

## New CPAs Honored by State Board at April 29 Ceremony



The Mississippi State Board of Public Accountancy recognized new CPAs during their Spring Ceremony Saturday, April 29 at the Capitol in Jackson. MSCPA Chairman Charles Prince introduced the new CPAs to the Society and Kimberly Williams, President of the MSCPA Young CPA Network, provided an overview of the Network and invited the new CPAs to become active. Keynote speaker was Colleen K. Conrad, CPA of the National Association of State Boards of Accountancy (NASBA). Angela Pannell, Chairman of the State Board, administered the Oath of Title. New CPAs recognized were Eddie Casey Bell, Mark Allen Case, Jacob Maurice Daniel, Phillip Junxiong Chu, Tracy Robertson Day, Monica M. Dean, Jonathan A. Dungan, Derek Michael Easley, Bradley S. Floore, James W. Henley, Jr., John Carpenter Ingram, Kylie Rowell Joiner, Vanessa F. Mitchell, Hong Banh Nguyen, Byron Claude Porter, Jr., Ty Michael Pulliam, Callian C. Robinson, Danielle Chaney Shelby, Seth Thomas Sutton, Landon Colby Weaver, Julia Ann Whitley, Jessica Whittington, and Nataliya P. Winters.

## Absentee Ballots Available for Officer Elections

The Nominations Committee submits candidates for election to fill each office and for the at-large Board of Directors position for 2017-2018. See pages 4-5 for photos and profiles on the candidates. Each member of the Society can vote at the Annual Meeting in person or by mail ballot prior to the Annual Meeting. The Annual Meeting will be held Saturday,

June 24, 2017 during the MSCPA Annual Convention at Sandestin Golf and Beach Resort in Destin, Florida. Members not attending the Annual Meeting may request an absentee ballot by mail (MSCPA, 306 Southampton Row, Ridgeland, MS 39157) or email (memberservices@ms-cpa.org). Absentee ballots must be received by the Society office by close of business June 20.

## IN MEMORIAM

JEFFERSON E. "JERRY" WILLIAMS  
Lena  
Died April 27, 2017



## MEMORIAL GIFT

to the  
EDUCATION FOUNDATION  
in memory of  
JEFFERSON E. "JERRY" WILLIAMS  
Lena  
By  
Steven T. Kean  
Brandon

## 2016 CPA Exam Medal Winners

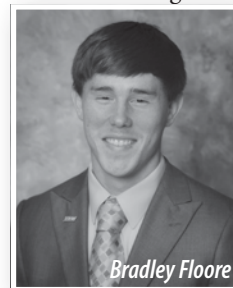
The MSCPA Awards, Education and Scholarships Committee has notified winners of Gold, Silver and Bronze medals from the 2016 CPA Exam.

These awards honor those who attained the highest scores in passing all parts of the exam taken for the first time in one sitting during 2016. Winners will be recognized during the MSCPA Annual Business Meeting on Saturday, June 24 at Sandestin Golf and Beach Resort.

### Medal winners from 2016 include:

- THE FRED T. NEELY GOLD MEDAL:  
**Bradley Floore**

Bradley was born in Ocean Springs and graduated from the University of Southern Mississippi with both a B.S.B.A. in accounting and B.S.B.A. in banking and finance in 2016. He was also awarded the 2015 MSCPA Hamp King Award. He worked as Staff Accountant at Wright CPA Group, PLLC in 2014, Supervision & Regulation Quality Assurance Intern at Federal Reserve Bank of Atlanta in 2015, and Assurance Intern for HORNE LLP in 2016. He is currently a Credit and Investments Financial Analyst for the Office of the State Treasurer in Atlanta, Georgia.





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Mississippi Society of  
Certified Public Accountants*

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## OFFICERS

**Chairman**  
Charles Prince  
MAGEE

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Bill Taylor  
WATER VALLEY

**Treasurer**  
Billy Morehead  
MADISON

**Secretary**  
Vera Reed  
LUCEDALE

**President/CEO**  
Karen Moody  
JACKSON

*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

## JOSEPH BOST

Topp McWhorter Harvey PLLC  
Hattiesburg

## JAMIE BRINSON

Topp McWhorter Harvey PLLC  
Hattiesburg

## JOHN R. CALVERT

HORNE LLP  
Madison

## WILLIAMS C. CARTER

Silas Simmons, LLP  
Natchez

## MARK A. CASE

Miller & White, Inc.  
Brookhaven

## JOHN C. CHAPOTON

HORNE LLP  
Gulfport

## RUTH H. CONDIT

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## JEREMY GRANT

Topp McWhorter Harvey PLLC  
Hattiesburg

## Laura D. Hubbard

Carr Riggs and Ingram LLC  
Clinton

## MORGAN LAMB

HORNE LLP  
Brandon

## CAROLINA LAVRIC

C Spire Wireless  
Madison

## JENNIFER S. LOTT

Merit Health Medical Group  
Madison

## MATTHEW G. METCALF

Haddox Reid Eubank Betts PLLC  
Madison

## HONG NGUYEN

Watkins, Ward and Stafford, PLLC  
Flowood

## DANIEL PAYNE

Alexander, Van Loon, Sloan, Levens &  
Favre, PLLC  
Ocean Springs

## LINDEN POTTS

Matthews, Cutrer & Lindsay, P.A.  
Jackson

## KURT SCHNEIDER

Haddox Reid Eubanks Betts PLLC  
Madison

## MASON S. SMITH

Topp McWhorter Harvey PLLC  
Hattiesburg

## MIKE B. SMITH

Medical Management Services  
Brandon

## ASHLEY SULLIVAN

Haddox Reid Eubank Betts PLLC  
Madison

## JOE W. TERRY IV

Young Wells Williams PA  
Canton

## STEPHANIE TURNER

Topp McWhorter Harvey PLLC  
Hattiesburg

## OLIVIA A. WILCOX

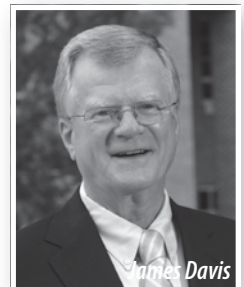
Topp McWhorter Harvey PLLC  
Picayune

## JESSICA J. WOODS

Mississippi State University  
Starkville

# Board Reappoints James W. Davis for Trustee

In accordance with the Trust Agreement of the Mississippi Society of Certified Public Accountants Education Foundation, the Trustees of the Foundation of which there are three, shall be appointed by vote of the Society and shall serve for a three-year term beginning July 1. The terms of the Trustees shall be staggered so that one new Trustee shall be appointed each year. For compliance with the Trust Agreement, the Board of Governors of the Mississippi Society of Certified Public Accountants has reappointed James W. Davis of Oxford. Other Trustees of the Foundation are Stacy E. Thomas of Jackson and J. Thomas Vickers of Ridgeland.

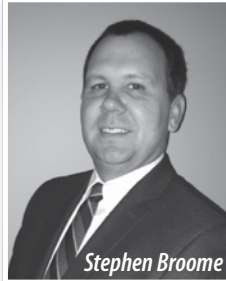


## MEDAL WINNERS

continued from page 1

• **THE T.E. LOTT SILVER MEDAL: Stephen Broome**

Stephen was born in Jackson and graduated from the University of Southern Mississippi with a B.S.B.A. in accounting and a Master of Professional Accountancy. While at the University of Southern Mississippi, Stephen was awarded the Federation of Schools of Accountancy Award and the BKD Award in Accounting. He currently works as an Auctioneer for several dealers-only automobile auctions and as an Accountant for Robert Donnell CPA in Hattiesburg.



Stephen Broome

• **THE SILAS M. SIMMONS BRONZE MEDAL: Carolyn Bright**

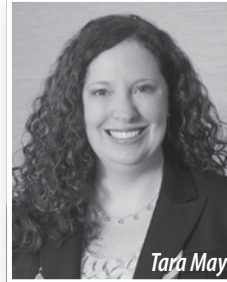
Carolyn was born in Memphis, Tenn. and graduated from the University of Mississippi with a Bachelor of Accountancy and a Master of Accountancy. She was previously Owner of Bright CPA Firm, PLLC and now works as an Accountant for IBR Payroll in Southaven.



Carolyn Bright

## Member News

HORNE LLP, one of the nation's top 50 accounting and business advisory firms, welcomes **Tara May, CPA, CPFA**, as a retirement plan advisor for HORNE Wealth Advisors. With her more than 20 years of experience in the retirement plan industry, May advises business owners and plan participants in meeting their individualized goals through company sponsored retirement plans. May also has experience in assisting plan sponsors, other trusted advisors and plan participants to navigate the ever-changing legislative landscape as well as serving as a representative for plan sponsors through IRS and DOL reviews, investigations and audits. May earned a Bachelor of Accountancy at the University of Mississippi and she is a Certified Public Accountant, a Qualified 401(k) Administrator and a Certified Plan Fiduciary Advisor.



Tara May

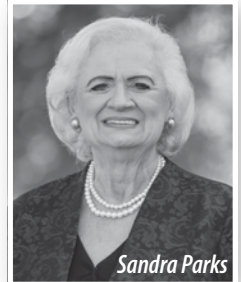
**Lauren B. Middleton, CPA/PFS**, was recently named as United Mississippi Bank Executive Vice President/Chief Financial Officer. Middleton joined UMB in 2013 as Vice President/Loan Review. Previously, she was employed by The Gillon Group, PLLC for seven years, reaching the level of Partner of the firm when she left to join UMB. As

a CPA and Personal Financial Specialist with five years of banking experience, Middleton brings a broad knowledge of finances to her responsibilities of financial planning and management of financial risks.



Lauren Middleton

Mississippi College School of Business announces the retirement of a longtime faculty member, **Dr. Sandra Parks, CPA**. Dr. Parks retires after more than four decades of service, having joined the accounting faculty in 1976. She has taught generations of accounting students and helped mold the careers of future CPAs both inside and outside the classroom. She has left a mark on the accounting profession in Mississippi and wherever her former students practice accounting. Dr. Parks was the 2008 recipient of the MSCPA Outstanding Educator Award and a longtime member of the Awards, Education and Scholarships Committee which she chaired. She was honored April 11 at the Mississippi College School of Business Awards Banquet.



