

**MEMORIAL GIFT**  
to the  
**EDUCATION FOUNDATION**  
in memory of

**JOHN R. MURPHY**  
Jackson

by  
**Ronald E. Russell**  
Jackson



**MSCPA**

MISSISSIPPI SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS  
VOLUME XLIV  
MAY 2019

## Absentee Ballots Available for Officer Election

The Nominations Committee submits candidates for election to fill each office and for the at-large Board of Directors position for 2019-2020. See pages 6-7 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 22, 2019, during the MSCPAs 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 no later than June 17** (five days prior to the Annual Meeting on June 22). The Bylaws resolution will be included for voting.

## New CPAs Honored by State Board at April 27 Ceremony



*The Mississippi State Board of Public Accountancy recognized new CPAs during their Spring Ceremony Saturday, April 27, at the capitol in Jackson. MSCPAs Chairman Annette Herrin introduced the new CPAs to the Society and Lydia Windham, President of the MSCPAs Young CPA Network, provided an overview of the Network and invited the new CPAs to become active. Keynote speaker was Joseph Rugger, past recipient of the Arkansas Society of CPAs Outstanding Emerging CPA Award. Willie Sims, Chairman of the State Board, administered the Oath of Title. New CPAs recognized were Melanie Harris Ainsworth, Katy M. Atkins, Nicole B. Beasley, Simon E. Collier, II, Larissa Yolanda Crosby, Nicole Victoria Digiovanni, Jonathon Clifford Fults, Leslie Caroline Gilbert, Hannah Allen Hoffman, Kelly Ann Jamieson, Larry L. March, James Walker Martin, Blane J. Morgan, Jason G. Morgan, Irmalene B. Rainey, Jesse David Shields, Ryan Walker Smith, Reagan Huey Stovall, Fred M. Sutphen, Jr., and Christy Renee Thornton.*

**Register Now!**

**JUNE 20-23, 2019**

**2019 MSCPAs**  
**ANNUAL CONVENTION**  
SANDESTIN

## Officer Nominations and Election Process Resolution Vote

The Board of Governors approved Bylaws changes as recommended by the Long Range Planning Committee regarding the officer nominations and election process. The highlights of the changes include moving from a two candidate ballot to a single candidate, expanding the nominating committee, and removing floor nominations at the annual meeting. The Bylaws resolution can be found on the MSCPAs website on the Policies and Bylaws webpage and was published in the March Newsletter for consideration of the membership in advance of the resolution vote at the annual meeting at Sandestin in June.



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306 Southhampton Row  
The Commons  
Highland Colony Parkway  
Ridgeland, MS 39157  
PHONE: (601) 856-4244  
FAX: (601) 856-8255  
E-MAIL ADDRESS:  
memberservices@ms-cpa.org

## OFFICERS

### *Chairman*

Annette Herrin  
HATTIESBURG

### *Vice Chairman/Chairman-Elect*

Donna Bruce  
JACKSON

### *Treasurer*

Jimmy Wood  
JACKSON

### *Secretary*

Samantha Moore  
RIDGELAND

### *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

## KATY ATKINS

Yokohama Tire Manufacturer MS, LLC  
Caledonia

## KIRK C. BRODHEAD

Kirk C. Brodhead CPA Ltd  
Lafayette, LA

## SHAWN BROWNING

Harper, Rains, Knight & Company  
Ridgeland

## CHRIS D. BURNHAM

Carr, Riggs & Ingram, LLC  
Flowood

## SIMON E. COLLIER, II

Carr, Riggs & Ingram, LLC  
Canton

## DAVID M. DARNELL

Watkins, Ward and Stafford, PLLC  
Louisville

## HAYLEY DEER

HORNE LLP  
Madison

## NICOLE DIGIOVANNI

Faust & Associates CPAs, P.A.  
McComb

## ZACH DODD

Harper, Rains, Knight & Company  
Ridgeland

## SHELBY H. JOHNSON

Mississippi Export Railroad  
Moss Point

## MICHELLE LEWIS

Harper, Rains, Knight & Company  
Ridgeland

## CARRIE OAKES

Byhalia

## ROBERT E. PETRO

Petro & Associates, P. C.  
Mobile, AL

## RYAN SMITH

Haddox Reid Eubank Betts PLLC  
Jackson

## STEVE SOLOMON

Harper, Rains, Knight & Company  
Ridgeland

## RUSS THOMPSON

Harper, Rains, Knight & Company  
Ridgeland

## CHRISTY THORNTON

May & Company, LLP  
Vicksburg

## MICHAEL S. TORRES

MS Office of the State Auditor  
Brandon

## LORETTA WILLIAMS

Harper, Rains, Knight & Company  
Ridgeland

## LATICIA WILSON

The Sqwincher Corporation  
West Point

## Southwest Chapter Donates \$1,000 to MSCPA Education Foundation



The MSCPA Southwest Chapter presented a \$1,000 contribution to the MSCPA Education Foundation to benefit the scholarship fund. Presentation was made at the April 30 Southwest Chapter meeting and social event in Natchez. MSCPA Chairman Annette Herrin, left, and MSCPA President/CEO Karen Moody, right, received the check from Ryan Wingfield, center, MSCPA Southwest Chapter President and Board Representative.



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# Member News

## Top 50 Under 40

Congratulations to MSCPA members **Jessica Cooley**, **Shawn Gillenwater**, and **John Norris** for being recognized by the Mississippi Business Journal as a "Top 50 Under 40" business leader in Mississippi. The award recognizes the state's 50 up-and-coming business leaders under the age of 40. A luncheon was held in their honor on April 25 and recipients will be profiled in a special MBJ publication later this month.



**Jessica Cooley** is a Principal at GranthamPoole in Ridgeland and is a graduate of the University of Southern Mississippi.



**Shawn Gillenwater** is a Senior Tax Manager at Haddox Reid Eubank Betts in Jackson and is a graduate of Millsaps College. Shawn was also named a Top 10 Finalist.



**Josh Norris** is Managing Member at Corkern & Norris/Lefleur Financial in Jackson and is a graduate of the University of Mississippi and New York University.

## Board Nominates Stacy Thomas for Trustee

In accordance with the Trust Agreement of the MSCPA 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 MSCPA has reappointed Stacy Thomas of Jackson. Other trustees of the Foundation are James W. Davis of Oxford and Josh Norris of Jackson.

