Course Hours: 8:30-12
LEVEL: Basic **CPE Credit:** 4 A&A **VENDOR:** Regal Seminars **ACRONYM:** ABFS

COURSE OBJECTIVES AND DESCRIPTION: This course will explain how to analyze a business and its financial statements to help you make better business or investment decisions. Learn how to determine if the business is improving or declining. Pick up tips on how to find the areas that need improvement. Learn how to read between the lines. For example: Should you invest in a particular company? Should a company expand its business or contract? Should credit be extended to a customer? Numerous practical tips will be provided.

June 11, 2013**Business Valuation - A Guide for the Non-Specialist**

Tuesday
Ridgeland **NEW**
MSCPA Center

Discussion Leader: Dennis J. Gerschick, CPA, JD, CFE
Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0 **NEW**
Course Hours: 1:00-4:30
LEVEL: Basic **CPE Credit:** 4 General **VENDOR:** Regal Seminars **ACRONYM:** BVNS

COURSE OBJECTIVES AND DESCRIPTION: Every CPA, whether in public accounting or in industry, should be familiar with the principles of valuing a closely-held business, even if they don't specialize in this area. This course will provide a summary of each of the major methods used to value a private business and will also provide an excellent overview of the valuation process. Participants will discuss how to: Identify the information needed to value a private company; Explain why the value of a private company can vary depending upon the purpose of the valuation; Summarize how the capitalization of the earnings method works; Describe how the discounted future earnings method works; Note when the comparable company method should be used; List the advantages, and disadvantages of each valuation method; Point out how a company's assets affect the valuation; Identify the premiums and discounts that are frequently used; and Evaluate who is qualified to value a private company.

June 11, 2013**Excel Financial Reporting and Analysis**

Tuesday
Ridgeland
Holmes Comm. Coll.

Discussion Leader: Thomas G. Stephens, Jr., CPA, CITP
Cost: Members: \$270 Non-Members: \$345 AICPA Member Discount: \$0
Course Hours: 8:30-4:30
LEVEL: Advanced **CPE Credit:** 8 A&A **VENDOR:** K2 Enterprises **ACRONYM:** EFR

COURSE OBJECTIVES AND DESCRIPTION: Microsoft Excel is a powerful tool for analyzing financial data and preparing financial reports; but like most powerful tools, it contains hidden features and functionality useful for these purposes that are not obvious to users, both novice and expert alike. The purpose of this course is to uncover these hidden features so that users may prepare computationally accurate and aesthetically pleasing reports in a more effective and efficient manner. It provides solutions for accountants in the following six major topic areas: advanced techniques for formatting reports and financial statements, assembly and printing of reports and schedules, using templates to automate reporting processes, advanced financial analysis with PivotTables connected to the General Ledger using ODBC, data consolidation, and using charts and digital dashboards for presenting financial information. Participants will have access to sample data files. This course includes coverage of features found in Excel 2003, 2007, and 2010. For more details and a complete list of course highlights, please visit www.k2e.com/efr.

June 12, 2013**Creating the Best Projections You Can: Insights and Techniques**

Wednesday
Ridgeland
MSCPA Center

Discussion Leader: John F. Levy, MBA, CPA
Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0
Course Hours: 8:30-12
LEVEL: Intermediate **CPE Credit:** 4 A&A **VENDOR:** Executive Education **ACRONYM:** CBP

COURSE OBJECTIVES AND DESCRIPTION: This course will examine current best practices in preparing budgets and projections and look at the critical roles of strategic planning and risk management in developing the best projections you can! Other topics: How (or whether) to consider the past in company budgeting; The many purposes and types of budgets and projections and how the many uses of budgets and projections can cause distortions; How benchmarking and metrics have changed the budget process; The role of "black swans" in preparing and evaluating projections and budgets. The course material includes group discussion and case studies.

June 12, 2013

Wednesday

Ridgeland

NEW

MSCPA Center

Financial Analysis in a Metrics Driven World: "Run the Numbers Effectively"**Discussion Leader:** John F. Levy, MBA, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**NEW****Course Hours:** 1:00-4:30**LEVEL:** Intermediate **CPE Credit:** 4 A&A **VENDOR:** Executive Education **ACRONYM:** FAMD

COURSE OBJECTIVES AND DESCRIPTION: Financial ratios are an old-fashioned financial analysis tool. Learn how to do a better job analyzing your company's performance by combining both financial and non-financial data. This session gives you the opportunity to collaborate with other professionals in a hands-on, interactive setting. Seminar topics include: Why a quick analysis can be dead wrong; Why you must "scrub the numbers" to understand economic reality; Use of balanced metrics to point your whole company in the same direction; and more. This seminar includes group discussion of three cases.

June 12, 2013**QuickBooks Advanced Features, Tools, and Techniques**

Wednesday

Ridgeland

Holmes Comm. Coll.