Sandra Parks

### WATKINS, WARD AND STAFFORD PROFESSIONAL LIMITED LIABILITY COMPANY CERTIFIED PUBLIC ACCOUNTANTS

TAKES PLEASURE IN ANNOUNCING THE ADMITTANCE OF

**JERRY L. GAMMEL, CPA**  
**MICHAEL C. KNOX, CPA**  
**CLIFFORD P. STEWART, CPA**

AS MEMBERS OF THE FIRM  
ON MAY 1, 2017

WITH LOCATIONS IN

AMORY  
CALHOUN CITY  
COLUMBUS  
EUPORA

HOLLY SPRINGS  
HOUSTON  
JACKSON  
KOSCIUSKO

LOUISVILLE  
MACON  
OKOLONA  
OXFORD

PHILADELPHIA  
PONTOTOC  
STARKVILLE  
WEST POINT



## 2017-2018 Chairman Bill Taylor, Water Valley MEET THE CANDIDATES

The election is scheduled for Saturday, June 24, 2017 during the Annual Business Meeting at Sandestin Golf and Beach Resort in Destin, Florida. Absentee ballots for members who will be unable to attend the Business Meeting are available upon request.

Members of the Nominations Committee include: Cheryl Lee-Chairman, Jackson; Allison Garner, Oxford; Ed Jones, Pascagoula; Samantha Moore, Madison; and Sim Mosby, Natchez.

### Vice Chairman / Chairman-Elect



**ANNETTE HERRIN** is the partner in charge of the Consulting Services Division of Topp McWhorter, Harvey, PLLC. She has 25 years public accounting experience, 18 of which have been focused in the areas of business valuation and litigation support. Annette is Accredited in Business Valuation (ABV), a Certified Valuation Analyst (CVA), a Certified Fraud Examiner (CFE), Certified in Financial Forensics (CFF), and a Master Analyst in Financial Forensics (MAFF). She was named one of "Mississippi's 50 Leading Business

Women" in 2001 and "Top 40 Under 40" in 2008 by the *Mississippi Business Journal*. She serves as chairman of the Business Valuation and Litigation Support Committee of the MSCPA and is a member of the Certified in Financial Forensics Credential Committee of the AICPA. She has previously served as member of the Valuation Education and Credentialing Board of the National Association of Certified Valuators and Analysts and Past President of its Mississippi chapter. Annette has also served as Secretary of the MSCPA and on the University of Southern Mississippi Foundation Estate Planning Council (including member of the Executive Committee), the Finance Committee for the University of Southern Mississippi Alumni Association, and is a Past President of the Southeast Chapter of the MSCPA. She is a graduate of the University of Southern Mississippi with a Bachelor of Science in Business Administration and a Master of Business Administration. She is a member of the National Association of Forensic Economics, the American Academy of Economic and Financial Experts, and an associate member of the American Bar Association.



**VERA M. REED** is a franchise partner at HORNE LLP where she specializes in tax and consulting services concentrating in business operations, tax planning and consultation, and financial analyses. Vera oversees internal franchise staff operations ensuring seamless performance and exceptional client service for some of the highest performing franchise businesses in the country. Her passion stems from her commitment to help her clients achieve their goals and her team members realize their full potential.

Vera joined HORNE in 1991 and has over 26 years of comprehensive accounting experience in the franchise industry. She is a graduate of the University of South Alabama where she has served on the Gift Planning Council and the Accounting Advisory Board. Vera has been actively involved with the MSCPA throughout her career including serving on the Long Range Planning Committee and the current Secretary for the Board of Governors. Her professional affiliations include the MSCPA, Alabama Society of CPAs, and the AICPA.

Vera supports her community through various projects and serves as a tabulator for the Distinguished Young Woman program. She is an active member of Snow Road Missionary Baptist Church serving as a vocalist and pianist. Vera and her husband Albert of 26 years have one son, Corey, age 24.

### Treasurer



**KIMBERLY S. CASKEY** is a member of Watkins, Ward and Stafford, PLLC. She has more than twenty-five years of experience in public accounting. Kim's practice is concentrated in agriculture, healthcare, manufacturing, audit and management advisory services. Prior to public accounting, she spent 4 ½ years as a controller in manufacturing. She is currently a member of the AICPA and has been active as an officer and board member of the North Central Chapter of the MSCPA.

Her community involvement includes serving as a past Board Member of New Horizon's Credit Union; Past President, Vice President, Treasurer and Life Member of Junior Auxiliary of West Point; and Treasurer and Secretary of West Point Memorial Gardens, Inc. Kim earned a Bachelor of Science degree at Mississippi University for Women in 1986 and is an active member and a past Parish Council President of Immaculate Conception Catholic Church. She and her husband Paul have two sons, Joseph and Jonah and reside in West Point.



**JERRY GOOLSBY** is an assurance partner with BKD, LLP in Jackson where he leads BKD's Mississippi manufacturing and distribution practice. Jerry began his public accounting career in 1991 with Smith, Turner & Reeves, which merged with BKD in 2008. Prior to joining Smith, Turner & Reeves, Jerry served in the accounting department of BancorpSouth in Tupelo. He currently serves a wide spectrum of industries, including manufacturing, distribution, construction and telecommunications.

Jerry is a native of Falkner, Mississippi and a 1987 graduate of Mississippi State University, where he currently serves as Vice-Chair of the Advisory Council for the School of Accountancy.

Jerry is a long-time member of the MSCPA having served on the Board of Governors and President and Vice-President of Programs for the Central Chapter. He currently serves on the Legislative Committee and chairs the Long-Range Planning Committee.

Jerry has served as Chairman of the Metropolitan Jackson YMCA and Treasurer of Friends of Children's Hospital at the University of Mississippi Medical Center and is a graduate of both Leadership Rankin and Mississippi Economic Council's Leadership Mississippi.

Jerry is a member of Colonial Heights Baptist Church in Ridgeland where he has served as Chairman of the Deacons and Finance Committee and currently teaches a young couples class.

Jerry and his wife Vicky have two grown sons and currently live in Canton.

## Secretary



**ANNETTE K. BRIDGEN** has been an assistant professor since 2013 at Jackson State University where she teaches Governmental Accounting and Auditing at both the undergraduate and graduate levels. She earned her Ph.D. in accounting from The University of Mississippi in 2008 and served on that faculty as an assistant professor until 2013. She holds undergraduate and graduate degrees in accounting from Jackson State University.

In July 2015, Annette was honored by receiving the Association of Government Accountants' Cornelius E. Tierney/Ernst & Young Research Award for her research in governmental accounting. She has received numerous

other awards including the Faculty Excellence Award for the College of Business Department of Accounting at Jackson State University, the outstanding dissertation award from the Government and Nonprofit Section of the American Accounting Association, the Graduate Achievement Award for Ph.D. Degree in Accountancy, and the Doctoral Teaching Award from the E. H. Patterson School of Accountancy at The University of Mississippi.

In 2013, she was selected as a member of the Government Accountability Office's (GAO) Green Book Advisory Council to update the standards for internal control of the United States government. In 2016, she was also asked to serve on the GAO Yellow Book Advisory Council to update the government auditing standards.

Annette has been a member of the MSCPA since 1993, a member of the Awards, Education and Scholarship Committee (AES) since 2003, and chair of the AES Committee since 2014. She is a certified government financial manager and a certified internal control auditor. She has over 15 years of combined experience in auditing with the Mississippi State Auditor's Office, the Mississippi Department of Human Services, and the Mississippi Secretary of State's Office. She is a member several professional organizations, including the American Institute of Certified Public Accountants and the Association of Government Accountants.



**ALLISON WILSON** is a shareholder in Metro Mechanical, Inc., a mechanical contractor in Mississippi and Louisiana. Allison gained valuable experience working with a regional public accounting firm in the areas of telecommunications, manufacturing, and healthcare. She made the transition to private industry becoming the controller of Metro Mechanical in 2010. Allison graduated Summa Cum Laude from Mississippi State University in 2007 while completing

two internships during her undergraduate work. The following year she also earned her Master of Professional Accountancy from MSU. Upon graduation, she quickly became involved with the MSCPA's Young CPA Network serving on one of the first Board of Directors. She served as Secretary, Vice President, and President of the Network. During her term on the Network's Board, she also began work on the MSCPA Industry Committee as Chairman where she has served since 2014.

At Morrison Heights Baptist Church, Allison serves as a director of the 1st grade choir, a committee member of the Childcare Development Center, and as the event leader of her life group. Her accomplishments include the Silas M. Simmons Bronze Medal Award for the 2009 CPA exam and becoming a graduate of the Mississippi Association of Builders and Contractors Construction Leadership Institute. She is affiliated with the AICPA, MSCPA, MSABC, ABC Bayou Chapter, and the Clinton Chamber of Commerce. She has also served on the MSCPA Board of Governors. Allison and her husband Drew live in Raymond with their daughter.

## At-Large Board Member



**LEE ADAMS** serves as Vice President of Internal Audit for Ergon, Inc. in Flowood. Lee began his career in the Jackson office of Arthur Andersen and later joined the staff of Haddox Reid Eubank Betts PLLC where he was admitted as a member in 2003. Lee earned his degree in accounting from Mississippi State University and currently serves on the Advisory Council for the University's Adkerson School of Accountancy.

Lee currently serves on the MSCPA's Long Range Planning and Accounting and Auditing committees. He served as the 2012-13 Chairman of the MSCPA and

its Board of Governors. Lee has also chaired the MSCPA's Long Range Planning, Accounting and Auditing, Nominating, and Public Service Award committees, and served as a member of the Building Committee. In addition, he is Past-President of the Petroleum Accounting Society of Mississippi. Lee has also served as a national council representative for Mississippi with both the AICPA and the Council of Petroleum Accounting Societies.

Lee and his daughter, Hannah, reside in the Flowood area and are active members of Colonial Heights Baptist Church where he serves as a high school lifegroup teacher. He is also past chair of the Church's deacons, Finance Committee, and Personnel Committee. In addition, Lee serves on the Board of Trustees and Executive Committee of Hartfield Academy in Flowood.



