



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 2021-2022. See pages 10-11 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 26, 2021 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 no later than June 21 (five days prior to the Annual Meeting on June 26).

Register Now for Convention So We Can Finish Planning and Finalizing Layouts for Safe Meeting Practices!

Join other MSCPA members in Destin, June 23-27!

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.

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. We've also added a free 5K Fun Run this year on Saturday morning. 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 6th 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 to sign your team 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 to download the brochure for a detailed agenda and for more information about our speakers and special entertainment. Brochures were mailed in May. You can register online or download a printable registration form to register by fax or mail.

IN MEMORIAM

EDWARD Y. JOE, SR.
Ridgeland

Died April 23, 2021



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Pearl

EDWARD Y. JOE, SR.
Ridgeland
By
JIM KOERBER
Hattiesburg

TIMOTHY W. (TIM) MARTIN
Ridgeland
By
RONALD E. RUSSELL
Jackson



REGISTER NOW!

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ANNUAL CONVENTION
June 23-27, 2021
Sandestin



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Opinions expressed are not necessarily the official policy of the MSCPA. Advertising is accepted in good faith that the product/services are of value stated.

Welcome New Members

ADEWALE AKANJI
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AMY M. DEER
Morgan-White Group, Inc.
Madison

JOHANNA DOOM
Harper, Rains, Knight & Company
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Bailey

AMY L. PULLENS
The USM Foundation
Braxton

NEWTON RILEY
Silas Simmons, LLP
Natchez

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KPMG LLP
Madison

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HEATH WALT
HORNE LLP
Brandon

PAYTON C. WATTS
Haddox Reid Eubank Betts
Clinton

Member News

Moody Earns Fellowship Designation from the Healthcare Financial Management Association

HORNE has announced that HORNE Healthcare Partner Kade Moody, CPA, CHFP, recently became a Fellow of the Healthcare Financial Management Association (HFHMA).

To be awarded the HFHMA distinction, applicants must be credentialed as a Certified Healthcare Financial Professional (CHFP); be an HFMA member for at least five years; complete a bachelor's degree or 120 semester hours from an accredited college or university; and volunteer in HFMA or the healthcare industry. More than 1,700 HFMA members nationwide have achieved this accomplishment in the organization's 68-year history.

"We congratulate Kade on being named a Fellow of the HFMA and are thrilled that his expertise and leadership in healthcare finance is being recognized by this prestigious organization," said HORNE Healthcare Managing Partner Kathy Watts.





MEET OUR MEMBERS

Legacy Spotlights

As a tribute to the 100th Anniversary of the MSCPA, we want to spotlight members during our year-long Centennial Celebration who are legacies of the profession – MSCPA members whose family is or was also a MSCPA member CPA, accountant, or accounting student. Our celebration is coming to a close and this feature is only planned for one more issue! If you or someone you know is a legacy of the profession, please email names and contact information to jtrubett@ms-cpa.org.

Charles Wesley Caldwell, Sr.

A native of Oxford, Wesley enrolled in the University of Mississippi and attended there until his studies were interrupted by military service during World War II. In 1942, Wesley enlisted for military service and was assigned to active duty with the 106th Infantry Division of the United States Army. His military service took him throughout England, France, and Belgium to the front lines of the Western Front of the European Theatre. There, he was captured by German forces in the Battle of the Bulge. From there he was transported to a prisoner of war camp in Germany where he remained until the end of the war.

Upon his return to the United States, Wesley completed his education at the University of Mississippi, earning his degree with a major in Accounting. In 1947 he moved to Natchez, joining Silas M. Simmons and Company. Mr. Caldwell, one of the original partners of the firm, practiced there until his retirement in 1992.

In 1950, Wesley received the gold medal award from the MSCPA for achieving the highest grade on the CPA examination. He was awarded 50 year Honorary Membership in the AICPA in 2001. In 2004 he was inducted into the University of Mississippi Accountancy Hall of Fame, and in 2007 established an endowment through the University of Mississippi Foundation to provide scholarship opportunities for area accountancy students.