## MSCPA Recognizes Outstanding Senior Accounting Majors

In the spring of each year the MSCPA recognizes seniors majoring in accounting from colleges and universities all across the state of Mississippi. Award winners were presented with their awards at an on campus event (such as an award banquet, honors day or baccalaureate service). The 2019 recipients are:

**ALCORN STATE UNIVERSITY**  
Jalynn Everett

**BELHAVEN UNIVERSITY**  
Howard C. Wilkins

**DELTA STATE UNIVERSITY**  
Marshal A. Salley

**JACKSON STATE UNIVERSITY**  
Lynise M. Sparks

**MILLSAPS COLLEGE**  
Jack Brady

**MISSISSIPPI STATE UNIVERSITY**  
Sarah Elizabeth King

**MISSISSIPPI UNIVERSITY FOR WOMEN**  
Arielle Dauber

**MISSISSIPPI VALLEY STATE UNIVERSITY**  
Steven McIntosh

**UNIVERSITY OF MISSISSIPPI**  
Robert Samuel Loeb

**UNIVERSITY OF SOUTHERN MISSISSIPPI**  
Paige D. Dillistone

**WILLIAM CAREY UNIVERSITY**  
Rachel Smith



*Paige D. Dillistone, MSCPA Outstanding Senior Accounting Major from the University of Southern Mississippi*

# Register Now for the MSCPA 2019 Annual Convention

**Join other MSCPA members in Destin, June 20-23!**

MSCPA's Annual Convention is the avenue to promote fellowship among the members. The Officers and Board of Governors welcome members, their families and guest 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. 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 5th 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.

## 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 22, 2019 at nine o'clock. The election of officers, reports from officers, and other business will be conducted at this time.

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## 2019-2020

### Chairman Donna Bruce, Jackson

## MEET THE CANDIDATES

The election is scheduled for Saturday, June 22, 2019 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: Bill Taylor-Chairman, Water Valley; Jan Lewis, Jackson; David Miller, Tupelo; Wil Crawford, Jackson; and Pam Steverson, Meridian.

#### Vice Chairman / Chairman-Elect



**RICHARD D. "RICKY" BULLOCK** is a Shareholder with Nail McKinney Professional Association in Tupelo where he serves as Firm Treasurer. With twenty one years of auditing and public accounting experience, Ricky primarily focuses on the areas of federal and state taxation, construction, manufacturing, timber, healthcare and employee benefit plans. He also serves as the firm's QuickBooks Certified Pro-Advisor. Ricky graduated from the University of Mississippi with a

Bachelor of Accountancy and a Master of Taxation.

Ricky has served the Society as Treasurer of the MSCPA and is a member of the Long Range Planning Committee where he is their appointed Convention Liaison with Sandestin. He also serves on the MSCPA Young CPA Liaison Committee which works with the Young CPA Network to mentor and support their efforts. Ricky is Past-President of the Northeast Chapter and has served as a member of the Board of Governors and the Executive Committee.

As an active member of Tusculumbia Baptist Church in Booneville, Ricky serves as a Sunday school teacher and is currently the Assistant Treasurer and Finance Committee member. He and his wife, Carrie, have one daughter, Jill.



**ANNETTE K. PRIDGEN** served as an associate professor of accounting at Jackson State University before retiring in May. She previously served on the faculty of The University of Mississippi as an assistant professor. 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 holds undergraduate and graduate degrees in accounting from Jackson State University and a Ph.D. in accounting from

The University of Mississippi.

Annette has served as MSCPA Secretary and is a long time member of the Awards, Education and Scholarships Committee which she has been chairman of since 2014. She has also served on the Board of Governors and the Executive Committee. She is currently a co-author of the centennial MSCPA history book project.

Annette is a certified government financial manager and a certified internal control auditor. She is a member of several professional organizations, including the AICPA and the Association of Government Accountants. 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. She also served on the GAO Yellow Book Advisory Council to update the government auditing standards.

Annette has been married to her childhood sweetheart, Joseph, for 44 years. They have four children and four grandchildren. She attends Sweet Rest Church in Pearl, MS, where her husband is pastor.

#### Treasurer



**PEYTON C. CAVIN** is a partner with Silas Simmons, LLP in Natchez. He joined Silas Simmons after graduating summa cum laude from Mississippi College in 2007. Peyton primarily practices in the areas of taxation and compilation and review services for the oil and gas, banking, not-for-profit, manufacturing, and other industries. He routinely speaks on taxation and accounting for the Natchez Entrepreneur Academy and is a graduate of the Leadership Natchez Program.

Peyton is a prior member of the Young CPA Board of Directors, where he served as Communications

Committee Chair. He currently serves on the Legislation and Banking Committees. He will represent the Southwest Chapter as Secretary-Treasurer in the coming year.

Peyton is very active in the community and believes in giving back. He currently serves as Treasurer of the Natchez Little Theatre, Treasurer of the Wilkinson County Main Street Association, and President-elect of the Beau Pre' Property Owners' Association. He also is Treasurer and Chairman-elect of the Natchez-Adams County Chamber of Commerce and is a board member of the Natchez-Adams County Humane Society. Other involvement includes the Krewe of Phoenix, the Santa Clause Committee, the Woodville Zoning Committee, and the Woodville Historic Preservation Committee. Peyton is currently the President of the Natchez Trace Kiwanis Club and is involved in its many fundraising events for the benefit of local children.

Peyton is married to Dr. Melissa Jones Cavin, and they are members of Trinity Episcopal Church, where Peyton serves as Treasurer and Chair of the Finance Committee.



**KIMBERLY WILLIAMS** is the Director of Accounting for Medical Management Services. In her position, she oversees the accounting for MEA Medical Clinics as well as other medical practices. Kimberly received her Bachelor of Accountancy from Mississippi State University and MBA from Mississippi College.

Kimberly has been active in the MSCPA since she received her CPA license in 2013. She previously served as the Vice-President/Events Chair and was then elevated to Young CPA Network President. Under her leadership the Young CPA Network received the Mississippi Food

Network's Volunteer of the Year Award for statewide participation in the MSCPA Annual Day of Service. Upon completion of her year as Young CPA Network President, Kimberly served on the Board of Governors for the MSCPA as the Young CPA Network representative, joined the Young CPA Liaison Committee and began serving as the chair of the Industry Committee. Kimberly enjoys speaking to students on behalf of the MSCPA to promote leadership skills, the accounting profession and the CPA designation. In 2018, Kimberly received the MSCPA's Rising Star Award.

Kimberly serves on the Board of Ellipsis International, which is a non-profit organization. She also serves on the Board of the Mississippi Chapter of the Healthcare Financial Management Association as the Membership Chair. In her spare time, Kimberly enjoys volunteering at local organizations and supporting charities through 5k participation. Kimberly serves in the Preschool Ministry at the Madison Campus of Pinelake Church. Kimberly and her husband Drew have two children and live in Madison.