**CLYDE E. HERRING** graduated from Mississippi State University with a BPA and MPA in 1980 and 1981, respectively, and the University of Alabama with a PhD in 1988. He was on the faculty at Mississippi State University from 1987-2010, when he retired from MSU and moved to Jefferson City, TN, working for Carson-Newman University. He served as Dean of the School of Business, MBA Director, and faculty member from 2010-2016. He returned to Mississippi State University full time in fall 2016 where he serves as a Clinical Associate Professor, with primary responsibilities in teaching and

service. He has been active in several professional organizations during his tenure at MSU, including the MSCPA, where he has served as (1) member and chairman of the Awards, Education, and Scholarship Committee, (2) member and chairman of the Educator's Symposium Subcommittee, (3) Treasurer for the 1991-1992 year, (4) Vice-Chairman/Chairman/Past Chairman from 2003-2006, and (5) at-large Board member. He currently serves on the Long Range Planning Committee. Clyde was selected as the MSCPA Outstanding Educator for Mississippi in 2001. Clyde and his wife, Tammye, have two children; Christopher, (wife—Danley) who will be an optometrist in Starkville starting July 1, 2016, and Jordan, who will work with Horne CPA Group in Memphis in their Horne Cyber division beginning May 2016.

## Education Foundation Trustee



**DR. JAMES W. DAVIS** is a professor in the Patterson School of Accountancy and holds the distinguished Peery Chair in Accountancy. He served as dean of the school from 1993 until 2002, and has been a member of the accountancy faculty since 1965. Dr. Davis is a native of Panola County, Mississippi, and attended public schools at Pleasant Grove and Sardis. He holds bachelor's, master's, and doctoral degrees from Ole Miss, all with majors in accountancy.

He has experience in industry and in the Houston office of Arthur Andersen. He served as president of the MSCPA in 1983-1984. Previously he had served as the Society's secretary, chair of several committees and as a

member of the Board of Governors.

As the unofficial historian for the Society, he authored a history of accountancy in Mississippi in 1977, based upon his doctoral dissertation.

Dr. Davis received the University-wide Outstanding Teacher Award in 1985 and received the Patterson School's outstanding teacher awards in 1983, 1988, 1993, 2004 and 2008. He received the Mississippi Society's Outstanding Educator Award in 1993.

He is a Trustee of the Mississippi Society's Educational Foundation. He holds memberships in Omicron Delta Kappa, Phi Kappa Phi, Beta Gamma Sigma, and Beta Alpha Psi. He is a member of St. Peter's Episcopal Church in Oxford. Dr. Davis enjoys travel, reading, and collecting books and has a complete collection of Ole Miss Annuals.

# Mississippi Society of Certified Public Accountants

INCORPORATED UNDER THE LAWS OF THE STATE OF MISSISSIPPI

## NOTICE OF ANNUAL MEETING

Under the provisions of Section 4 of the Mississippi Society of CPAs' bylaws, notice is hereby given of the annual business meeting. It will be held at the Annual Convention at Sandestin Golf and Beach Resort in Destin, Florida on June 24, 2017 at nine o'clock. The election of officers, reports from officers, and other business will be conducted at this time.

## *Retire Now – Not Later!*

Do you have a successful accounting practice? Are you ready to sell your firm? Retire? We are interested in discussing options with you.

Contact Charles Lindsay at Matthews, Cutrer & Lindsay, P.A.  
at 601-898-8875 or email [clindsay@mclcpa.net](mailto:clindsay@mclcpa.net).



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# MSCPA Bylaws Amendment

The MSCPA Board of Governors has approved the following amendment to the Bylaws to be effective July 1, 2017, and the change requires approval of the Society's members at the Annual Meeting. In order to clarify the requirements for lifetime membership and to ensure that the Society's dues structure allows the Society to continue to serve its members now and in the future, the Bylaws change is needed.

## The proposed amendment to Article II, Section 1(c) is as follows:

"A lifetime membership shall be granted to a member meeting all of the following qualifications: (i) the individual has been a member of the Society for forty (40) or more consecutive years; and (ii) the individual has reached full retirement age as defined by the Social Security Administration; and (iii) the individual is retired, earning no fee from public practice or industry; and (iv) the individual makes application to the Society for recognition of this status. Application for lifetime membership shall be made at least one (1) year in advance of recognition of status. Lifetime members shall be exempt from paying dues, beginning with the next fiscal year of the Society after having been recognized as a lifetime member. Additionally, lifetime members may hold elected office and retain full voting rights with the Society."

## The current wording of Article II, Section 1(c) is as follows:

"A life membership shall be granted to a member who has reached the age of 65 years (or upon substantial retirement from his/her full-time occupation), and who has been a member of the Society for a minimum of twenty-five (25) years. Members must notify the Society that the requirements of this classification have been met. Life members shall be exempt from paying dues (beginning with the next fiscal year of the Society after having been granted life membership), may hold elected office and retain full voting rights."



## TOPP McWHORTER HARVEY PLLC

CERTIFIED PUBLIC ACCOUNTANTS

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Columbia - Hattiesburg - Gulfport

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- Marital Dissolution
- ESOPs
- Buy/Sell Agreements
- Shareholder Disputes
- Stock Options
- Charitable Contributions
- Sale, Merger, or Acquisitions



**Annette P. Herrin,**  
CPA/ABV, CVA, CFE, CFF



**William T. Kelly,**  
CPA/ABV, CVA

**Litigation Support**

- Lost Profits
- Forensic Accounting
- Business Interruption
- Personal Injury
- Wrongful Death
- Expert Witness Testimony
- Economic Damages
- Data Analysis
- Breach of Contract



**Leslie C. Bilancia**  
CPA, CVA



**Deena C. Keasler,**  
CPA/ABV, CVA



**Joe C. Travis,**  
CPA, CFF, CRFAC

**Information Technology**

- E-Discovery
- Digital Forensics
- Intellectual Property
- Family Law
- Employment Law
- Criminal Law
- Evidence Extraction

# REGISTER NOW for the MSCPA 2017 Annual Convention

Join other MSCPA members in Destin, June 22-25!

MSCPA's Annual Convention is the avenue to promote fellowship among the members. The Officers and Board of Governors welcome members, their families and guests and invite you to enjoy a program planned with entertainment for the whole family. To our new members, we especially invite you to join us and be a part of the convention.

## Who Should Attend?

- Accounting professionals and educators in all stages of their careers
- MSCPA members seeking to capitalize on purposeful networking
- Beach lovers interested in education and memorable experiences

## General registration includes:

- Welcome reception with hors d'oeuvres and cocktails
- Friday, Saturday and Sunday breakfast
- Two speaker presentations approved for 2 CPE credits
- Friday box lunch
- Saturday beach party/volleyball tournament
- Saturday reception
- Saturday dinner banquet
- Special entertainment

Following the Friday morning presentations, members may choose to participate in the golf tournament on the Baytowne Course or aboard the Destiny for an afternoon of fishing. The tennis tournament is also back on the agenda this year. Get your activity registrations in! Spouses, guests and children are welcome.

We are also looking for players and teams of six or more people to go head-to-head and claim the Bailey Trophy and title as champions of the 3rd annual MSCPA volleyball tournament. The volleyball tournament and beach party is a free activity. Gather up your co-workers, colleagues, family or friends and email [kmoody@ms-cpa.org](mailto:kmoody@ms-cpa.org) to sign up to play or just let us know you want to play and we will add you to a team.

Visit [ms-cpa.org/education/annual-convention](http://ms-cpa.org/education/annual-convention) to download the brochure for a detailed agenda and for more information about our speakers and special entertainment. You can register online or download a printable registration form to register by fax or mail.





# MSCPA Recognizes Outstanding Senior Accounting Majors

In the spring of each year the MSCPA recognizes seniors majoring in accounting from colleges and universities in Mississippi. Awards are presented at on-campus events (such as an award banquet, honors day or baccalaureate service). The 2017 recipients are:

***Alcorn State University***

DENIKA T. BOLDEN

***Belhaven University***

JAMES WALKER MARTIN

***Delta State University***

SHELBY BARRETT

***Jackson State University***

ANDRA I. LEWIS

***Millsaps College***

ANNIE YOUNG

***Mississippi College***

HANNAH ALLEN HOFFMAN

***Mississippi State University***

KENNETH DANIEL GARRAWAY

***Mississippi University for Women***

RAGAN E. JEFFREYS

***Mississippi Valley State University***

LEXIUS SCOTT

***University of Mississippi***

WARREN NOBLE BALL

***University of Southern Mississippi***

NINA BELLIPANNI

***William Carey University***

EMILY HARVELL



*From left to right: Dr. Billy Morehead, MSCPA Treasurer and Mississippi College Associate Professor of Accountancy; Hannah Hoffman, MSCPA Outstanding Senior Accounting Major from Mississippi College; and Karen Moody, MSCPA President/CEO. Hannah was honored at the Mississippi College School of Business Awards Banquet on April 11.*

## New Features for MSCPA's New Website: [www.ms-cpa.org](http://www.ms-cpa.org)

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

### Some Quick Notices

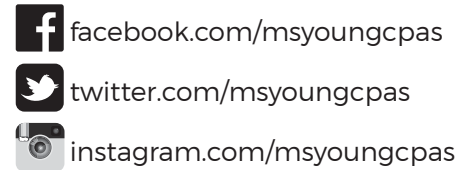
- MSCPA members with an e-mail can recover their account using the "forgot password" tool.
- Review your information on the Update Your Profile page and include your Fields of Interest and Areas of Expertise so MSCPA can better serve you. Here you can also upload a picture for your profile, opt in to have your information included the Find a CPA directory as well as volunteer for a committee.
- Firm admins will be able to manage your firm on the My Firm page by adding new firm members and editing existing ones or creating additional branches for your growing firm. Firm admins will also be able to print or pay your firm employees dues. Contact Jennie Truhett, [jtruhett@ms-cpa.org](mailto:jtruhett@ms-cpa.org) to be added as a firm admin.