Discussion Leader: Thomas G. Stephens, Jr., CPA, CITP**Cost:** Members: \$270 Non-Members: \$345 AICPA Member Discount: \$0**Course Hours:** 8:30-4:30**LEVEL:** Advanced **CPE Credit:** 8 A&A General **VENDOR:** K2 Enterprises **ACRONYM:** ADQ

COURSE OBJECTIVES AND DESCRIPTION: This advanced course is designed for those who are experienced with QuickBooks and who are looking for insight on how to deal with the more difficult issues that users often face. The course includes coverage of techniques and features of which even advanced users are often not aware as well as useful workarounds for common problems. Some of the key topics covered are: the best ways to exchange QuickBooks data with others, inventory accounting issues and solutions, tracking and managing sales taxes, working with and resolving payroll issues, advanced financial and operational reporting matters, job costing, time tracking, and much more. If you are an experienced QuickBooks user and want to get more out of the product for your company and/or your clients, you need this course. Topics include: Exchanging data with others; Managing inventory with QuickBooks; Estimating and job costing in QuickBooks; Using QuickBooks to track and manage sales taxes; Working with QuickBooks payroll; Advanced reporting issues; Integrating QuickBooks with other applications. For more details and a complete list of course highlights, please visit <http://www.k2e.com/adq>.

June 13, 2013

Thursday

Ridgeland

NEW

Holmes Comm. Coll.

The Mobile Office**Discussion Leader:** Thomas G. Stephens, Jr., CPA, CITP**Cost:** Members: \$270 Non-Members: \$345 AICPA Member Discount: \$0**NEW****Course Hours:** 8:30-4:30**LEVEL:** Intermediate **CPE Credit:** 8 General **VENDOR:** K2 Enterprises **ACRONYM:** MOB

COURSE OBJECTIVES AND DESCRIPTION: Mobile devices and applications have changed the way we work, play, and collaborate with others. Many organizations are allowing employees to access corporate data and networks using both corporate and personally owned cell phones, tablets, and computers. Access to data stored in the cloud or on corporate networks using inexpensive devices such as smart phones and tablets permits employees to work from anywhere. Tasks which recently required access to a personal computer such as reading and responding to email, accepting credit cards, scanning documents, accessing data on corporate networks, and videoconferencing can now be accomplished with mobile devices from almost anywhere. In this seminar, participants will learn about the benefits and risks associated with smart phones, tablets, and employee-owned computers, and will learn ways these devices can make workers more productive. In addition, participants will learn about various software applications and services that enable mobile desktops and sharing and synchronizing data across multiple devices, including desktops, laptops, smart phones, and tablets. This course is new for 2013! For more details and a complete list of course highlights, please visit www.k2e.com/mob.

June 13, 2013

Thursday

Ridgeland

NEW

MSCPA Center

Corporate Finance Check-up: Renovate Your Analytical Toolbox**Discussion Leader:** John F. Levy, MBA, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**NEW****Course Hours:** 9:00-5:00**LEVEL:** Overview **CPE Credit:** 8 General **VENDOR:** Executive Education **ACRONYM:** CFC

COURSE OBJECTIVES AND DESCRIPTION: Understanding how the use of common corporate finance tools is a skill that separates those who will become Chief Financial Officers from those who will always remain accountants. Topics include: Internal & External Financial Statement Analysis; The CFO and Integrated Planning; The finance role in strategic planning; Why it's a financial plan not a budget; Operating Metrics for Success; Tracking performance results; 10 tips for banker selection; Sustaining an effective banking relationship; Forecasting as a Valuation Tool; Using the capital asset pricing model; Cash flow and earnings valuation models; 10 Steps for Keeping the Toolbox Full; and Cases and Group Discussion. This seminar includes six cases and exercises for group discussion.

June 14, 2013

Friday

Ridgeland

MSCPA Center

Financial Reporting: Turn Information Into Action!**Discussion Leader:** John F. Levy, MBA, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**Course Hours:** 9:00-5:00**LEVEL:** Intermediate **CPE Credit:** 8 A&A **VENDOR:** Executive Education **ACRONYM:** FR

COURSE OBJECTIVES AND DESCRIPTION: Financial managers at all levels produce volumes of reports every year. Unfortunately, not all of these reports generate an equivalent degree of action! Learn how to plan, process, and effectively present financial information. This seminar provides answers for accountants who want to become better catalysts for action. Learn directly from professionals who know how to generate actionable responses to their reports. If you wish to have a greater impact on your organization and your career, you cannot afford to miss this critically important and interactive program.

June 17, 2013

Monday

Gulfport

Great Southern Club

Write-up, Payroll, and Other Accounting Services: Managing the Risks**Discussion Leader:** Doug Logan, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 8:30-12**LEVEL:** Intermediate **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4BPOA

COURSE OBJECTIVES AND DESCRIPTION: Most sole practitioners and local CPA firms routinely provide write-up, payroll, and other accounting services to their clients. Although these engagements involve no technical standards or issued opinions, they are not risk-free. They have generated a surprising number of malpractice claims. This course identifies the risks and mitigating practices throughout the life-cycle of an accounting services engagement, from client acceptance to

engagement performance to withdrawal. Upon completion of this course, participants will be able to discuss: Common Risks and Mitigating Techniques; Engagement Planning and Administration; Engagement Letters; Engagement Performance; Fraud and Internal Control, and more.