## Secretary



**PHILLIP CARR** is a partner with DeVoe Carr, PLLC in Oxford. A graduate of the University of Mississippi, he has over 30 years of experience in public and private sector accounting. At DeVoe Carr, his primary area of practice covers accounting and tax services for closely held businesses and nonprofit organizations. He is also a Certified Construction Industry Financial Professional, having earned this credential when the initial examination was given after the Institute of CCIFPs was established in 2003.

Phillip was one of the organizers of the Northwest Chapter of the MSCPA in 2012 and served as the chapter president in its first years of existence. He has also been a member of the MSCPA Board of Governors representing the Northwest Chapter.

Phillip lives in Water Valley with his wife, Leslie and their 17 year old daughter, Emily. An active lay member of First United Methodist Church of Water Valley, Phillip presently serves as chairman of the church council. He is also involved with the New Room movement of Methodist, Wesleyan, and Anglican church members. In his community, Phillip is currently serving his third term as hospital board member and treasurer of Yalobusha Health Services, the community health system that serves Yalobusha County.



**TOM WALKER** is a partner in the Corporate Practice Group of Jones Walker, LLP, in Jackson. Tom focuses his practice on commercial and regulatory matters in the financial services industry, with a depth of experience representing financial institutions. Tom received his Bachelor of Accountancy and Masters in Professional Accountancy from Mississippi State University, and he received his J.D. from the University of Mississippi.

Tom has been an active Certified Public Accountant in Mississippi since 2001, and currently serves on the Board of Governors for the Society as the Central Chapter representative, and as a member of the Long Range Planning Committee. Tom has previously served as a member of the Health Care Services and Legislation Committees, as well as the first Millennial Chair of the Long Range Planning Committee. He also was a member of the initial board of directors of the Young CPA Network.

In addition to his service to the MSCPA, Tom has previously served as Chairman of the Attorneys Committee of the Mississippi Bankers Association during the 2017-2018 fiscal year, and currently serves as a member of that committee as well. He has also served as Treasurer and member of the Executive Council of the Mississippi Young Bankers, and has been named in Best Lawyers in America® in the areas of Banking and Finance Law, Business Organizations (including LLCs and Partnerships), Corporate Law, Financial Services Regulation Law and Mergers and Acquisitions Law. In 2011, Tom was named to the Mississippi Business Journal's "Top 40 under 40" in 2011. He currently lives in Jackson with his wife, Crissie, and his two sons, Friend and John William.

## At-Large Board Member



**BETH B. BURGESS** is president of The Burgess Group, PA in Flowood where she serves clients as a business consultant, tax advisor and planner. After graduating from the University of Southern Mississippi in 1980, she began her career at Hagaman, Roper, Haddox & Reid. Subsequently she worked for Crowell, Thames & Hart, Ltd. where she was made shareholder and eventually president of the firm. In 2001, Beth, along with Gloria Crechale and Jeffery Necaice, formed Burgess, Crechale & Necaice, PA.

Beth enjoys working with young men and women, educating them on the income tax process and how taxpayers can best plan for their individual situation. She also serves as a mentor to women accountants entering the workforce based on her experience in balancing a career and the needs of her family.

Beth has been active in the MSCPA throughout her career and served as Chairman of the Board in 2013-2014. She is a long-time member of the Firm Administration and Development Committee and served numerous years as chairman. She is also a member of the Long Range Planning Committee and has served on the Executive Committee and multiple terms on the Board of Governors.

Beth has been recognized by the *Mississippi Business Journal* as one of the "Top 40 Under 40" and Mississippi's "50 Leading Business Women".

She and her husband, John, reside in Brandon. They are the parents of two adult daughters, Laura (married to Aaron Freeman), a registered nurse and Kim (married to Eric Warren), an oil company insurance director. John and Beth are the proud grandparents to Bo. They are members of First Baptist Church of Jackson.



**SIM M. MOSBY** joined the team of Silas Simmons, LLP in Natchez in 1990, was admitted as a partner in 2002, and became managing partner in 2019. His practice covers the areas of tax planning, compliance, and accounting services for businesses, individuals, estates and trusts, personal financial planning, and audits of financial institutions and local governments. He holds the designation of Personal Financial Specialist and is a member of the Personal Financial Planning Section of the AICPA.

Professionally, Sim is a past Chairman of the Board of the MSCPA; member of LCPA; past president, vice-president, and treasurer of the Southwest Chapter of MSCPA; past member of the MSCPA Board of Governors and Executive Committee; past chairman of the MSCPA Firm Administration Committee; and a member of the AICPA, in which he served a three year elected position as AICPA Member of Council.

A faithful member of Jefferson Street United Methodist Church, Sim has held the titles of treasurer, past finance committee member, past administrative board member, and past building committee member. Active in the community, Sim is a member and past chairman and past treasurer of the Natchez-Adams County Chamber of Commerce, member and past president of the Rotary Club of Natchez, board member of Natchez Now (economic development), past board member local Ducks Unlimited Chapter, past president of Natchez Kiwanis Club, past board member of Court Appointed Special Advocates, past board member of the Greater MS River Balloon Festival, and past board member and treasurer of the Krewe of Phoenix.

Sim is married to Betsy Colebank Mosby and is the father of two sons, Cole Mosby (attending Ole Miss and majoring in accounting) and Sam Mosby (attending Cathedral High School and excelling in sports).

## Education Foundation Trustee



**STACY THOMAS** is a shareholder in the Jackson office of the law firm Baker, Donelson, Bearman, Caldwell and Berkowitz, PC. He has practiced with the Firm since 1996. He focuses on federal and state tax issues, tax disputes, and estate planning. Stacy is a graduate of Mississippi State University and has served as President of the alumni Advisory Council for the Adkerson School of Accountancy. He received his law degree from Vanderbilt University and a master's degree in tax law from New York University. Stacy has enjoyed opportunities to serve the

Society in many capacities over the years, including Chairman of the Board, Treasurer, member of the Board of Governors and member of the Executive Committee. He has chaired the Society's Public Service Award Committee and served several terms on the Nominations Committee. Stacy has also held several offices in the Central Chapter (most recently President) and is on the Taxation Committee. He has served as chair of the Taxation Section of the Mississippi Bar Association and president of the Estate Planning Council of Mississippi. He also serves on the Board of Directors of the Community Foundation for Mississippi. Stacy is completing one term as MSCPA Education Foundation Trustee. He and his wife, Ginger, reside in Madison and have two sons.