### New Features

- Our new online CPE Catalog has more advanced search features and now includes online courses from the best providers in the country at a reduced cost for our members. All registrations will be included on your annual CPE transcript from us.
- Our new My CPE tool allows members to track existing and upcoming CPE registrations with ease as well as download course certificates, add courses not taken through the MSCPA, and print a course transcript.
- When registering for a course, members can optionally select to receive printed materials in addition to electronic materials at no additional charge. All registrants will be able to access e-materials prior to the courses they have registered for. We will only print materials for those that have selected to receive printed materials upon registering.

Thanks again for your continued support and patience as we move through this transition.





## YCPA Social

The MSCPA Young CPA Network hosted a social at Papitos Mexican Grill in Madison on April 27.

## MSCPA Young CPA Network Incoming At-Large Board Members for 2017

MSCPA Young CPA Network held their Annual Business Meeting April 28 and elected three at-large board members who each will serve a 2-year commitment beginning July 1, 2017. MSCPA Young CPA Network Officers and Committee Chairmen for 2017-2018 will be elected in the coming months.

- Shannon Adams, *Matthews, Cutrer & Lindsay, P.A.*
- Katelyn Gottberg, *BKD, LLP*
- Jack Kaler, *GranthamPoole CPAs*

## Adams Graduates from the Alabama Society of CPAs Leadership Academy



Shannon Adams

Shannon Adams was selected by the MSCPA to participate in the ASCPA Leadership Academy for emerging professionals. Training was led by The Rainmaker Academy of Nashville and consisted of four one-day sessions, webinars, required reading, coaching calls and projects over the course of a year. The Graduation and Awards Ceremony for Class VI was Thursday, May 4. Shannon has been in public accounting since January 2007 and currently works as an Audit Manager for Matthews, Cutrer and Lindsay, P.A. in Ridgeland.

## Young CPA Conference



MSCPA officially kicked off "CPE season" Friday, April 28 with our Young CPA Conference, sponsored by Community Bank, MEA Medical Clinics, and Southern AgCredit with Paychex exhibiting. Attendees heard from speakers Mark Lehman, John Higgins, Daniel Champney and Kip Bowen. 2016-2017 Young CPA Network Board of Directors from left to right: Allison Garner, Vice President-President Elect; Traci Forrest, At-Large Board Member; Alex Boyd, At-Large Board Member; Kimberly Williams, President; Peyton Cavin, At-Large Board Member; Lydia Windham, At-Large Board Member; Shannon Adams, ASCPA Leadership Academy Board Liaison; and Ed Maxwell, At-Large Board Member. Not pictured: Rob King, Secretary; and Ryan Wingfield, Immediate Past President.



# CPA License Presentation Ceremony



*Kimberly Williams, President of the MSCPA Young CPA Network, provided an overview of the Network and invited the new CPAs to become active.*



*New CPAs take the Oath of Title.*



*Phillip Junxiong Chu, Accountant/Auditor Professional 2 with the Mississippi Department of Transportation in Jackson, receives his CPA license from Angela Pannell, Chairman of the State Board.*



*Kylie Rowell Joiner, Senior Staff Auditor with Alexander, Van Loon, Sloan, Levens & Favre, PLLC in Gulfport, receives her CPA license from Angela Pannell, Chairman of the State Board.*

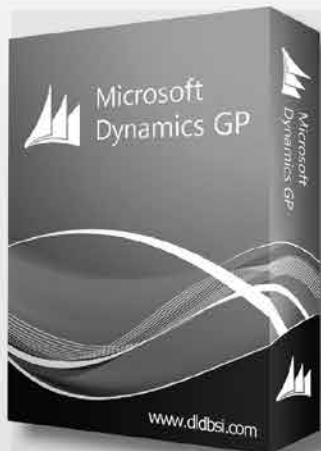


*From left to right: Kenny Dungan of Watkins, Ward and Stafford, PLLC; Jonathan A. Dungan of Watkins, Ward and Stafford, PLLC (son of Kenny Dungan); John Carpenter Ingram of GranthamPoole (son of Donna Ingram); and Donna Ingram of Donna M. Ingram, CPA.*



*From left to right: Kimberly Williams, MSCPA Young CPA Network President; Charles Prince, Chairman of the MSCPA; Colleen Conrad, NASBA Executive Vice President and keynote speaker; and Karen Moody, MSCPA President/CEO.*





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# Chapter Events

## CENTRAL CHAPTER



The MSCPA Central Chapter held their quarterly luncheon April 27 at the MSCPA Training Center in Ridgeland with 75 in attendance. CPE speaker was Dr. Kimberly Burke, Dean of the Else School of Management and Professor of Accounting at Millsaps College. From left to right: Dr. Kimberly Burke, Millsaps College; Julia Jesuit, Central Chapter Vice President-Programs; and Ginger Gorman, Central Chapter Secretary.



New Central Chapter officers for 2017-2018 were elected. From left to right: Julia Jesuit, President; Ginger Gorman, Vice President/Membership; Wil Crawford, Board of Governors Representative; Melanie Hamel, Board of Governors Representative; and Domina Kaler, Treasurer. Not pictured: Chelsey Henley, Vice-President/Programs; Blair Jussely, Secretary; and Kevin Jackson, Board of Governors Representative.

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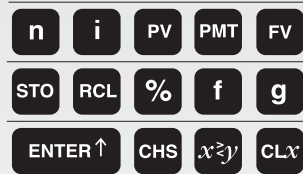
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# CPE THROUGH JUNE

**5/22/2017**

Monday-Tuesday  
Ridgeland  
Embassy Suites

**Mississippi Technology Conference**

**Discussion Leader:** Panel

**Cost: Members:** \$455 **Non-Members:** \$595 **AICPA Member Discount:** \$0

**Course Hours:** 8:00-4:30

**Level:** Update **CPE Credit:** 16 General **VENDOR:** K2 Enterprises **ACRONYM:** MTC

Course objectives and description: This two-day event attracts public, industry, and technology focused individuals seeking best practices in technology. Be impressed by the best tools, software, and resources to help you succeed. This year K2 Enterprises brings a variety of new sessions.

**5/23/2017**

Tuesday  
Hattiesburg  
Lake Terrace Conv. Ctr.

**Form 990: Mastering Its Unique Characteristics**

**Discussion Leader:** Brian Yacker

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

**Course Hours:** 8:30-4:30

**Level:** Basic **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** EO-F990

Course objectives and description: Explore the tax information and inherent not-for-profit organization issues to be mastered in properly preparing the current Form 990. This course covers the numerous reporting demands the 990 imposes, including how to respond to the Form's demands for narrative answers. Participants will gain an understanding of the tax and practical points essential to appropriate completion of the Form 990 and be guided on advising exempt clients on the Form's complexities and diverse demands.

**5/23/2017**

Tuesday  
Hattiesburg  
Lake Terrace Conv. Ctr.

**Fraud Update: Detecting and Preventing the Top Ten Fraud Schemes**

**Discussion Leader:** Thomas Newell

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

**Course Hours:** 8:30-4:30

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

Course objectives and description: Many costly fraudulent schemes have occurred repeatedly throughout the past several decades. Why do these material and frequently recurring frauds succeed? One reason is that business owners, management, auditors, and employees fail to recognize the red flags that have been associated with these financial statement and misappropriation of asset frauds. Another major reason is that the reporting and transaction processing systems do not have adequate controls to either prevent and/or detect these schemes. This course will provide descriptions of how these major frauds are perpetrated (including real-world examples) and the types of cost-effective controls that can be implemented by both small and large businesses and nonprofit entities to identify and prevent these deceptive acts.

**5/24/2017**

Wednesday  
Ridgeland  
MSCPA Center

**Audit Work papers: Documenting and Reviewing Field Work**

**Discussion Leader:** Glenn Helms

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

**Course Hours:** 8:30-4:30

**Level:** Basic **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** AUDW

Course objectives and description: Working papers are the building blocks of an audit. If it's not in the working papers, audit quality may suffer, as the manager and partner might not know about it or its ramifications may not be fully considered. Understand the professional standards regarding working paper documentation. Make this course part of the firm's quality control system. Learn the fundamentals of working paper preparation – form and content – to make sure audit considerations, work performed, and conclusions reached are properly documented. You will also explore examples which show field work supervisors what factors to consider and what steps to follow when reviewing working papers. In addition, typical working paper deficiencies are explained to help minimize potential liability.

**5/24/2017**

Wednesday  
Hattiesburg  
Lake Terrace Conv. Ctr.

**Internal Control Best Practices for Small- and Medium-Sized Entities**

**Discussion Leader:** Thomas Newell

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

**Course Hours:** 8:30-4:30

**Level:** Basic **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** ICSM

Course objectives and description: This course provides practical guidance for those involved with internal control responsibilities (auditing, monitoring, implementing, etc.) in adapting the updated COSO Internal Control Framework to small and medium-sized entities. Internal control concepts are applicable to every entity, regardless of size. However, there is no "one size fits all" set of rules that can be applied to all entities. Often times the internal control "best practices" that have evolved over time are based upon large entity environments and these "best practices" are not necessarily relevant to small and medium-sized entities. This course will show you some best practices for designing, implementing, monitoring, evaluating, and auditing cost-effective internal controls for small and medium-sized entities.

**5/24/2017**

Wednesday  
Hattiesburg  
Lake Terrace Conv. Ctr.

**Not-for-Profit Financial Reporting: Mastering the Unique Requirements**

**Discussion Leader:** Brian Yacker

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

**Course Hours:** 8:30-4:30

**Level:** Intermediate **CPE Credit:** 8 A&A/YB **VENDOR:** AICPA **ACRONYM:** NFPF-1

Course objectives and description: Do you know what makes not-for-profit accounting and financial reporting different? Are you aware of how not-for-profit financial statements will change as a result of the FASB's Financial Statement Project? Through a combination of practical guidance and case studies, this course will provide insight into what makes not-for-profits different while training you to clear key hurdles in not-for-profit accounting and reporting in an efficient and effective manner. Avoid the potholes of confusion and provide a financial picture that end users can truly understand.

**5/25/2017**

Thursday  
Hattiesburg  
Lake Terrace Conv. Ctr.