June 17, 2013

Monday

Gulfport

Great Southern Club

IPad - An Effective Business Tool

Discussion Leader: William C. (Will) Fleenor, CPA, PhD

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 8:30-12

LEVEL: Intermediate **CPE Credit:** 4 General **VENDOR:** K2 Enterprises **ACRONYM:** IPA4-1

COURSE OBJECTIVES AND DESCRIPTION: Moving beyond the hype, Apple's iPad has all the potential to serve as a serious business tool. Not only can you use the iPad to access traditional resources, such as your corporate network and email; but you can also use it to create, communicate, and collaborate in ways that you may not have considered possible even just six months ago. In this fast-paced, four-hour seminar, you will learn how to put the iPad to work, exploring key business issues such as security, connecting to the Cloud, and how to work with common file formats, including PDF documents, Excel spreadsheets, and Word documents. Whether you already own an iPad or are considering acquiring one, you need this course to ensure that you maximize the return on your investment. For more details and a complete list of course highlights, please visit www.k2e.com/ipa-4.

June 17, 2013

Monday

Gulfport

Great Southern Club

Preparing OCBOA Financial Statements – Cash, Modified Cash, and Tax Basis

Discussion Leader: Doug Logan, CPA

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 1:00-4:30

LEVEL: Basic **CPE Credit:** 4 A&A **VENDOR:** Surgent-McCoy **ACRONYM:** CMT4-2

COURSE OBJECTIVES AND DESCRIPTION: For many businesses, preparing financial statements, using an Other Comprehensive Basis of Accounting (OCBOA, or the new audit terminology "Special Purpose Framework") may provide an alternative to the complexity of U.S. GAAP. This course will provide you with an overview and hands-on application for preparing and reporting on OCBOA financial statements. You will learn the unique measurement and disclosure requirements of various OCBOA options using example financial statements and illustrative disclosures. The course will also guide you through OCBOA engagements, highlighting common practice issues. You will also be kept up-to-date on the AICPA's planned development of OCBOA for small- and medium-sized entities. **** SUBSTITUTED FOR CL4CTB ****

June 17, 2013

Monday

Gulfport

Great Southern Club

Excel Tables - Revolutionize How You Work With Excel

Discussion Leader: William C. (Will) Fleenor, CPA, PhD

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 1:00-4:30

LEVEL: Intermediate **CPE Credit:** 4 General **VENDOR:** K2 Enterprises **ACRONYM:** EXT-4

COURSE OBJECTIVES AND DESCRIPTION: Added to Excel with the 2007 release, Tables are one of Excel's best features about which most users know very little and, therefore, fail to experience the benefits of working with this great feature. Much more than just a formatting tool, Tables will revolutionize how you work with data in Excel. Tables can serve as data sources that automatically and dynamically re-size to match the volume of data under analysis; Tables provide a simplified means of writing formulas known as Structured Referencing; Tables contain advanced filtering and sorting capabilities; and Tables streamline the process of working with large volumes of data. If you are using Excel 2007 or Excel 2010 and are not working with Tables, then you need this four-hour course to increase your efficiency and proficiency with Excel. For more details and a complete list of course highlights, please visit www.k2e.com/ext-4.

June 17, 2013

Monday

Ridgeland

MSCPA Center

How to Settle an Estate For a Client from A to Z

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

Cost: Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0

Course Hours: 9:00-5:00

LEVEL: Basic **CPE Credit:** 8 Tax **VENDOR:** Surgent-McCoy **ACRONYM:** SEAZ

COURSE OBJECTIVES AND DESCRIPTION: Federal estate and gift taxes currently affect few clients, but there are many other issues involved in settling an estate or administering a trust. Clients who are beneficiaries of a trust or estate often turn to their financial advisors to understand the administrative process and its effect on their interests. This course enables the accountant to cut through the jargon to understand the legal concepts, communicate a real-world explanation to clients, and serve, in some instances, as an executor or trustee or as an advisor to them. After taking this course, practitioners will feel more confident about serving in a fiduciary capacity.

June 18, 2013

Tuesday

Gulfport

Great Southern Club

NEW

Technology Update

Discussion Leader: William C. (Will) Fleenor, CPA, PhD

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 8:30-12

LEVEL: Intermediate **CPE Credit:** 4 General **VENDOR:** K2 Enterprises **ACRONYM:** TUP4-1

COURSE OBJECTIVES AND DESCRIPTION: Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the cloud, security, and other technology-related issues? If you answered "yes" to any of these questions, then make plans now to invest four hours in this fast-paced and highly informative seminar that is sure to ramp up your return on technology investment. The technology tools available to all have never been better, but many are not taking full advantage of these tools. This course helps professionals at all levels understand the major trends in hardware, software, and services and how to utilize these tools to meet organizational objectives both efficiently and effectively. More than just a seminar on the latest computers, you will learn about the full spectrum of practical technology available to you and your team and how to implement these tools for maximum impact. This course is new for 2013! For more details and a complete list of course highlights, please visit www.k2e.com/tup-4.

June 18, 2013

Tuesday

Gulfport

Great Southern Club

Ethics, Rules & Regulations

Discussion Leader: James R. (Jim) Crockett, CPA, DBA

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 8:30-12

LEVEL: Update **CPE Credit:** 4 Ethics **VENDOR:** Self-developed **ACRONYM:** ERR-6

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.