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# CPA License Presentation Ceremony



*New members of the MSCPA Leslie Caroline Gilbert, Hannah Allen Hoffman, Kelly Ann Jamieson, James Walker Martin, and Fred M. Sutphen, Jr., pictured with Annette Herrin, MSCPA Chairman; Lydia Windham, MSCPA Young CPA Network President; Karen Moody, MSCPA President/CEO; and Joseph Rugger, Keynote Speaker.*



*Ryan Walker Smith of Haddox Reid Eubank Betts PLLC receives his CPA license from Willie B. Sims, Jr., Board Chair.*



*CPA License Presentation Ceremony speakers Annette Herrin, MSCPA Chairman; Joseph Rugger, Keynote; and Lydia Windham, MSCPA Young CPA Network President.*



*Christy Renee Thornton of May & Company, LLP receives her CPA license from Willie B. Sims, Jr., Board Chair.*

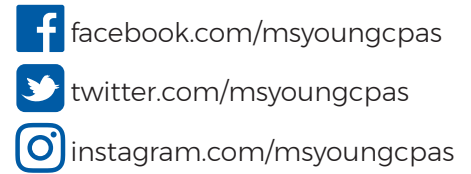


*Legacy CPA Fred M. Sutphen, Jr. of Orsborn, Sutphen, & O'Neal, P.A. receives his CPA license from Willie B. Sims, Jr., Board Chair.*



*Lydia Windham, MSCPA Young CPA Network President; Annette Herrin, MSCPA Chairman; Andy Wright, MSBPA Executive Director; Charlie Prince, MSBPA Board Member; and Karen Moody, MSCPA President/CEO.*





## YCPA Social

The MSCPA Young CPA Network hosted a social at Saltine Restaurant in Jackson on April 25. Thanks to the student members who also attended!



## Volunteer for a YCPA Network Committee

The Young CPA Network is seeking volunteers for their Young CPA Network Communications Committee, Young CPA Network Conference Committee, and Young CPA Network Events Committee for the 2019-2020 year. If you are interested in volunteering on a committee, please email [msyoungcpa@ms-cpa.org](mailto:msyoungcpa@ms-cpa.org) for more information. Committees will meet in July.

# Young CPA Conference

MSCPA officially kicked off “CPE season” Friday, April 26, with our Young CPA Conference, sponsored by Carr Healthcare Realty, C Spire, and Southern AgCredit. Attendees heard from speakers Jan Craig, Derrick Garner, David McClendon, Danny Miller and Joseph Rugger.





# CHAPTERS

## Central Chapter

The MSCPA Central Chapter held their quarterly luncheon April 23 at the MSCPA Training Center in Ridgeland. CPE speakers were Charles Lindsay of Matthews, Cutrer and Lindsay, P.A. and George Hester and Jason Hester of Navitas Wealth Advisors.



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## Southwest Chapter

The MSCPA Southwest Chapter had a meeting and social event on Tuesday, April 30, in Natchez at Callon Petroleum. MSCPA Chairman Annette Herrin and MSCPA President/CEO Karen Moody attended as special guests and provided MSCPA and professional issues updates.





# CHAPTERS

## East Central Chapter

The East Central Chapter had a luncheon meeting on Thursday, May 2, at the Mississippi's Arts + Entertainment Experience in Meridian as nearly 50 attended the kick off of the Chapter reorganization followed by a tour of the MAX. MSCPA Chairman Annette Herrin and President/CEO Karen Moody discussed key issues facing the profession and the Society, while representatives from Citizens National Bank who sponsored the event were on hand to highlight services provided and ways to protect your assets.





# UPCOMING CPE

## COURSE INFORMATION

Acronym: ..... CL4RFGO  
Vendor: ..... AICPA  
Level: ..... Intermediate  
CPE Credit: ..... 4 A&A  
City: ..... Ridgeland  
Location: ..... MSCPA Center  
M / N: ..... \$155 / \$195  
Time: ..... 1:00pm-4:30pm

**6/3/2019** **IN PERSON: Real-World Frauds Found in Governments**  
**Mon** **Speaker: Donna Ingram**

Frauds in governments are as unique as government entities themselves. Through a comprehensive learning approach using examples, explanations of audit standards and informative case studies, learn about real-world government fraud, including cyber fraud, and your responsibilities when dealing with government fraud. This course analyzes several unique frauds which occurred in the government sector. This course may qualify for Yellow Book credit.

Acronym: ..... CL4RFGOW  
Vendor: ..... AICPA  
Level: ..... Intermediate  
CPE Credit: ..... 4 A&A  
Location: ..... Online  
M / N: ..... \$155 / \$195  
Time: ..... 1:00pm-4:30pm



**6/3/2019** **LIVESTREAM: Real-World Frauds Found in Governments**  
**Mon** **Speaker: Donna Ingram**

Frauds in governments are as unique as government entities themselves. Through a comprehensive learning approach using examples, explanations of audit standards and informative case studies, learn about real-world government fraud, including cyber fraud and your responsibilities when dealing with government fraud. This course analyzes several unique frauds which occurred in the government sector. This course may qualify for Yellow Book credit.

Acronym: ..... CL4AUAA  
Vendor: ..... AICPA  
Level: ..... Update  
CPE Credit: ..... 4 A&A  
City: ..... Ridgeland  
Location: ..... MSCPA Center  
M / N: ..... \$155 / \$195  
Time: ..... 8:30am-12:00pm

**6/4/2019** **IN PERSON: Accounting and Auditing Updates**  
**Tues** **Speaker: Brent McClure**

Keep abreast of the fast-paced changes in accounting and auditing. This comprehensive course covers all the relevant pronouncements, exposure drafts, and other guidance recently issued in the accounting and auditing arenas. Let us sort through all of the complexities and help you identify and apply recently issued FASB and ASB standards and guidance. With the rate of change in today's regulatory environment, you must stay current on all of the topics impacting the profession – don't get left behind!

Acronym: ..... CL4AUAAW  
Vendor: ..... AICPA  
Level: ..... Update  
CPE Credit: ..... 4 A&A  
Location: ..... Online  
M / N: ..... \$155 / \$195  
Time: ..... 8:30am-12:00pm



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**Tues** **Speaker: Brent McClure**

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Acronym: ..... CL4COMP  
Vendor: ..... AICPA  
Level: ..... Update  
CPE Credit: ..... 4 A&A  
City: ..... Ridgeland  
Location: ..... MSCPA Center  
M / N: ..... \$155 / \$195  
Time: ..... 1:00pm-4:30pm

**6/4/2019** **IN PERSON: Preparation, Compilation, and Review**  
**Tues** **Engagements: Update and Review**  
**Speaker: Brent McClure**

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.

Acronym: ..... CL4COMPW  
Vendor: ..... AICPA  
Level: ..... Update  
CPE Credit: ..... 4 A&A  
Location: ..... Online  
M / N: ..... \$155 / \$195  
Time: ..... 1:00pm-4:30pm



**6/4/2019** **LIVESTREAM: Preparation, Compilation, and Review**  
**Tues** **Engagements: Update and Review**  
**Speaker: Brent McClure**

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.