**Reviewing Pass-Through Tax Returns: What Are You Missing?**

**Discussion Leader:** William Murphy

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

**Course Hours:** 8:30-4:30

**Level:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** RPTR-1



Course objectives and description: Join us as we discuss the common errors practitioners make on pass through tax returns that are often missed by review staff. The intent is to sharpen skills for reviewers by examining case studies and discussing issues where additional information from the client may be warranted and areas of tax law where proper treatment requires additional analysis and information. Multiple issues will be discussed and both partnership and S corporation returns will be covered. This course follows a highly illustrative case study format to increase participant comprehension and retention.

**5/25/2017 Interpreting the New Revenue Recognition Standard: What All CPA's Need to Know**

Thursday  
Hattiesburg  
Lake Terrace Conv. Ctr.

**Discussion Leader:** Thomas Newell

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

**Course Hours:** 8:30-12

**Level:** Intermediate **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4INRR-1

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

**5/25/2017 Fraud in Small-to Medium-Sized Entities**

Thursday

Hattiesburg

Lake Terrace Conv. Ctr.

**Discussion Leader:** Thomas Newell

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

**Course Hours:** 1:00-4:30

**Level:** Basic **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4FSME

Course objectives and description: Due to the limited number of qualified professionals, many small to medium sized entities struggle with maintaining an adequate internal control structure. In addition, many auditors struggle with assisting their clients during the audit process while maintaining their independence and professional skepticism. This course includes an overview of the auditor's responsibilities related to financial statement fraud, and also includes information relevant to management's responsibility for fraud and internal controls.

**5/25/2017 Internal Controls and Risk Assessment: Key Factors in a Successful Audit**

Thursday

Ridgeland

MSCPA Center

**Discussion Leader:** Glenn Helms

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

**Course Hours:** 8:30-4:30

**Level:** Basic **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** ICRA

Course objectives and description: Under generally accepted auditing standards (GAAS), all auditors are required to follow a risk-based approach to auditing. The consideration of internal control is key to risk assessment and to the determination of the overall audit approach. Understand the requirements in a financial statement audit for understanding internal control and assessing the design and implementation thereof. The focus of this course is to help you get it right! Throughout the course we'll enhance your understanding with exercises designed to illustrate how the concepts apply to practical audit situations.

**5/26/2017 Purchasing, Inventory, and Cash Disbursements: Common Frauds and Internal Controls**

Friday

Ridgeland

MSCPA Center

**Discussion Leader:** Glenn Helms

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

**Course Hours:** 8:30-12

**Level:** Basic **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4PCD

Course objectives and description: Purchasing and cash disbursements are common targets for fraud in any entity's environment. While business owners and managers are aware that internal controls seem to be very important, they often don't know whether the entity's system is adequate. While accountants instinctively know that internal controls are important and necessary, it is sometimes difficult to effectively communicate this with business owners. It is important to focus on common frauds and internal controls over the purchasing and cash disbursement processes. This course teaches you to hone in on smaller businesses and not-for-profit entities where cost/benefit analysis is extremely important and fraud is more likely to occur. Learn how to efficiently analyze controls to ensure you're getting the "biggest bang for your buck" when considering a control to implement and/or test.

**5/26/2017 Fraud and Cash Receipts: Common Frauds and Internal Controls**

Friday

Ridgeland

MSCPA Center

**Discussion Leader:** Glenn Helms

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

**Course Hours:** 1:00-4:30

**Level:** Basic **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4RCR

Course objectives and description: Revenue and cash receipts are two critical areas that require strong controls to prevent intentional fraud or unintentional misstatements. While there is well-publicized fraud in these areas in larger companies, it also occurs in smaller businesses and not-for-profit entities. A sound system of internal controls is needed to help prevent fraud. All too often, a "one-size-fits-all" system is put in place without considering the uniqueness of each entity. It is crucial that an internal control system is tailored so that the areas of greatest risk receive the most attention.

**5/30/2017 Audits of 401(k) Plans**

Tuesday

Ridgeland

MSCPA Center

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

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

**Course Hours:** 8:30-4:30

**Level:** Basic **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** AFKP

Course objectives and description: Since 401(k) plans make a popular option for employee benefit plans, auditors of employee benefit plans must have the proper skills to audit these plans effectively. You will work through how to audit a 401(k) plan and prepare financial statements that satisfy ERISA and SEC requirements. Tap into ways to plan and conduct 401(k) audits more efficiently and effectively, and understand the differences between 401(k) audits and other employee benefit plan audits.

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**5/31/2017 Tax Considerations and Consequences for Closely Held Businesses**

Wednesday

Ridgeland

MSCPA Center

**Discussion Leader:** William F. (Bill) Taylor, CPA**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30**Course Hours:** 8:30-4:30**Level:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** CHTX

Course objectives and description: Provide insightful recommendations for the challenges faced by your closely held business clients. Employ smart business decisions that will minimize the tax burden, not only on the business, but also on the owners. The concepts are uniquely laid out in the course to allow you to easily and quickly identify those tax-saving strategies that fit your client's situation.

**5/31/2017 Nexus Update: Latest Developments in State Income, Franchise, and Sales Taxes**

Wednesday

Ridgeland

Holmes CC

**Discussion Leader:** Michael Frost**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30**Course Hours:** 8:30-4:30**Level:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** NXUP-1

Course objectives and description: The barriers to doing business across state lines have significantly decreased in recent years. However, this creates additional issues for taxpayers and their preparers in determining where and when they have nexus in a state which would require them to file either state income tax or sales tax returns. This class will not only help equip you in learning the various ways that states define and enforce nexus but also in how to determine when your company or client has nexus in a state, thus requiring the filing of tax returns.

**6/1/2017 Basis/Distributions for Pass-Through Entities: Simplifying the Complexities**

Thursday

Ridgeland

Holmes CC

**Discussion Leader:** Michael Frost**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30**Course Hours:** 8:30-4:30**Level:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** BADI

Course objectives and description: The IRS is scrutinizing, more closely than ever, the basis owners have and the transactions for which the computation of basis is required. This course addresses the rules used to determine basis for partnerships and S Corporations, and puts the computation of basis in contexts that often come under scrutiny – loss limitations, distributions, and sales of an interest, among others. Learn the crucial rules for computing the adjusted basis and the tax treatment of distributions from pass-through entities, such as partnerships and S Corporations. Focus on the computation of the basis and the at-risk amount for these entities. Become familiar with correct allocation of liabilities among partners, the types and amounts of income that can result from distributions and sales of interests, and the basis of assets distributed from pass-through entities.

**6/1/2017 AICPA's Annual Update: Top 12 Governmental and Not-for-Profit Accounting and Auditing Issues Facing CPAs**

Thursday

Ridgeland

MSCPA Center

**Discussion Leader:** John Georger, Jr.**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30**Course Hours:** 8:30-4:30**Level:** Update **CPE Credit:** 8 A&A/YB **VENDOR:** AICPA **ACRONYM:** TGNP

Course objectives and description: Preparers of governmental and nonprofit financial statements and their auditors often seek advice from the AICPA's Technical Hotline as well as from the GASB Technical Inquiry System. The advice they receive from these sources is high-quality and non-authoritative, but offers viable solutions or reasonable alternatives for accounting and auditing issues related to governmental and nonprofit organizations. The objective of this course is to enhance participants' knowledge and application of professional judgment by providing a review of the top accounting and auditing issues faced by preparers of governmental and not-for-profit financial statements and their auditors based on calls and inquiries received by both the AICPA and GASB over the past year.

**6/2/2017 Advanced Topics in a Single Audit**

Friday

Ridgeland

MSCPA Center

**Discussion Leader:** John Georger, Jr.**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30**Course Hours:** 8:30-4:30**Level:** Advanced **CPE Credit:** 8 A&A/YB **VENDOR:** AICPA **ACRONYM:** ADUG

Course objectives and description: Updated for OMB Uniform Guidance. Be prepared for difficult single audit areas before they happen rather than reviewing them after the fact. Learn how to carry the weighty responsibilities of planning, directing, and reporting on a single audit engagement conducted under the Uniform Guidance, with an emphasis on the advanced topics that require particular attention. This course gives you insights into key issues that are not covered in other courses, and provides case studies to help put the guidance into practice.

**6/5/2017 Fraud Risk in Governmental and Not-for-Profit Organizations**

Monday

Ridgeland

MSCPA Center

**Discussion Leader:** Dan Bradley**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0**Course Hours:** 8:30-12**Level:** Intermediate **CPE Credit:** 4 A&A/YB **VENDOR:** AICPA **ACRONYM:** CL4FRGNP

Course objectives and description: Recognizing fraud risks in governmental and not-for-profit organizations is often challenging due to the inherent nature of these organizations. In addition to their public nature, these organizations may have limited support staff or staff with limited accounting expertise which can result in less than effective fraud prevention and detection programs and/or increased opportunities for fraud. Using a combination of examples and explanations of audit standards, obtain an understanding of the frauds most commonly perpetrated in government and not-for-profit organizations and what prevention and detection procedures are effective in responding to these fraud risks. This course also discusses how auditors might address their responsibilities with respect to fraud in a financial statement audit of governmental and not-for-profit organizations.

**6/5/2017 Governmental Pensions: Prepare for a Changing Landscape**

Monday

Ridgeland

MSCPA Center

**Discussion Leader:** Dan Bradley**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0**Course Hours:** 1:00-4:30**Level:** Intermediate **CPE Credit:** 4 A&A/YB **VENDOR:** AICPA **ACRONYM:** CL4PENS

Course objectives and description: GASB Statement No. 68 changed the playing field for government organizations. Learn about the landmark pension accounting changes and how they change the accounting and financial reporting of pension benefits. Explore all the GASB statements that make



up the governmental pension reporting framework, including GASB Statement Nos. 67, 68, 71, 73, 78 and 82. Practical examples illustrate the new accounting requirements and more extensive note disclosures along with required supplementary information.

**6/6/2017**

Tuesday  
Ridgeland  
MSCPA Center

**Data Breaches & Other Cyber Frauds: A 21st Century Risk to Your Organization**

**Discussion Leader:** Dan Bradley

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

**Course Hours:** 8:30-12

**Level:** Basic **CPE Credit:** 4 General **VENDOR:** AICPA **ACRONYM:** CL4DATA

Course objectives and description: Is your data secure? Is your organization at risk of a data breach? What is cyber fraud and how can it affect your organization? How can you protect your company from cyber fraud? Data breaches and cyber fraud are an ever present risk for more companies. This course will help you understand and become more aware of the risks associated with data breaches and other cyber frauds. You will become more aware of the policies and procedures needed to protect your company data. We will review the requirements for internal controls over technology required by the 2013 COSO Framework on Internal Controls and review internal controls that can help prevent and detect cyber frauds, including data breaches. Become a resource for your company and your clients.