June 18, 2013

Tuesday

Gulfport

Great Southern Club

PDF Forms - What Accountants Need to Know

Discussion Leader: William C. (Will) Fleenor, CPA, PhD

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 1:00-4:30

LEVEL: Intermediate **CPE Credit:** 4 General **VENDOR:** K2 Enterprises **ACRONYM:** PDF4-1

COURSE OBJECTIVES AND DESCRIPTION: You've worked with PDF files for years, but did you know that you can quickly and easily turn routine forms into interactive, fill-in PDF documents? Imagine converting timesheets, expense reports, job applications, time-off requests, and all of your other forms into interactive PDF documents that are automatically distributed. Now, also imagine responses collected and summarized using just a few keystrokes. Additionally, think about extending this functionality to transactional documents such as estimates, invoices, and purchase orders so that these documents can be prepared as interactive PDF forms and then imported into leading accounting applications, including QuickBooks. In this half-day seminar, you will learn about the near limitless possibilities associated with PDF forms. You will learn how to create PDF forms from existing paper forms, existing electronic forms, and even from scratch. You will also learn how to add calculations to your forms and how to automate the process of distributing forms, collecting responses, and summarizing the responses in one file. For more details and a complete list of course highlights, please visit www.k2e.com/pdf-4.

June 18, 2013

Tuesday

Gulfport

NEW

Great Southern Club

Current Issues in Accounting and Auditing: An Annual Update

Discussion Leader: James R. (Jim) Crockett, CPA, DBA

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 1:00-4:30

LEVEL: Update **CPE Credit:** 4 A&A **VENDOR:** Surgent-McCoy **ACRONYM:** AAU4-1

NEW

COURSE OBJECTIVES AND DESCRIPTION: Designed for accounting and auditing practitioners at all levels in both public accounting and business and industry, this course provides an overview of the new and recent pronouncements issued by the FASB, ASB, and ARSC. This course will bring you up-to-date on the standard setters' activities and provide you with examples and illustrations to help you apply the guidance in practice. You'll learn about the latest standards, exposure drafts and guidance focusing on issues applicable to accountants and auditors in public accounting and private industry. This course also includes a compilation and review update and current audit risk alert summary.

June 18, 2013

Fraud and Abuse in Not-for-Profit Entities and Governments: Stealing from Everyone

Discussion Leader: Bill Wagner, CPA

Cost: Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 A&A YB **VENDOR:** Surgent-McCoy **ACRONYM:** FANG

NEW

COURSE OBJECTIVES AND DESCRIPTION: When not-for-profit entities and governments fall prey to fraud and abuse, it breaks the hearts of donors and taxpayers. Fraud and abuse also causes donors and taxpayers to lose confidence in those not-for-profit entities and governments. In this course, we will focus on the common types of fraud and abuse that occur in not-for-profit entities and governments and also address the auditor's responsibilities related to fraud and abuse. The course materials utilize a highly illustrative format to increase concept comprehension and retention.

June 19, 2013

Why You Need to Know Something About Fraud and Internal Controls (Cancelled)

June 19, 2013

Fraud Happened Now What? (Cancelled)

June 19, 2013

Wednesday

Gulfport

NEW

Great Southern Club

What Accountants Should Know About Fraud

Discussion Leader: James R. (Jim) Crockett, CPA, DBA

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 8:30-12:00

LEVEL: Intermediate **CPE Credit:** 4 A&A **VENDOR:** Self-developed **ACRONYM:** WAKF

NEW

COURSE OBJECTIVES AND DESCRIPTION: The seminar will include discussion on: types of fraud, traits of those likely to commit fraud, fraud prevention – systems design and internal controls, Professional audit standards related to fraud, the fraud triangle, red flags, detection techniques, and what to do if you encounter fraud. **NOTE:** Due to a scheduling conflict, Donna Ingram will be unavailable. Dr. Crockett will teach this seminar in the morning. Nothing is currently planned for the afternoon.

June 19, 2013

Excel Best Practices

Discussion Leader: William C. (Will) Fleenor, CPA, PhD

Cost: Members: \$270 Non-Members: \$345 AICPA Member Discount: \$0

Course Hours: 8:30-4:30

LEVEL: Intermediate **CPE Credit:** 8 General **VENDOR:** K2 Enterprises **ACRONYM:** EBP-1

NEW

COURSE OBJECTIVES AND DESCRIPTION: As spreadsheets continue to evolve, so too must your practices for creating, editing, and auditing them. In this program, you will gain an in-depth understanding of the best ways to work with Excel. The topics covered in this seminar include best practices associated with Excel spreadsheets in each of the following areas: creating and editing Excel workbooks, securing Excel workbooks, collaborating with others in Excel, and reporting on data contained in Excel. Today's best practices for Excel differ significantly from those used in the past and you will learn the best ways to work with Excel spreadsheets in this "must see CPE" program. Course materials include relevant examples to enhance your learning experience. Participate in this program to help ensure that you utilize Excel to its fullest potential. This course covers features in Excel found in versions 2007 and higher and is new for 2013. For more details and a complete list of course highlights, please visit www.k2e.com/ebp.

June 19, 2013

Wednesday

Accounting and Reporting for Not-for-Profits: Issues and Answers

Discussion Leader: Bill Wagner, CPA

Ridgeland **NEW** **Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0 **NEW**
MSCPA Center **Course Hours:** 9:00-5:00
LEVEL: Intermediate **CPE Credit:** 8 A&A YB **VENDOR:** Surgent-McCoy **ACRONYM:** ARNP
COURSE OBJECTIVES AND DESCRIPTION: Not-for-profits are operating in an increasingly competitive environment for resources. To help garner the attention and confidence of resource providers, it is crucial that their financial reporting be accurate. The purpose of this course is to improve and refine your not-for-profit accounting and reporting skills. Obtain an in-depth understanding of the key requirements and how they are applied. The course materials utilize a highly illustrative format to increase concept comprehension and retention.