Acronym: ..... CL4SKSB  
Vendor: ..... AICPA  
Level: ..... Update  
CPE Credit: ..... 4 A&A  
City: ..... Ridgeland  
Location: ..... MSCPA Center  
M / N: ..... \$155 / \$195  
Time: ..... 8:30am-12:00pm

**6/5/2019** **IN PERSON: Controller's Update: Today's Latest Trends**  
**Wed** **Speaker: Brent McClure**

Strengthen your abilities as a controller and help your management team understand current economic issues through the latest trends in accounting, finance, human resources, treasury management, and business systems. In this course you will discuss leading-edge topics in managerial accounting and finance in a session that is packed with useful tips and practical guidance that you can apply immediately.

Acronym: ..... CL4SKSBW  
 Vendor: ..... AICPA  
 Level: ..... Update  
 CPE Credit: ..... 4 A&A  
 Location: ..... Online  
 M / N: ..... \$155 / \$195  
 Time: ..... 8:30am-12:00pm



**6/5/2019  
Wed**

**LIVESTREAM: Controller's Update: Today's Latest Trends  
Speaker: Brent McClure**

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Acronym: ..... CL4DYDM  
 Vendor: ..... AICPA  
 Level: ..... Basic  
 CPE Credit: ..... 4 Gen  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$155 / \$195  
 Time: ..... 1:00pm-4:30pm

**6/5/2019  
Wed**

**IN PERSON: Developing Your Digital Mindset  
Speaker: Brent McClure**

The accounting and finance profession is seeing seismic change because of new technologies, which are developing and launching ahead of the profession's ability and willingness to adapt to them and take advantage of its benefits. Digital mindsets are reported to be one of the key barriers in the initial adoption of technology, its full use, and exploiting the opportunity it presents. Many early adopters are still experimenting but most of the market are in the late-majority category of adopters. This course will explain what it means to develop a digital mindset, including concepts related to agility, constant learning, thriving in ambiguity, curiosity, and innovation. Through tangible examples, this course will help participants gain knowledge about the competencies needed to thrive in today's disruptive world, enhance employability, accelerate company performance, and manage the accelerating and relentless pace of change.

Acronym: ..... CL4DYDMW  
 Vendor: ..... AICPA  
 Level: ..... Update  
 CPE Credit: ..... 4 Gen  
 Location: ..... Online  
 M / N: ..... \$155 / \$195  
 Time: ..... 1:00pm-4:30pm



**6/5/2019  
Wed**

**LIVESTREAM: Developing Your Digital Mindset  
Speaker: Brent McClure**

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Acronym: ..... CL4PTRM1  
 Vendor: ..... AICPA  
 Level: ..... Intermediate  
 CPE Credit: ..... 4 Tax  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$155 / \$195  
 Time: ..... 8:30am-12:00pm

**6/6/2019  
Thurs**

**Reviewing Partnership Tax Returns: What Are You Missing?  
Speaker: William F. (Bill) Taylor**

Join us as we discuss the common errors practitioners make on partnership 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 income, deductions, K-1 reporting, and more! Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law. This course follows a highly illustrative case study format to increase participant comprehension and retention.

Acronym: ..... CL4ITRM1  
 Vendor: ..... AICPA  
 Level: ..... Intermediate  
 CPE Credit: ..... 4 Tax  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$155 / \$195  
 Time: ..... 1:00pm-4:30pm

**6/6/2019  
Thurs**

**Reviewing Individual Tax Returns: What Are You Missing?  
Speaker: William F. (Bill) Taylor**

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! Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law. This course follows a highly illustrative case study format to increase participant comprehension and retention.

## COURSE INFORMATION CONTINUED

Acronym: ..... CL4CYCT  
 Vendor: ..... AICPA  
 Level: ..... Intermediate  
 CPE Credit: ..... 4 Tax  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$155 / \$195  
 Time: ..... 8:30am-12:00pm

**6/7/2019 IN PERSON: Smart Tax Planning Strategies for Individuals**  
**Fri Speaker: William F. (Bill) Taylor**

Make sure your clients are protecting themselves from higher taxes. Get the latest techniques for building and conserving wealth through proactive tax-planning and investment strategies. Completely updated for tax law changes, this course will bring you up-to-date on the latest strategies which will keep more money in the hands of your clients and ensure your place as trusted advisor. Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law.

Acronym: ..... CL4CYCTW  
 Vendor: ..... AICPA  
 Level: ..... Intermediate  
 CPE Credit: ..... 4 Tax  
 Location: ..... Online  
 M / N: ..... \$155 / \$195  
 Time: ..... 8:30am-12:00pm



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**Fri Speaker: William F. (Bill) Taylor**

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Acronym: ..... CL4SSM  
 Vendor: ..... AICPA  
 Level: ..... Intermediate  
 CPE Credit: ..... 4 Tax  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$155 / \$195  
 Time: ..... 1:00pm-4:30pm

**6/7/2019 IN PERSON: Social Security and Medicare: Maximizing**  
**Fri Retirement Benefits Speaker: William F. (Bill) Taylor**

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.

Acronym: ..... CL4SSMW  
 Vendor: ..... AICPA  
 Level: ..... Intermediate  
 CPE Credit: ..... 4 Tax  
 Location: ..... Online  
 M / N: ..... \$155 / \$195  
 Time: ..... 1:00pm-4:30pm



**6/7/2019 LIVESTREAM: Social Security and Medicare: Maximizing**  
**Fri Retirement Benefits Speaker: William F. (Bill) Taylor**

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Acronym: ..... SEAZ  
 Vendor: ..... Surgent  
 Level: ..... Basic  
 CPE Credit: ..... 8 Tax  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$275 / \$345  
 Time: ..... 8:30am-4:30pm

**6/10/2019 IN PERSON: How to Settle a Client's Estate**  
**Mon Speaker: Scott Emerson**

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

Acronym: ..... SEAZW  
 Vendor: ..... Surgent  
 Level: ..... Basic  
 CPE Credit: ..... 8 Tax  
 Location: ..... Online  
 M / N: ..... \$275 / \$345  
 Time: ..... 8:30am-4:30pm



**6/10/2019 LIVESTREAM: How to Settle a Client's Estate**  
**Mon Speaker: Scott Emerson**

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Acronym: ..... MFEP  
 Vendor: ..... Surgent  
 Level: ..... Basic  
 CPE Credit: ..... 8 Tax  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$275 / \$345  
 Time: ..... 8:30am-4:30pm

**6/11/2019 Mastering the Fundamentals of Estate and Gift Tax**  
**Tues Speaker: Scott Emerson**

While estate and gift taxes have been greatly relaxed, many clients will still require estate planning services in the current year. This course examines the fundamentals of estate planning including critical concepts in marital deduction planning, credit shelter trusts, selection and powers of trustees, and titling and funding issues. The comprehensive manual provides an in-depth analysis of will provisions, checklists, flow charts, and real-life examples.