**6/6/2017**

Tuesday  
Ridgeland  
MSCPA Center

**Fraud: Recent Findings, Red Flags and Corruption Schemes**

**Discussion Leader:** Dan Bradley

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

**Course Hours:** 1:00-4:30

**Level:** Intermediate **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4FRAU

Course objectives and description: How are fraud schemes perpetrated? Who does it? How much is stolen? What controls can be installed to prevent and detect these schemes? These and other questions are answered by a review of landmark fraud studies - including those conducted by the Committee of Sponsoring Organizations (COSO), the Association of Certified Fraud Examiners (ACFE), large CPA firms, and others. A list of the Top Ten Fraud Schemes, based upon these studies, is provided. Fraud red flags for non-traditional schemes are addressed. The categories of non-traditional fraud schemes include corruption, Ponzi, and Asset Flip schemes. These non-traditional fraud schemes are not usually addressed in traditional fraud courses. However, numerous entities have incurred significant financial losses as a result of these schemes and issues concerning these schemes need to be addressed to prevent financial losses. These schemes methodologies, related red flags and internal controls to prevent and detect these schemes are addressed in detail. Real-world cases are provided to reinforce concepts.

**6/7/2017**

Wednesday  
Ridgeland  
MSCPA Center

**The Changing Role of the Controller: Advancing from Tactical to Strategic**

**Discussion Leader:** Matthew Ryan

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

**Course Hours:** 8:30-12

**Level:** Intermediate **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4COBP

Course objectives and description: Are you ready to take your role as controller to the next level while adding significant value to the organization? A successful Controller will go beyond financial statements, internal controls and general accounting to create new value for the organization. We'll ex-



**BUSINESS PLANNING**

- Corporate Financial Planning
- Mergers
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- Civil / Criminal Tax Litigation
- Civil / Criminal Tax Controversy
- Individual Tax Planning
- Business Tax Planning

**ESTATE PLANNING**

- Wills
- Trusts
- Personal Financial Planning
- Estate Litigation



Lacey L. Bailey,  
J.D., LL.M.

James Williams "Will"  
Janoush, J.D., LL.M.

Harris H. "Trip" Barnes III,  
J.D., LL.M.

S. Gray Edmondson,  
J.D., LL.M.

Brandon C. Dixon, J.D., LL.M.

Krista S. Andy, J.D., LL.M.

Of Counsel: Ronald A. Worley, J.D., LL.M.

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Litigated 40 trials before the  
United States Tax Court

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plore new additional roles that controllers are now accepting and outline a roadmap you can use to expand your role as a controller from simply internal process/transaction oriented to externally focused understanding of industry and macro trends.

**6/7/2017**  
Wednesday  
Ridgeland  
MSCPA Center  
**Analyzing a Company's Financial Statement**  
**Discussion Leader:** Matthew Ryan  
**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0  
**Course Hours:** 1:00-4:30  
**Level:** Basic **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4FSABM

Course objectives and description: More and more, clients are turning to you for advice on financial performance. Are you ready\* This course presents the financial statements as a set of dynamic instruments that can be used for accurate, relevant, and timely financial decisions. Focus on the economic and financial conditions that caused the statements to change and discover how businesses can manage liquidity, debt, and profitability. Plus, explore effect ratios, causal ratios, pro forma analysis, sustainable growth, and much more.

**6/8/2017**  
Thursday  
Ridgeland  
MSCPA Center  
**Reviewing Individual Tax Returns: What Are You Missing?**  
**Discussion Leader:** William F. (Bill) Taylor, CPA  
**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0  
**Course Hours:** 8:30-12  
**Level:** Intermediate **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4ITRM

Course objectives and description: Join us as we discuss the common errors practitioners make on individual tax returns that are often missed by review staff. The intent is to sharpen skills for reviewers by examining case studies and discussing issues where additional information from the client may be warranted and areas of tax law where proper treatment requires additional analysis and information. Multiple issues will be discussed including pass-through K-1s, home office issues, hobby losses, rental property, hiring spouses, depreciation, §179 issues, amortization and more! This course follows a highly illustrative case study format to increase participant comprehension and retention.

**6/8/2017**  
Thursday  
Ridgeland  
MSCPA Center  
**Social Security and Medicare: Maximizing Retirement Benefits**  
**Discussion Leader:** William F. (Bill) Taylor, CPA  
**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0  
**Course Hours:** 1:00-4:30  
**Level:** Intermediate **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4SSM

Course objectives and description: Our Social Security system provides retirement, disability, and survivor benefits to millions of Americans. The long-term future of Social Security and Medicare is uncertain, triggering concerns for many workers who are now paying into the system. Attend this course to learn about FICA, the Medicare tax, and more. You will cover real-world situations and use the tools provided to advise your clients to make optimal decisions when it comes to Social Security and Medicare.

**6/9/2017**  
Friday  
Ridgeland  
MSCPA Center  
**Tax Planning Strategies for Small Businesses: Corporations, Partnerships, & LLCs**  
**Discussion Leader:** William F. (Bill) Taylor, CPA  
**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0  
**Course Hours:** 8:30-12  
**Level:** Intermediate **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4STSB

Course objectives and description: Solid tax planning strategies are essential for your corporate and small business clients. Join us as we explore state-of-the-art planning ideas and tax-saving strategies to keep more of your client's money in their pockets. We'll answer the tough questions and show you what strategies are best for your clients as a result of the most recent tax reform.

**6/9/2017**  
Friday  
Ridgeland  
MSCPA Center  
**Protecting Your Client from Tax Return Identity Theft**  
**Discussion Leader:** William F. (Bill) Taylor, CPA  
**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0  
**Course Hours:** 1:00-4:30  
**Level:** Intermediate **CPE Credit:** 4 Tax **VENDOR:** AICPA **ACRONYM:** CL4TRF

Course objectives and description: Identity theft has become a serious issue with clients and practitioners alike. Sixty-three percent of CPAs who answered the 2015 tax software survey conducted by The Tax Adviser and Journal of Accountancy said at least one of their clients was a victim of tax identity theft in the 2015 filing season. This course will provide examples of the ramifications of data loss and how it impacted the practitioner and the client. This course will cover best practices for your firm to protect firm and client data. In the event that a breach does occur, learn the steps to take to remedy the situation and prevent the problem from happening again.

**6/12/2017**  
Monday  
Ridgeland  
MSCPA Center  
**Governmental Accounting and Reporting Advisor**  
**Discussion Leader:** Michael Morgan  
**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30  
**Course Hours:** 8:30-4:30  
**Level:** Intermediate **CPE Credit:** 8 A&A/YB **VENDOR:** AICPA **ACRONYM:** GARU

Course objectives and description: Responding to the need for greater clarity from stakeholders, GASB issued GASB Statement No. 72, Fair Value Measurement and Application. This standard, effective for reporting periods beginning after June 15, 2015, changed the way state and local governments report the value of investments and other financial instruments. This course explores case studies, real-world examples, and hands-on practice scenarios. Learn to apply the principles of this GASB standard to your governmental financial statements.

**6/13/2017**  
Tuesday  
Ridgeland  
MSCPA Center  
**Not-for-Profit Financial Reporting: Mastering the Unique Requirements**  
**Discussion Leader:** Michael Morgan  
**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30  
**Course Hours:** 8:30-4:30  
**Level:** Intermediate **CPE Credit:** 8 A&A/YB **VENDOR:** AICPA **ACRONYM:** NFPP-2

Course objectives and description: Do you know what makes not-for-profit accounting and financial reporting different? Are you aware of how not-for-profit financial statements will change as a result of the FASB's Financial Statement Project? Through a combination of practical guidance and case studies, this course will provide insight into what makes not-for-profits different while training you to clear key hurdles in not-for-profit accounting and reporting in an efficient and effective manner. Avoid the potholes of confusion and provide a financial picture that end users can truly understand.

**6/13/2017**

Tuesday

Tupelo

BanCorp South Conf. Ctr.

**Ethics, Rules, and Regulations****Discussion Leader:** Donna Ingram**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0**Course Hours:** 8:30-12**Level:** Update **CPE Credit:** 4 Ethics **VENDOR:** SELF **ACRONYM:** ERR-3

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.

**6/13/2017**

Tuesday

Tupelo

BanCorp South Conf. Ctr.

**Fraud: War Stories From the Battlefield****Discussion Leader:** Donna Ingram**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0**Course Hours:** 1:00-4:30**Level:** Intermediate **CPE Credit:** 4 A&A **VENDOR:** SELF **ACRONYM:** FWSB4

Course objectives and description: We continue to be under fire from fraud personally and professionally. To survive on the front lines we must continually update the tools used in our fight against fraud. In this session we will learn from the battles fought by others by analyzing how the fraud occurred and discussing the victories and defeats.

**6/13/2017**

Tuesday

Tupelo

BanCorp South Conf. Ctr.

**Identity Theft: Preventing, Detecting, and Investigating Identity Theft****Discussion Leader:** Douglas Warren**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30**Course Hours:** 8:30-4:30**Level:** Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** IDENT-1

Course objectives and description: Protect yourself and your clients from identity theft, which includes the theft of personal and professional identities. No one is immune from this rising tide of criminal misconduct and as your clients seek your advice, you will be required to perform due diligence in protecting their IDs. Some will even be tasked with investigating the crime. This course addresses the needs of each. As the instances of identity theft and data breaches continue, people are clamoring for ways to detect identity theft, protect themselves from becoming a victim, and investigating instances of theft when they strike. Don't allow you or your client to become the next victim!