June 20, 2013 **Latest Developments in Government & Nonprofit Accounting & Auditing in 2013**

Thursday
Ridgeland **NEW** **Discussion Leader:** Bill Wagner, CPA
MSCPA Center **Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0 **NEW**
Course Hours: 9:00-5:00
LEVEL: Update **CPE Credit:** 8 A&A YB **VENDOR:** Surgent-McCoy **ACRONYM:** GNAA

COURSE OBJECTIVES AND DESCRIPTION: With five active standard setters (GAO, OMB, AICPA, GASB, and FASB), there are always important developments occurring in government and nonprofit accounting and auditing. Time is valuable, and it's hard to stay current in today's rapidly changing environment. Let us save you time and effort in staying current through this informative update course. The purpose of this course is to enable you to excel in the constantly changing government and nonprofit environment. The course materials utilize a highly illustrative format to increase concept comprehension and retention. Continuing issues and challenges involving implementation of the 2011 Yellow Book revision. Major Topics include: Recent developments in OMB A-133 Single Auditing; Navigating your way through implementation of the AICPA's Clarified Auditing Standards; Key AICPA activities related to governments and nonprofits; Recent GASB activities; and Recent FASB activities related to nonprofits.

June 21, 2013 **OMB A-133 from A to Z**
Friday **Discussion Leader:** Bill Wagner, CPA
Ridgeland **NEW** **Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0 **NEW**
MSCPA Center **Course Hours:** 9:00-5:00
LEVEL: Intermediate **CPE Credit:** 8 A&A YB **VENDOR:** Surgent-McCoy **ACRONYM:** A133

COURSE OBJECTIVES AND DESCRIPTION: To properly communicate, one must know all the letters of the alphabet and rules on how they fit together. To properly perform Single Audits, one must know all of the OMB Circular A-133 audit elements and rules on how they fit together. The purpose of this course is to make sure your Single Auditing skills stand out in this challenging audit area. The course materials utilize a highly illustrative format to increase concept comprehension and retention.

June 24, 2013 **Excel Macros - Part 1**
Monday **Discussion Leader:** Robert H. (Bob) Spencer, PhD
Ridgeland **Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0
Holmes Comm. Coll. **Course Hours:** 8:30-12
LEVEL: Basic **CPE Credit:** 4 General **VENDOR:** K2 Enterprises **ACRONYM:** EXM-4

COURSE OBJECTIVES AND DESCRIPTION: You have used Excel for years and Lotus prior to that. During this time, you have said repeatedly, "One day, I'll learn how to write macros." Well, that time has arrived because this four-hour program will introduce you to the wide world of macros and Visual Basic for Applications (VBA) in Excel. Designed for those with little, if any, experience working with macros, this course teaches the fundamentals of creating and working with macros in Excel. In this seminar, you will learn how to use Excel's Macro Recorder to write simple, yet effective, macros; how to secure and share macros with other Excel users; how to create user-defined functions to solve specific accountant-centric problems in Excel; and how to create macros that run automatically when a user opens a workbook. You will also learn the basics of VBA, including many necessary elements to write macros that can make you and your team more effective and productive with Excel. Don't miss this unique opportunity to learn how to begin working with macros – one of Excel's most powerful. For more details and a complete list of course highlights, please visit www.k2e.com/exm-4.

June 24, 2013 **Technology Update**
Monday **Discussion Leader:** Robert H. (Bob) Spencer, PhD
Ridgeland **NEW** **Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0 **NEW**
Holmes Comm. Coll. **Course Hours:** 1:00-4:30
LEVEL: Intermediate **CPE Credit:** 4 General **VENDOR:** K2 Enterprises **ACRONYM:** TUP4-2

COURSE OBJECTIVES AND DESCRIPTION: Are you ready to learn about the latest trends in technology? Do you sometimes feel lost in the technology jungle? Would you like clear guidance regarding Windows, Office, the cloud, security, and other technology-related issues? If you answered "yes" to any of these questions, then make plans now to invest four hours in this fast-paced and highly informative seminar that is sure to ramp up your return on technology investment. The technology tools available to all have never been better, but many are not taking full advantage of these tools. This course helps professionals at all levels understand the major trends in hardware, software, and services and how to utilize these tools to meet organizational objectives both efficiently and effectively. More than just a seminar on the latest computers, you will learn about the full spectrum of practical technology available to you and your team and how to implement these tools for maximum impact. This course is new for 2013! For more details and a complete list of course highlights, please visit www.k2e.com/tup-4.

June 24, 2013 **Shortcuts to Tax Cuts: Individual Tax, Social Security, and Retirement Planning Tools and Strategies**
Monday **Discussion Leader:** William F. (Bill) Taylor, CPA
Ridgeland **NEW** **Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0 **NEW**
MSCPA Center **Course Hours:** 9:00-5:00
LEVEL: Intermediate **CPE Credit:** 8 Tax **VENDOR:** Surgent-McCoy **ACRONYM:** TXCU

COURSE OBJECTIVES AND DESCRIPTION: In this fluid economic environment, clients must protect their income from taxes, their retirement and college funds from inadequacy, and their Social Security from less-than-optimal benefits. This course presents the most important planning ideas wealthy clients and closely held business owners need to consider in 2013 to take advantage of the present and plan for the future with checklists designed to determine which areas are best for the client.