Acronym: ..... ERR-5  
 Vendor: ..... MSCPA  
 Level: ..... Update  
 CPE Credit: ..... 4 Ethics  
 City: ..... Tupelo  
 Location: ..... BancorpSouth Conf. Ctr.  
 M / N: ..... \$155 / \$195  
 Time: ..... 8:30am-12:00pm

**6/12/2019 Ethics, Rules, and Regulations**  
**Wed Speaker: Donna Ingram**

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

Acronym: ..... QBT4-2  
 Vendor: ..... MSCPA  
 Level: ..... Intermediate  
 CPE Credit: ..... 4 A&A  
 City: ..... Tupelo  
 Location: ..... BancorpSouth Conf. Ctr.  
 M / N: ..... \$155 / \$195  
 Time: ..... 1:00pm-4:30pm

**6/12/2019 Fraud: The Quest for Buried Treasures**  
**Wed Speaker: Donna Ingram**

People bury money and other assets in mattresses, foreign bank accounts and even tree trunks. In this presentation we will discuss methods fraudsters use to hide assets and tips on finding them, along with analyzing true cases to follow the trail that led to the discovery of the treasures buried.

Acronym: ..... GNAU  
 Vendor: ..... AICPA  
 Level: ..... Update  
 CPE Credit: ..... 8 A&A  
 City: ..... Tupelo  
 Location: ..... BancorpSouth Conf. Ctr.  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**6/12/2019 Governmental and Not-for-Profit Update**  
**Wed Speaker: Michele Kemp**

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. This course may qualify for Yellow Book credit.

Acronym: ..... INRR  
 Vendor: ..... AICPA  
 Level: ..... Intermediate  
 CPE Credit: ..... 8 A&A  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**6/12/2019 Revenue Recognition: Mastering the New FASB Requirements**  
**Wed Speaker: Daryl Krause**

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.

Acronym: ..... MSTU-2  
 Vendor: ..... Surgent  
 Level: ..... Update  
 CPE Credit: ..... 8 Tax  
 City: ..... Tupelo  
 Location: ..... BancorpSouth Conf. Ctr.  
 M / N: ..... \$275 / \$345  
 Time: ..... 8:30am-4:30pm

**6/13/2019 Multistate Tax Update**  
**Thurs Speaker: Michael Frost**

With the largest overhaul of the federal income tax code in 30 years and the repeal of the physical presence nexus standards for sales tax in the Wayfair case the states are working fast and furious to overhaul their tax laws. As some states scramble to fund their budgets, they continue to look for additional forms of revenue. You can't afford to ignore recent changes in state and local tax. Even tax-savvy businesses and their advisers often neglect to consider the consequences of state and local taxes. Multistate taxation is more complex and demanding than ever before. In addition to having their own unique tax laws, states have been more focused on enforcement. Plan to attend this fast-paced class that covers developing topics in state taxation, ranging from individuals to pass-through entities to corporate taxpayers. This class will focus on issues of small and middle-market companies and offer guidance for minimizing tax liability and negotiating the treacherous waters of compliance.

## COURSE INFORMATION CONTINUED

Acronym: ..... SMBZ-1  
 Vendor: ..... AICPA  
 Level: ..... Update  
 CPE Credit: ..... 8 A&A  
 City: ..... Tupelo  
 Location: ..... BancorpSouth Conf. Ctr.  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**6/13/2019 Accounting and Auditing Update for Small Businesses**  
**Thurs Speaker: Michele Kemp**

Geared toward practitioners who provide accounting and auditing services to small businesses, this course updates you on the new accounting, auditing, compilation and review standards, and other professional guidance that impact small businesses and their auditors. Materials include practical applications of the topics covered to help you understand and apply the standards to real-life scenarios. With the rate of change in today's regulatory environment, you must stay current on all of the topics impacting the profession. Your clients are counting on you!

Acronym: ..... CORU-1  
 Vendor: ..... AICPA  
 Level: ..... Update  
 CPE Credit: ..... 8 A&A  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**6/13/2019 Annual Update and Practice Issues for Preparation,**  
**Thurs Compilation, and Review Engagements**  
**Speaker: Daryl Krause**

A go-to reference for training staff and managing your preparation, compilation, and review engagements, this course will enable you to be in compliance with all of the professional standards surrounding engagements performed in accordance with Statements on Standards for Accounting and Review Services (SSARs). A practice-oriented review of the latest developments, cases, and lively discussion among the experienced participants make this class informative and practical.

Acronym: ..... SCRT-2  
 Vendor: ..... Surgent  
 Level: ..... Intermediate  
 CPE Credit: ..... 8 Tax  
 City: ..... Tupelo  
 Location: ..... BancorpSouth Conf. Ctr.  
 M / N: ..... \$275 / \$345  
 Time: ..... 8:30am-4:30pm

**6/14/2019 Securing a Comfortable Retirement in the Age of Spending**  
**Fri Speaker: Michael Frost**

This course gives CPAs the knowledge to help their clients plan for retirement by evaluating how much retirement income they will require and planning for how to reach their retirement goals.

Acronym: ..... SKSB  
 Vendor: ..... AICPA  
 Level: ..... Update  
 CPE Credit: ..... 8 A&A  
 City: ..... Tupelo  
 Location: ..... BancorpSouth Conf. Ctr.  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**6/14/2019 Annual Update for Controllers**  
**Fri Speaker: Michele Kemp**

Strengthen your abilities as a controller and help your management team understand current economic issues through the latest trends in accounting, finance, human resources, treasury management, and business systems. In this course you will discuss leading-edge topics in managerial accounting and finance in a session that is packed with useful tips and practical guidance that you can apply immediately.

Acronym: ..... LEAS  
 Vendor: ..... AICPA  
 Level: ..... Intermediate  
 CPE Credit: ..... 8 A&A  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**6/14/2019 Leases: Mastering the New FASB Requirements**  
**Fri Speaker: Daryl Krause**

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 with journal entries 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. In addition, this course addresses the business context of implementing the new standard by identifying key factors for managing this significant change.