**6/14/2017**

Wednesday

Ridgeland

MSCPA Center

**Advanced Controller and CFO Skills****Discussion Leader:** David Arnott**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30**Course Hours:** 8:30-4:30**Level:** Advanced **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** ACCS

Course objectives and description: This course examines best practices of leading-edge controllers and CFOs. Demonstrate your advanced skills that add value and contribute to the success of the organization. You will learn specific skills every CFO or controller needs to be successful, and you will find that you suddenly have more power and influence than you ever thought possible. Show the company's leadership how vital you are to their profitability!

**6/14/2017**

Wednesday

Tupelo

BanCorp South Conf. Ctr.

**Determining How Much Money You Need to Retire, and Tax Ideas and Money Management in Retirement****Discussion Leader:** William F. (Bill) Taylor, CPA**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$0**Course Hours:** 8:30-4:30**Level:** Update **CPE Credit:** 8 A&A **VENDOR:** SURGENT **ACRONYM:** DRMM

Course objectives and description: This course gives CPAs knowledge to help their clients implement tax-effective investment and portfolio strategies for successfully wealth accumulation and real after-tax retirement income maintenance.

**6/14/2017**

Wednesday

Tupelo

BanCorp South Conf. Ctr.

**K2's Tech Tools and Gadgets for a More Efficient You!****Discussion Leader:****Cost: Members:** \$155 **Non-Members:** \$195 **AICPA Member Discount:** \$0**Course Hours:** 8:30-12**Level:** Intermediate **CPE Credit:** 4 General **VENDOR:** K2 Enterprises **ACRONYM:** TTG-4

Course objectives and description: Technology – specifically the ever-evolving world of tools, gadgets, and apps – continues to awe and amaze while “The Internet of Things” is rapidly turning this evolution into a revolution. By learning how to utilize these tools and gadgets, you can enhance both personal and team productivity and, in this program, you will learn how to take advantage of many features in tools that you likely already own – such as Microsoft Windows and Microsoft Office – to become more productive. You will also learn about numerous applications and services to help with managing personal finances, creating and organizing notes and to-do lists, speaking text into your computer, invoking handwriting recognition, and improving personal information security. You will witness demonstrations of leading tools, gadgets, and apps – many of which are free – all designed to make you more efficient, effective, and productive. For more details, please visit [www.k2e.com/ttg-4](http://www.k2e.com/ttg-4).

**6/14/2017**

Wednesday

Tupelo

BanCorp South Conf. Ctr.

**K2's Microsoft Office-Improving Productivity with New Features****Discussion Leader:****Cost: Members:** \$155 **Non-Members:** \$195 **AICPA Member Discount:** \$0**Course Hours:** 1:00-4:30**Level:** Update **CPE Credit:** 4 General **VENDOR:** K2 Enterprises **ACRONYM:** OFF-4

Course objectives and description: It's here! Microsoft Office 2016 is now available to businesses of all sizes and if you are considering upgrading or have already upgraded, then you will no doubt want to join us for this four-hour seminar in which you will learn about the new features in Office 2016 and how you can, and should, put them to use. Included in Office 2016 are subtle, but important changes to the user interface, such as the following: \* The new “Tell Me” tool that should help you to find “hidden” functionality; \* A major upgrade to Outlook to enhance collaboration; \* Real-time co-editing with other team members in Word; \* New presentation tools with Microsoft Sway; and \* Built-in and improved business intelligence options in Excel with Power Query and enhanced visualization capabilities. Don't waste a moment of your valuable time trying to learn Office 2016 on your own; instead, let the team at K2 Enterprises assist you in maximizing your return on your investment in Office 2016! For more details, please visit [www.k2e.com/off-4](http://www.k2e.com/off-4).

**6/15/2017****Slashing Taxes for Your Small Business Clients: Corporations, Partnerships, & LLCs**



Thursday  
Tupelo  
BanCorp South Conf. Ctr.  
**Discussion Leader:** William F. (Bill) Taylor, CPA  
**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30  
**Course Hours:** 8:30-4:30  
**Level:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** STSB-1

Course objectives and description: Solid tax planning strategies are essential for your corporate and small business clients. Join us as we explore state-of-the-art planning ideas and tax-saving strategies to keep more of your client's money in their pockets. We'll answer the tough questions and show you what strategies are best for your clients as a result of the most recent tax reform.

6/15/2017  
Thursday  
Tupelo  
BanCorp South Conf. Ctr.  
**K2's QuickBooks Online and Other Top Accounting Software for Small Businesses**  
**Discussion Leader:**  
**Cost: Members:** \$275 **Non-Members:** \$345 **AICPA Member Discount:** \$0  
**Course Hours:** 8:30-4:30

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

Course objectives and description: New Course for 2017! For businesses with up to \$15 million in annual revenue, the number of accounting applications available today can be staggering! Cloud-based solutions such as QuickBooks Online, Xero, Accounting Power, and Wave are growing in breadth and depth while traditional desktop and client-server applications continue to add more features, including hosted options. On top of all of this, financial reporting and other add-on solutions can further complicate your decision as to which tools you/your clients should use. Join us in this seminar to learn which small business accounting application might be the best fit for your/your client's specific needs and you can maximize the return on investment for the solution you choose. You will learn about each solution's key features, target markets, approximate pricing, integration options, and other relevant factors to assist in make the right decision. This is the one "must-attend" seminar for anyone working in a small business or providing services to small businesses. For more details, please visit [www.k2e.com/qoa](http://www.k2e.com/qoa).

6/15/2017  
Thursday  
Ridgeland  
MSCPA Center  
**Ethical Leadership for Mississippi CPAs: Power, Influence, Integrity and Trust**  
**Discussion Leader:** Richard Karwic  
**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0  
**Course Hours:** 8:30-12

**Level:** Intermediate **CPE Credit:** 4 Ethics **VENDOR:** Executive Education **ACRONYM:** EL

Course objectives and description: Leaders naturally wield power and influence at work – but not all use those invaluable tools with integrity. Leaders are constantly tempted to abuse their power, sometimes in ways that inflict great harm. Betraying trust can destroy careers, whole organizations and lives. This is why trust is a top prerequisite for principled and ethical leadership. Trust changes everything. Research shows that leaders who continually work to earn and keep authentic trust reap enormous payback in all aspects of doing business.

6/15/2017  
Thursday  
Ridgeland  
MSCPA Center  
**Better Performance Plans: Get Stronger Results from Your Compensation Plan**  
**Discussion Leader:** Richard Karwic  
**Cost: Members:** \$150 **Non-Members:** \$190 **AICPA Member Discount:** \$0  
**Course Hours:** 1:00-4:30  
**Level:** Intermediate **CPE Credit:** 4 A&A **VENDOR:** Executive Education **ACRONYM:** BPP

Course objectives and description: Why do some company performance plans inspire strong results while others sputter or even backfire? Ineffective incentive plans often lack the advantage of important lessons from behavioral economics that help avoid potential pitfalls. This seminar offers discussion and cases to expand your knowledge of how and why performance incentives work, learn what other companies are doing, and take a fresh look at your own plan. You will have fun in this fast-paced, informative session.

6/16/2017  
Friday  
Ridgeland  
MSCPA Center  
**Executive Education's Annual CFO Spotlight: 4 Select Issues**  
**Discussion Leader:** Richard Karwic  
**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$0  
**Course Hours:** 8:30-4:30

**Level:** Intermediate **CPE Credit:** 8 A&A **VENDOR:** Executive Education **ACRONYM:** CFO Series: Managing Risk

Course objectives and description: Due to the popularity of Executive Education's five-day CFO series, we are now making it possible to schedule single CFO Series days. Each day consists of four topics. Choose the speaker and topic that works best for you. The 4 Topics Discussed: *Beyond Traditional Budgeting: Using Performance Metrics for Planning and Control*; *Pricing for Profitability*; *Why Cost Matters*; *Contemporary Cost Concepts: Understanding Activity-Based Costing*; *Communicating Financial Information to Non-Accountants*

6/19/2017  
Monday  
Ridgeland  
MSCPA Center  
**Reviewing Pass-Through Tax Returns: What Are You Missing?**  
**Discussion Leader:** Michael Frost  
**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30  
**Course Hours:** 8:30-4:30

**Level:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** RPTR

Course objectives and description: Join us as we discuss the common errors practitioners make on pass through tax returns that are often missed by review staff. The intent is to sharpen skills for reviewers by examining case studies and discussing issues where additional information from the client may be warranted and areas of tax law where proper treatment requires additional analysis and information. Multiple issues will be discussed and both partnership and S corporation returns will be covered. This course follows a highly illustrative case study format to increase participant comprehension and retention.

6/19/2017  
Monday  
Gulfport  
Marriott Courtyard  
**Nexus Update: Latest Developments in State Income, Franchise, and Sales Taxes**  
**Discussion Leader:** Dennis Riley  
**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30  
**Course Hours:** 8:30-4:30  
**Level:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** NXUP-2

Course objectives and description: The barriers to doing business across state lines have significantly decreased in recent years. However, this creates additional issues for taxpayers and their preparers in determining where and when they have nexus in a state which would require them to file either state income tax or sales tax returns. This class will not only help equip you in learning the various ways that states define and enforce nexus but also in how to determine when your company or client has nexus in a state, thus requiring the filing of tax returns.

**6/19/2017**

Monday

Gulfport

Marriott Courtyard

**Governmental and Not-for-Profit Annual Update****Discussion Leader:** Bruce Shepard**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30**Course Hours:** 8:30-4:30**Level:** Update **CPE Credit:** 8 A&A/YB **VENDOR:** AICPA **ACRONYM:** GNAU-1

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

**6/20/2017**

Tuesday

Gulfport

Marriott Courtyard

**Slashing Taxes for Your Small Business Clients: Corporations, Partnerships, & LLCs****Discussion Leader:** Dennis Riley**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30**Course Hours:** 8:30-4:30**Level:** Intermediate **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** STSB-2

Course objectives and description: Solid tax planning strategies are essential for your corporate and small business clients. Join us as we explore state-of-the-art planning ideas and tax-saving strategies to keep more of your client's money in their pockets. We'll answer the tough questions and show you what strategies are best for your clients as a result of the most recent tax reform.