June 25, 2013

Tuesday
Ridgeland
Holmes Comm. Coll.

IPad - An Effective Business Tool

Discussion Leader: Robert H. (Bob) Spencer, PhD

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 8:30-12

LEVEL: Intermediate **CPE Credit:** 4 General **VENDOR:** K2 Enterprises **ACRONYM:** IPA4-2

COURSE OBJECTIVES AND DESCRIPTION: Moving beyond the hype, Apple's iPad has all the potential to serve as a serious business tool. Not only can you use the iPad to access traditional resources, such as your corporate network and email; but you can also use it to create, communicate, and collaborate in ways that you may not have considered possible even just six months ago. In this fast-paced, four-hour seminar, you will learn how to put the iPad to work, exploring key business issues such as security, connecting to the Cloud, and how to work with common file formats, including PDF documents, Excel spreadsheets, and Word documents. Whether you already own an iPad or are considering acquiring one, you need this course to ensure that you maximize the return on your investment. For more details and a complete list of course highlights, please visit www.k2e.com/ipa-4.

June 25, 2013

Tuesday
Ridgeland
Holmes Comm. Coll.

PDF Forms - What Accountants Need to Know

Discussion Leader: Robert H. (Bob) Spencer, PhD

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 1:00-4:30

LEVEL: Intermediate **CPE Credit:** 4 General **VENDOR:** K2 Enterprises **ACRONYM:** PDF4-2

COURSE OBJECTIVES AND DESCRIPTION: You've worked with PDF files for years, but did you know that you can quickly and easily turn routine forms into interactive, fill-in PDF documents? Imagine converting timesheets, expense reports, job applications, time-off requests, and all of your other forms into interactive PDF documents that are automatically distributed. Now, also imagine responses collected and summarized using just a few keystrokes. Additionally, think about extending this functionality to transactional documents such as estimates, invoices, and purchase orders so that these documents can be prepared as interactive PDF forms and then imported into leading accounting applications, including QuickBooks. In this half-day seminar, you will learn about the near limitless possibilities associated with PDF forms. You will learn how to create PDF forms from existing paper forms, existing electronic forms, and even from scratch. You will also learn how to add calculations to your forms and how to automate the process of distributing forms, collecting responses, and summarizing the responses in one file. For more details and a complete list of course highlights, please visit www.k2e.com/pdf-4.

June 25, 2013

Tuesday
Ridgeland
MSCPA Center

Determining How Much Money You Need to Retire, and Tax Ideas and Money Management for Retirement

Discussion Leader: Kenneth R. Greenwood, MBA

Cost: Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 Tax **VENDOR:** Surgent-McCoy **ACRONYM:** DRMM

COURSE OBJECTIVES AND DESCRIPTION: The purpose of this course is to give CPAs the tools and knowledge required to help their clients implement tax-effective investment and portfolio strategies for successful wealth accumulation and real after-tax retirement income maintenance. The course discusses a host of specific investment tax planning and money management issues and topics, both before and after retirement, within the broader context of the fundamentals of asset allocation and portfolio management, coordinating retirement plans and taxable saving, advanced tax-adjusted time value principles, and asset risk/return and income-tax relationships.

June 26, 2013

Wednesday
Ridgeland **NEW**
Holmes Comm. Coll.

Performing Compilation and Review Engagements Under SSARS

Discussion Leader: Kurt Oestriecher, CPA

Cost: Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 A&A **VENDOR:** Self-developed **ACRONYM:** PCRE

COURSE OBJECTIVES AND DESCRIPTION: This course is essential for accountants who perform Compilation and Review engagements. The author and instructor served for four years on the Accounting and Review Services Committee of the AICPA, and is a nationally recognized instructor on this topic. You will receive comprehensive instruction on everything you need to know to properly, engage, perform, report, and document your compilation and review engagements.

June 26, 2013

Wednesday
Ridgeland
MSCPA Center

MBA in a Day

Discussion Leader: Kenneth R. Greenwood, MBA

Cost: Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 General **VENDOR:** Surgent-McCoy **ACRONYM:** MBAD

COURSE OBJECTIVES AND DESCRIPTION: The purpose of this course is to help CPAs develop a complete business finance and management background. With this knowledge and these skills, CPAs in industry and public accounting can better manage all aspects of their own businesses while helping their clients make more informed business and financial decisions. Major Topics include: Fundamentals of organizational behavior, decision-making with statistics, finance, marketing principles and concepts, capital budgeting and marginal investment analysis, production management, and learning to be your own economist.

June 27, 2013

Thursday
Ridgeland
Holmes Comm. Coll.

Ethics, Rules & Regulations

Discussion Leader: James R. (Jim) Crockett, CPA, DBA

Cost: Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0

Course Hours: 8:30-12

LEVEL: Update **CPE Credit:** 4 Ethics **VENDOR:** self-developed **ACRONYM:** ERR-7

COURSE OBJECTIVES AND DESCRIPTION: This seminar satisfies the State Board's requirement for three hours of general ethics and one hour of Mississippi law.