Acronym: ..... ICRS  
 Vendor: ..... Phoenix Beach  
 Level: ..... Intermediate  
 CPE Credit: ..... 8 A&A  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$275 / \$345  
 Time: ..... 8:30am-4:30pm

**6/17/2019 Internal Control Development That Balances Risk with Strategy**  
**Mon Speaker: Karl Egnatoff**

This session uses the updated The COSO Enterprise Risk Management Framework as well as other authoritative sources to explore how organizations of all size and type can drive the entity in a desired direction while keeping an eye on the risks associated with undertaking or not undertaking a business activity. This material is becoming more and more beneficial as companies strive to address the many new business challenges such as evolving markets, the rapid rate of change in the business world and the notable increase in regulation standards. This material is taught using ideas set forth by authoritative bodies as well as with case examples to help participants conceptualize the content. Those that work with internal controls and regularly consider risk management, should strongly consider this session.

Acronym: ..... IEFB  
 Vendor: ..... Phoenix Beach  
 Level: ..... Intermediate  
 CPE Credit: ..... 8 A&A  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$275 / \$345  
 Time: ..... 8:30am-4:30pm

**6/18/2019 Internal and External Fraud: Understanding It and  
 Tues Working to Control It  
 Speaker: Karl Egnatoff**

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.

Acronym: ..... EDKW  
 Vendor: ..... Phoenix Beach  
 Level: ..... Basic  
 CPE Credit: ..... 8 Gen  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$275 / \$345  
 Time: ..... 8:30am-4:30pm

**6/19/2019 Microsoft Excel: You Don't Know What You Don't Know  
 Wed Speaker: Karl Egnatoff**

Many Excel users have received little or no formal training to help them use the ubiquitous productivity application. This session can help users that wish to improve their Excel skills to increase their productivity. The material starts by covering basic topics such as time saving tips and keyboard shortcuts and then moves to more advanced areas like conditional formatting and complex formula building. Users that find themselves looking at the spreadsheets that others design and wishing they could do as much with Excel will benefit greatly by taking this course.

Acronym: ..... STSB  
 Vendor: ..... AICPA  
 Level: ..... Intermediate  
 CPE Credit: ..... 8 Tax  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**6/20/2019 Slashing Taxes for Your Small Business Clients:  
 Thurs Corporations, Partnerships, & LLCs  
 Speaker: Peter Towle**

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. Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law.

Acronym: ..... NXUP  
 Vendor: ..... AICPA  
 Level: ..... Intermediate  
 CPE Credit: ..... 8 Tax  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**6/21/2019 Nexus Update: Latest Developments in State Income,  
 Fri Franchise, and Sales Taxes  
 Speaker: Peter Towle**

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. Course materials will include the latest developments regarding the Wayfair decision.

Acronym: ..... SMBZ-2  
 Vendor: ..... AICPA  
 Level: ..... Intermediate  
 CPE Credit: ..... 8 A&A  
 City: ..... Ridgeland  
 Location: ..... Holmes CC  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**6/24/2019 Accounting and Auditing Update for Small Businesses  
 Mon Speaker: Eugene Ristaino**

Geared toward practitioners who provide accounting and auditing services to small businesses, this course updates you on the new accounting, auditing, compilation and review standards, and other professional guidance that impact small businesses and their auditors. Materials include practical applications of the topics covered to help you understand and apply the standards to real-life scenarios. With the rate of change in today's regulatory environment, you must stay current on all of the topics impacting the profession. Your clients are counting on you!

Acronym: ..... BADI  
 Vendor: ..... AICPA  
 Level: ..... Intermediate  
 CPE Credit: ..... 8 Tax  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**6/24/2019 Basis/Distributions for Pass-Through Entities: Simplifying the  
 Mon Complexities  
 Speaker: Arthur Auerbach**

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.



## COURSE INFORMATION CONTINUED

Acronym: .....CCAI  
 Vendor: .....AICPA  
 Level: .....Intermediate  
 CPE Credit: .....6 A&A / 2 Tax  
 City: .....Ridgeland  
 Location: .....MSCPA Center  
 M / N: .....\$275 / \$345  
 AICPA Member Discount: .....\$30  
 Time: .....8:30am-4:30pm



**6/25/2019 IN PERSON: Construction Contractors Advanced Issues**  
**Tues Speaker: Andrew Copeland**

The construction industry comes with many advanced accounting issues, audit procedures, and tax issues, which makes construction contractor engagements inherently higher risk than other engagements. As a result, practitioners and financial professionals should be prepared to address difficult issues such as look-back calculations, measuring progress of contracts, overhead allocations, and internal controls for construction contractors. Learn about some of the most pervasive issues in the construction industry and how to identify and manage the risks inherent with construction contractor engagements.

Acronym: .....CCAIW  
 Vendor: .....AICPA  
 Level: .....Intermediate  
 CPE Credit: .....6 A&A / 2 Tax  
 Location: .....Online  
 M / N: .....\$275 / \$345  
 AICPA Member Discount: .....\$30  
 Time: .....8:30am-4:30pm



**6/25/2019 LIVESTREAM: Construction Contractors Advanced Issues**  
**Tues Speaker: Andrew Copeland**

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Acronym: .....HTOF  
 Vendor: .....Surgent  
 Level: .....Basic  
 CPE Credit: .....5 Gen / 3 Tax  
 City: .....Ridgeland  
 Location: .....Holmes CC  
 M / N: .....\$275 / \$345  
 Time: .....8:30am-4:30pm

**6/25/2019 Employers Handbook: Legal, Tax, and Health Care Issues**  
**Tues Speaker: William F. (Bill) Taylor**

The employer-employee relationship strains both sides in uncertain times, and businesses need CPAs, controllers, and other advisors to provide understanding of the complex legal, tax, and health care issues associated with all aspects of employment, especially now. This course provides in-depth coverage of this critical area and is updated and supplemented throughout the year for breaking developments.

Acronym: .....TGNP  
 Vendor: .....AICPA  
 Level: .....Update  
 CPE Credit: .....8 A&A  
 City: .....Ridgeland  
 Location: .....Holmes CC  
 M / N: .....\$275 / \$345  
 AICPA Member Discount: .....\$30  
 Time: .....8:30am-4:30pm



**6/26/2019 Annual Update: Top Governmental and Not-for-Profit**  
**Wed Accounting and Auditing Issues Facing CPAs**  
**Speaker: John Georger, Jr.**

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. This course may qualify for Yellow Book credit.

Acronym: .....CGPT  
 Vendor: .....Surgent  
 Level: .....Basic  
 CPE Credit: .....8 Tax  
 City: .....Ridgeland  
 Location: .....MSCPA Center  
 M / N: .....\$275 / \$345  
 Time: .....8:30am-4:30pm

**6/26/2019 IN PERSON: The Complete Guide to Payroll Taxes and 1099 Issues**  
**Wed Speaker: William F. (Bill) Taylor**

Employment taxes are often overlooked as an area where more planning may be effective. Payroll taxes have become an increasing burden for the average business and IRS penalties for noncompliance have risen dramatically in recent years. They have also been subject to employer incentives. The Service has announced that uncovering noncompliance by employers ranks high on its audit list. This course presents a comprehensive overview of federal payroll taxes, Form 1099, and related compliance issues.