**6/20/2017**

Tuesday

Gulfport

Marriott Courtyard

**Leases: Mastering the New FASB Requirements****Discussion Leader:** Bruce Shepard**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30**Course Hours:** 8:30-4:30**Level:** Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** LEAS-1

Course objectives and description: How do the leasing requirements in the new standard differ from current GAAP? This course addresses that question by examining the core principles of the new standard, including identification, recognition, measurement, presentation and disclosure requirements. Examples are included to illustrate application of the new standard. This course explains the lessee accounting model, including lease classification, amortization of the right-of-use asset, and interest on the lease liability. This course also explains the lessor accounting model, including transfer of risk, profit recognition, and collectability. Additional topics include short-term leases, purchase options, variable lease payments, and sale and leaseback transactions.

**6/20/2017**

Tuesday

Ridgeland

MSCPA Center

**Understanding and Creating an Internal Control Structure****Discussion Leader:** Karl Egnatoff**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$0**Course Hours:** 8:30-4:30**Level:** Intermediate **CPE Credit:** 8 A&A **VENDOR:** Phoenix Beach **ACRONYM:** UCIC

Course objectives and description: Successful organizations, both large and small, must understand the importance of effect internal controls and be able to develop a system of controls that will keep the entity on its intended course. Moreover, those that design policies and procedures, benefit by knowing why control measures are necessary. This session sets forth internal control concepts and explains the importance of strong internal control policies. The material highlights some of the reasons that measures are needed and it also provides an overview of control creation methods. Finally, it discusses ways to successfully implement the developed policies and procedures. Participants that take this course will gain a well-rounded understanding of internal control procedures of all types.

**6/21/2017**

Wednesday

Ridgeland

MSCPA Center

**Understanding the Complexities of Fraud in Order to Develop Ways to Mitigate Risk****Discussion Leader:** Karl Egnatoff**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$0**Course Hours:** 8:30-4:30**Level:** Intermediate **CPE Credit:** 8 A&A **VENDOR:** Phoenix Beach **ACRONYM:** UCFR

Course objectives and description: All organizations, regardless of size, must be aware of the risks associated with intentional fraudulent acts. Fraud activities can be executed from within an organization, by parties outside an entity, or by both. One of the primary ways to thwart fraud is to understand how and why it occurs. In this session, we delve into the reasons that both internal and external intentional defalcations take place. The material discusses how difficult it can be to see some of the motives driving those that undertake fraud. We then discuss measures that organizations can implement to help stop fraud activities and add security to the entire enterprise.

**6/21/2017**

Wednesday

Gulfport

Marriott Courtyard

**Financial Statement Analysis: Basis for Management Advice****Discussion Leader:** Cecil M.. (Bill) Felder**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30**Course Hours:** 8:30-4:30**Level:** Basic **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** FSABM

Course objectives and description: More and more, businesses turn to you for advice on financial performance. Are you ready? This course presents the financial statements as a set of dynamic instruments that can be used for accurate, relevant, and timely financial decisions. Focus on the economic and financial conditions that caused the statements to change and discover how businesses can manage liquidity, debt, and profitability. Plus, explore effect ratios, causal ratios, pro forma analysis, sustainable growth, and much more.

**6/21/2017**

Wednesday

Gulfport

Marriott Courtyard

**Identity Theft: Preventing, Detecting, and Investigating Identity Theft****Discussion Leader:** Bruce Shepard**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30**Course Hours:** 8:30-4:30**Level:** Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** IDENT-2

Course objectives and description: Protect your client and your clients from identity theft, which includes the theft of personal and professional identities. No one is immune from this rising tide of criminal misconduct and as your clients seek your advice, you will be required to perform due diligence in protecting their IDs. Some will even be tasked with investigating the crime. This course addresses the needs of each. As the instances of identity theft and data breaches continue, people are clamoring for ways to detect identity theft, protect themselves from becoming a victim, and investigating instances

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of theft when they strike. Don't allow you or your client to become the next victim!

**6/22/2017**

Thursday  
Ridgeland  
MSCPA Center

**The Importance of Security for Digital Information**

**Discussion Leader:** Karl Egnatoff

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

**Course Hours:** 8:30-12

**Level:** Basic **CPE Credit:** 4 A&A **VENDOR:** Phoenix Beach **ACRONYM:** ISDI

Course objectives and description: The amount of electronic content that business organizations contend with is growing at incredible rates. Terms like "Big Data" and "Information Overload", are being used by overwhelmed information workers on a daily basis. All of this data must be secured; not only to make sure it is not damaged and remains available to those that need it, but also against theft or misuse. This session discusses the places that businesses keep digital information and addresses the importance of securing corporate electronic data. The material effectively shows ways to achieve high security standards for content stored in fixed locations, on mobile devices and in the cloud. Participants in this session will gain an understanding of the concepts needed to improve the way they, and their companies secure digital information.

**6/22/2017**

Thursday  
Ridgeland  
MSCPA Center

**Preparation, Compilation, and Review Engagements: Update and Review**

**Discussion Leader:** Dana Maxwell

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

**Course Hours:** 1:00-4:30

**Level:** Update **CPE Credit:** A&A **VENDOR:** AICPA **ACRONYM:** CI4COMP

Course objectives and description: If you supervise preparation, compilation, and review engagements, this course will help you comply with the professional standards by informing you of the latest developments and issues relevant to these engagements. Learn about the U.S. business economy, peer review, FASB updates, International Financial Reporting Standards, and other areas affecting preparation, compilation, and review engagements.

**6/23/2017**

Friday  
Ridgeland  
MSCPA Center

**Internal Controls for Small- and Medium-Sized Entities**

**Discussion Leader:** Daryl Drause

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

**Course Hours:** 8:30-12

**Level:** Basic **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4ICSM

Course objectives and description: This course provides practical guidance for those involved with internal control responsibilities (auditing, monitoring, implementing, etc.) in adapting the updated COSO Internal Control Framework to small and medium-sized entities' transaction processing systems. Transaction processing IT and manual controls are appropriate for every entity, regardless of size. However, there is no standard set of transaction processing controls that can be applied to all entities. Oftentimes the transaction processing manual and IT internal controls "best practices" that have evolved over time are based upon large entity environments and these "best practices" are not necessarily relevant to small and medium-sized entities. Even those with transaction processing control responsibilities who are involved with large entities should benefit from this course as large entities are often a conglomeration of divisions, stores, departments, etc. Many controls that are appropriate for small and medium-sized entities are also appropriate in these decentralized environments.

**6/23/2017**

Friday  
Ridgeland  
MSCPA Center

**The New Clarified Attestation Standards: What You Need to Know**

**Discussion Leader:** Daryl Drause

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

**Course Hours:** 1:00-4:30

**Level:** Basic **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4CAS

Course objectives and description: What is an attest engagement? This course will introduce practitioners to the three main types of attest engagements - examinations, reviews, and agreed upon procedures. What are the requirements of an attest engagement? Risk assessment, test of controls, and reporting are among the topics that will be covered. With the completion of the Attest Clarity Project, there are changes to the format of the standards. The new standards will be issued as four sections that will supersede AT sections 20, 50, 101, and 201. This course will highlight the changes and review the requirements of attest engagements.

**6/26/2017**

Monday  
Ridgeland  
MSCPA Center

**Employment Law Update: Key Risks and Recent Trends**

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

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

**Course Hours:** 8:30-4:30

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

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

**6/26/2017**

Monday  
Ridgeland  
Holmes CC

**Valuing a Business: What is this Company Worth?**

**Discussion Leader:** Don Mingos

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

**Course Hours:** 8:30-12

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

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

**6/26/2017**

Monday  
Ridgeland  
Holmes CC

**How Good Companies Become Great: Secrets to Success**

**Discussion Leader:** Don Mingos

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

**Course Hours:** 1:00-4:30

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

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

**6/27/2017**  
Tuesday  
Ridgeland  
Holmes CC

**Predicting the Future: Create the Best Projections You Can**

**Discussion Leader:** Don Mingos

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

**Course Hours:** 8:30-4:30

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

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

**6/27/2017**

Tuesday  
Ridgeland  
MSCPA Center

**Leases: Mastering the New FASB Requirements**

**Discussion Leader:** Thomas Sheets

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

**Course Hours:** 8:30-4:30

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

Course objectives and description: How do the leasing requirements in the new standard differ from current GAAP? This course addresses that question by examining the core principles of the new standard, including identification, recognition, measurement, presentation and disclosure requirements. Examples are included to illustrate application of the new standard. This course explains the lessee accounting model, including lease classification, amortization of the right-of-use asset, and interest on the lease liability. This course also explains the lessor accounting model, including transfer of risk, profit recognition, and collectability. Additional topics include short-term leases, purchase options, variable lease payments, and sale and leaseback transactions.

**6/28/2017**

Wednesday  
Ridgeland  
Holmes CC

**Governmental and Not-for-Profit Annual Update**

**Discussion Leader:** Melisa Galasso

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

**Course Hours:** 8:30-4:30

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

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

**6/28/2017**

Wednesday  
Ridgeland  
MSCPA Center

**Revenue Recognition: Mastering the New FASB Requirements**

**Discussion Leader:** Thomas Sheets

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

**Course Hours:** 8:30-4:30

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

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

**6/29/2017**

Thursday  
Ridgeland  
Holmes CC

**Technology for CPAs: Don't Get Left Behind**

**Discussion Leader:**

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

**Course Hours:** 8:30-4:30

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

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

**6/29/2017**Thursday  
Ridgeland  
MSCPA Center**Form 1041: Income Taxation of Estates and Trusts****Discussion Leader:** Stephen Renberg**Cost: Members:** \$270 **Non-Members:** \$340 **AICPA Member Discount:** \$30**Course Hours:** 8:30-4:30**Level:** Basic **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** ITET

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

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

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

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

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

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 Are you an AICPA Member? ☐ Yes ☐ No AICPA# \_\_\_\_\_  
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### Course Selection

Course Information				Fee Information			
Course Date	Course Title	Course Code	Printed Materials Y/N	MSCPA Member Fee	Non-Member Fee	AICPA Discount (when applicable)	Subtotal

Total \$ \_\_\_\_\_

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**If you have not received an email confirmation two business days prior to the course date, please contact the society office at 601-856-4244. You may fax your completed registration form to 601-856-8255 or mail it to MSCPA, 306 Southampton Row, Ridgeland, MS 39157.**



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