June 27, 2013

Thursday

Ridgeland

NEW

Holmes Comm. Coll.

Current Issues in Accounting and Auditing: An Annual Update**Discussion Leader:** James R. (Jim) Crockett, CPA, DBA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**NEW****Course Hours:** 1:00-4:30**LEVEL:** Update **CPE Credit:** 4 **A&A** **VENDOR:** Surgent-McCoy **ACRONYM:** AAU4-2

COURSE OBJECTIVES AND DESCRIPTION: Designed for accounting and auditing practitioners at all levels in both public accounting and business and industry, this course provides an overview of the new and recent pronouncements issued by the FASB, ASB, and ARSC. This course will bring you up-to-date on the standard setters' activities and provide you with examples and illustrations to help you apply the guidance in practice. You'll learn about the latest standards, exposure drafts and guidance focusing on issues applicable to accountants and auditors in public accounting and private industry. This course also includes a compilation and review update and current audit risk alert summary.

June 27, 2013

Thursday

Ridgeland

NEW

MSCPA Center

Identifying and Reporting Control Deficiencies**Discussion Leader:** Kurt Oestriecher, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**NEW****Course Hours:** 8:30-12**LEVEL:** Advanced **CPE Credit:** 4 **A&A** **VENDOR:** Self-developed **ACRONYM:** IRCD4

COURSE OBJECTIVES AND DESCRIPTION: AICPA Auditing Standards require that auditors evaluate and communicate control deficiencies identified during an audit. This course will be a comprehensive review of not only what you need to do, but how to do it, including specific examples and worksheets developed by the author. An in-depth understanding of the definitions of a control deficiency, significant deficiency, and material weakness is absolutely required in order to properly apply these standards. If you want to improve this area of your audit practice, this course is for you.

June 27, 2013

Thursday

Ridgeland

NEW

MSCPA Center

Private Company Financial Reporting**Discussion Leader:** Kurt Oestriecher, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**NEW****Course Hours:** 1:00-4:30**LEVEL:** Intermediate **CPE Credit:** 4 **A&A** **VENDOR:** Self-developed **ACRONYM:** PCFR4

COURSE OBJECTIVES AND DESCRIPTION: The United States in closer than ever in separating GAAP for public and private companies. The Private Company Council (PCC) of the FAF was formed in 2012 to research and suggest differential standards. The AICPA has prepared the Financial Reporting Framework for SME's, and will be adopted in 2013. This course will update participants on the status of these two projects, and highlight the differences that will be created for private companies in the United States.

June 28, 2013

Friday

Ridgeland

MSCPA Center

Audits of 401(k) Plans**Discussion Leader:** Bill Felder, CPA CISA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 9:00-5:00**LEVEL:** Basic **CPE Credit:** 8 **A&A** **VENDOR:** AICPA **ACRONYM:** AFKP-2**CPE REGISTRATION**

Due to space constraints, the previous course descriptions have been condensed. The full descriptions – as provided by the CPE vendors – are available through links on our web site: www.ms-cpa.org under EDUCATION. You may register through the members' portion of the web site or by mailing or faxing the registration portion below with your check or credit card number to: Mississippi Society of CPAs, 306 Southampton Row, Ridgeland, MS 39157. Fax: (601) 856-8255. Please check each course you wish to attend and circle each amount included to ensure we enter your payment correctly.

(√) DATE	COURSE TITLE	CITY	LOCATION	* AICPA	MEM\$	NON-MEM\$	CPE Hrs.	Rec'd Area
() Jun 3	Why You Need to Know Something About Fraud and Internal Controls	Ridgeland	MSCPA Center		140	180	4	A&A
() Jun 3	Fraud Happened . . . Now What?	Ridgeland	MSCPA Center		140	180	4	A&A
() Jun 4	Preparing OBOA Fin. Stmt: Cash, Modified Cash, & Tax Basis	Ridgeland	MSCPA Center		140	180	4	A&A
() Jun 4	Efficient Small Business Audits : Getting the Best Results for Your Client	Ridgeland	MSCPA Center		140	180	4	A&A
() Jun 5	Individual Tax Planning Ideas for 2013	Ridgeland	MSCPA Center		140	180	4	Tax
() Jun 5	Mastering Basis Issues for S Corporations, Partnerships, and LLCs	Ridgeland	MSCPA Center		140	180	4	Tax
() Jun 6	Partnerships and LLCs: Avoiding Common Pitfalls Facing Practitioners	Ridgeland	MSCPA Center		140	180	4	Tax
() Jun 6	Critical Tax Issues in Buying and Selling a Business	Ridgeland	MSCPA Center		140	180	4	Tax
() Jun 6	MAP CONFERENCE	Ridgeland	Embassy Suites		75	115	4	General
() Jun 7	Ethics, Rules & Regulations	Ridgeland	MSCPA Center		140	180	4	Ethics
() Jun 7	New Medicine--Key Issues ... the Patient Protection & Affordable Care Act	Ridgeland	MSCPA Center		140	180	4	Tax
() Jun 10	Compilation, Review, and Accounting Service Update	Ridgeland	Holmes Comm. Coll.		140	180	4	A&A
() Jun 10	Divorce Taxation	Ridgeland	MSCPA Center		140	180	4	Tax
() Jun 10	Advanced Compilation and Review Issues. . .	Ridgeland	Holmes Comm. Coll.		140	180	4	A&A
() Jun 10	Employment Law - A Primer for Accountants and Executives	Ridgeland	MSCPA Center		140	180	4	General
() Jun 11	Analyzing a Business and Its Financial Statements	Ridgeland	MSCPA Center		140	180	4	A&A
() Jun 11	Business Valuation - A Guide for the Non-Specialist	Ridgeland	MSCPA Center		140	180	4	General
() Jun 11	Excel Financial Reporting and Analysis	Ridgeland	Holmes Comm. Coll.		270	345	8	A&A
() Jun 12	Creating the Best Projections You Can: Insights and Techniques	Ridgeland	MSCPA Center		140	180	4	A&A
() Jun 12	Financial Analysis in a Metrics Driven World: "Run the Numbers Effectively"	Ridgeland	MSCPA Center		140	180	4	A&A
() Jun 12	QuickBooks Advanced Features, Tools, and Techniques	Ridgeland	Holmes Comm. Coll.		270	345	8	A&A-6; Gen.2
() Jun 13	The Mobile Office	Ridgeland	Holmes Comm. Coll.		270	345	8	General
() Jun 13	Corporate Finance Check-up: Renovate Your Analytical Toolbox	Ridgeland	MSCPA Center		255	330	8	General
() Jun 14	Financial Reporting: Turn Information Into Action!	Ridgeland	MSCPA Center		255	330	8	A&A