Acronym: .....CGPTW  
 Vendor: .....Surgent  
 Level: .....Basic  
 CPE Credit: .....8 Tax  
 Location: .....Online  
 M / N: .....\$275 / \$345  
 Time: .....8:30am-4:30pm



**6/26/2019 LIVESTREAM: The Complete Guide to Payroll Taxes and**  
**Wed 1099 Issues**  
**Speaker: William F. (Bill) Taylor**

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Acronym: ..... EL  
 Vendor: ..... Executive Ed  
 Level: ..... Intermediate  
 CPE Credit: ..... 4 Ethics  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$160 / \$200  
 Time: ..... 8:30am-12:00pm

**6/27/2019 Ethical Leadership for Mississippi CPAs**  
**Thurs Speaker: Don Minges**

Obtain your specialized state ethics requirement in this entertaining and insightful seminar. Reap enormous payback in all aspects of doing business by building and maintaining trust and integrity. Learn the risks and consequences of misusing power. This seminar satisfies the State Board's requirement for three hours of general ethics and one hour of Mississippi Rules and Regulations.

Acronym: ..... VAB  
 Vendor: ..... Executive Ed  
 Level: ..... Intermediate  
 CPE Credit: ..... 4 A&A  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$160 / \$200  
 Time: ..... 1:00pm-4:30pm

**6/27/2019 Valuing a Business: What is This Company Worth?**  
**Thurs Speaker: Don Minges**

What is your company worth? Is business value the single most important metric? Discuss various business valuation methods for any stage company: start-up, spin-off, or acquisition. Determine which valuation method is right for your situation. CPAs and Corporate Financial Managers cannot afford to miss this course.

Acronym: ..... YBRV  
 Vendor: ..... AICPA  
 Level: ..... Basic  
 CPE Credit: ..... 8 A&A  
 City: ..... Ridgeland  
 Location: ..... Holmes CC  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**6/27/2019 The New Yellow Book: Government Auditing Standards, 2018**  
**Thurs Revision Speaker: John Georger, Jr.**

Do you want to learn about the 2018 revision to Government Auditing Standards (GAGAS or GAS or the "Yellow Book")? This course is based on Government Auditing Standards, 2018 Revision, which is effective for financial audits of fiscal years ending on or after June 30, 2020. It provides an excellent baseline of information for accountants as it relates to understanding the guidance in the new Yellow Book. It also provides detailed information regarding auditor independence as found in Government Auditing Standards, 2018 Revision. It is essential that all auditors planning and conducting engagements in accordance with the new Yellow Book understand and be able to discern the requirements related to independence as found in Government Auditing Standards, 2018 Revision because those independence standards are effective for fiscal years beginning July 1, 2019. This course may qualify for Yellow Book credit.

Acronym: ..... CFOS5  
 Vendor: ..... Executive Ed  
 Level: ..... Intermediate  
 CPE Credit: ..... 8 A&A  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$285 / \$355  
 Time: ..... 8:30am-4:30pm

**6/28/2019 CFO Series: Balance Sheet Management**  
**Fri Speaker: Don Minges**

Executive Education's CFO Series provides a convenient, one-stop way for CFOs and those who aspire to be CFOs, to choose 40 credit hours of CPE with a single decision. The CFO Series consists of 20, two-hour topics presented by 3 different financial management veterans. Each topic and each day stands on its own. If you are not sure about making a five-day commitment, sign up for just a single day. We think you will come back for more! Topics for this 8-hour CFO Series course include Balance Sheet Management, The Cost of Capital: Why You Should Use It, Debt versus Equity: Which Will Your Organization Need Next?, and Build Your Personal Net Worth.

Acronym: ..... INUG  
 Vendor: ..... AICPA  
 Level: ..... Intermediate  
 CPE Credit: ..... 8 A&A  
 City: ..... Ridgeland  
 Location: ..... Holmes CC  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**6/28/2019 Applying the Uniform Guidance in Your Single Audits**  
**Fri Speaker: John Georger, Jr.**

Does a single audit have you running in circles? This course provides you with the knowledge to be more efficient and effective at planning and performing audits in accordance with the requirements of the Uniform Guidance and the Single Audit Act. Make sure your skills are up-to-date with the latest information in this challenging audit area. This course may qualify for Yellow Book credit.

Acronym: ..... GAAC  
 Vendor: ..... MSCPA  
 Level: ..... Update  
 CPE Credit: ..... 16 A&A  
 City: ..... Jackson  
 Location: ..... Hilton-Jackson  
 M / N: ..... \$295 / \$395  
 Time: ..... 8:30am-4:30pm

**8/15-8/16/19 Governmental Accounting and Auditing Conference**  
**Thurs-Fri Speaker: Various**

This two-day event for government accountants will provide the crucial guidance you need to stay in compliance with the many A&A rules affecting your practice, business or clients. Visit the MSCPA website at [www.ms-cpa.org](http://www.ms-cpa.org) for a complete conference agenda. This course may qualify for Yellow Book credit.

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- NE MS Tax/Bookkeeping - \$850k – SOLD

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**CLOUD ACCOUNTANT** – CPA in Ocean Springs MS has an opening for a Cloud Accountant, who will be responsible for keeping our clients' financial records up to date. The cloud accountant will research and present accounting, business, management applications, and business processes to internal and external clients. The role requires someone who is a natural with learning new technology and can efficiently and accurately manage multiple clients. Having these skills is a real plus:

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- CPA energized and open minded to promote developments in the delivery of online accounting services
- Experience with cloud accounting tools like

Xero, Hubdoc, LivePlan, Workflowmax, Malartu, Practice Ignition, Mytaxoffice

- Income tax preparation experience
- Payroll and sales tax experience

Interested candidates should submit a cover letter and resume via email to [gulfcoastapplications@gmail.com](mailto:gulfcoastapplications@gmail.com).

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**SEEKING TAX MANAGER** – The Burgess Group, PA, a Flowood CPA firm, is seeking a career-oriented team member with extensive income tax experience. Tax manager level is preferred. Candidates must be able to prepare and review complicated tax returns for individuals and businesses. Potential for ownership in the firm will be available in the foreseeable future for the right person. Our firm offers a relaxed work environment with scheduling flexibility to handle employee family and personal obligations. We value our families at The Burgess Group, PA. Resumes may be sent confidentially to Beth Burgess, President at [bburgess@burgessgroup.net](mailto:bburgess@burgessgroup.net).