() Jun 17	How to Settle an Estate For a Client from A to Z	Ridgeland	MSCPA Center	255	330	8	Tax	
() Jun 17	Write-up, Payroll, and Other Accounting Services: Managing the Risks	Gulfport	Great Southern Club	140	180	4	A&A	
() Jun 17	iPad - An Effective Business Tool	Gulfport	Great Southern Club	140	180	4	General	
() Jun 17	Preparing OCBOA Fin. Stmt: Cash, Modified Cash, & Tax Basis	Gulfport	Great Southern Club	140	180	4	A&A	
() Jun 17	Excel Tables - Revolutionize How You Work With Excel	Gulfport	Great Southern Club	140	180	4	General	
() Jun 18	Technology Update	Gulfport	Great Southern Club	140	180	4	General	
() Jun 18	Ethics, Rules & Regulations	Gulfport	Great Southern Club	140	180	4	Ethics	
() Jun 18	PDF Forms - What Accountants Need to Know	Gulfport	Great Southern Club	140	180	4	General	
() Jun 18	Current Issues in Accounting and Auditing: An Annual Update	Gulfport	Great Southern Club	140	180	4	A&A	
() Jun 18	Fraud & Abuse in Not-for-Profit Entities & Governments	Ridgeland	MSCPA Center	255	330	8	A&A;YB	
() Jun 19	What Accountants Should Know About Fraud	Gulfport	Great Southern Club	140	180	4	A&A	
() Jun 19	Excel Best Practices	Gulfport	Great Southern Club	270	345	8	General	
() Jun 19	Accounting and Reporting for Not-for-Profits: Issues and Answers	Ridgeland	MSCPA Center	255	330	8	A&A;YB	
() Jun 20	Latest Developments in Government and Nonprofit Accounting & Auditing	Ridgeland	MSCPA Center	255	330	8	A&A;YB	
() Jun 21	OMB A-133 from A to Z	Ridgeland	MSCPA Center	255	330	8	A&A;YB	
() Jun 24	Excel Macros - Part 1	Ridgeland	Holmes Comm. Coll.	140	180	4	General	
() Jun 24	Technology Update	Ridgeland	Holmes Comm. Coll.	140	180	4	General	
() Jun 24	Shortcuts to Tax Cuts: Individual Tax, Social Security, and Retirement . . .	Ridgeland	MSCPA Center	255	330	8	Tax	
() Jun 25	iPad - An Effective Business Tool	Ridgeland	Holmes Comm. Coll.	140	180	4	General	
() Jun 25	PDF Forms - What Accountants Need to Know	Ridgeland	Holmes Comm. Coll.	140	180	4	General	
() Jun 25	Determining How Much Money You Need to Retire, and Tax Ideas . . .	Ridgeland	MSCPA Center	255	330	8	Tax	
() Jun 26	Performing Compilation and Review Engagements Under SSARS	Ridgeland	Holmes Comm. Coll.	255	330	8	A&A	
() Jun 26	MBA in a Day	Ridgeland	MSCPA Center	255	330	8	General	
() Jun 27	Ethics, Rules & Regulations	Ridgeland	Holmes Comm. Coll.	140	180	4	Ethics	
() Jun 27	Current Issues in Accounting and Auditing: An Annual Update	Ridgeland	Holmes Comm. Coll.	140	180	4	A&A	
() Jun 27	Identifying and Reporting Control Deficiencies	Ridgeland	MSCPA Center	140	180	4	A&A	
() Jun 27	Private Company Financial Reporting	Ridgeland	MSCPA Center	140	180	4	A&A	
() Jun 28	Audits of 401(k) Plans	Ridgeland	MSCPA Center	*	255	330	8	A&A

* AICPA Seminar. AICPA members may deduct \$30 per day from fee. See www.ms-cpa.org for the CPE Catalog with further details if necessary. The **member rate** for CPE programs is available to all members of the MSCPA. **Non-certified staff may also claim the member rate.**

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