Wesley served the MSCPA as Treasurer and chaired the Services to Members Committee for a number of years. He also served on various other committees and was the 1962-63 President of the MSCPA Southwest Chapter. He was asked to run for President multiple times, but he declined because he “did not like being in the spotlight.”

He was a member of Jefferson Street United Methodist Church and the E.C.

Ward Sunday School Class. He was a Legion of Honor Member of the Natchez Kiwanis Club, having been a member for over fifty years. He was also honored as a Rotary Paul Harris Fellow.

Wesley and his wife, Marian, had one son, Charles “Chuck” Wesley Caldwell, Jr., and one daughter, Kathy Caldwell Phillips.

Charles “Chuck” Wesley Caldwell, Jr.

Chuck joined his father’s firm immediately upon graduation from Ole Miss in 1976 and passed the CPA Exam the same year. Since 2006, he has also held the AICPA’s Personal Financial Specialist designation. He became a partner in the firm of Silas Simmons LLP in 1984 and was managing partner from 2000 to 2016.

Chuck was the 1993-94 Society President. Before becoming President, Caldwell served the MSCPA as Treasurer and as a member of the Southwest Chapter. He has served on and chaired various committees over the years. During Caldwell’s term as President, Jack Coppenbarger was named as the Associate Executive Director in a transition plan to Bob Nickey’s retirement. Additionally, Chuck later served on the special committee to interview and make recommendations to the Board of Governors that led to the selection in 2015 of Karen Moody to replace Coppenbarger. Thus, he has had an integral role in the hiring of two of the last three heads of the Society. Also, Chuck’s convention in Sandestin was designed as a move to a more “casual” convention. The convention brochure for 1994 had a “no tie” emblem to promote the casual nature of the convention. That innovation has lasted to the present day. He also introduced a night off for families and members to enjoy time together and a cookout by the pool. Chuck has stayed active since his presidency, often dealing with the nitty-gritty details of the organization, such



as multiple revisions of the bylaws, and the development of the Society’s vision statement and strategic plan.

In terms of civic contributions, Caldwell is a member of the Advisory Board of the Patterson School of Accountancy at Ole Miss. He has served as President of the Rotary Club of Natchez and the Historic Natchez Foundation, as well as the Chamber of Commerce of Natchez-Adams County. He is a member of the Jefferson Street United Methodist Church and the Natchez Historical Society. As an active amateur historian, Chuck has been an advisor to the coauthors of this volume.

Collectively, Wesley and Chuck have enjoyed 90 years of service to their clients, their firm, the MSCPA, and the profession.

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Form **4868** **Application for Automatic Extension of Time To**
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 Department of the Treasury Internal Revenue Service (99) For calendar year 2020, or other tax year beginning , 2020, and ending , 20 **2020**

Part I	Part II Individual Income Tax
1 Your name <i>Jessie</i>	4 Estimate of total tax liability for 2020. . . \$
Address <i>26742</i>	5 Total 2020 payments
City, town, or county <i>Mississippi</i>	6 Balance due. Subtract line 5 from line 4 (see instructions)
State <i>MS</i>	7 Amount you're paying (see instructions) . . ▶
ZIP code <i>39056</i>	8 Check here if you're "out of the country" and a U.S. citizen or resident (see instructions) <input type="checkbox"/>
2 Your social security number <i>354-79</i>	9 Check here if you file Form 1040NR or 1040NR-EZ and didn't receive wages as an employee subject to U.S. income tax withholding <input type="checkbox"/>

For Privacy Act Notice, see page 4. Cat. No. 13141W Form **4868** (2020)

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MSCPA CENTENNIAL HISTORY BOOKS DISTRIBUTION CONTINUES

President/CEO Karen Moody delivered history books in Hattiesburg and Ridgeland.

If you have not received a history book, you can stop by the MSCPA office to pick up a copy or request a book to be mailed by contacting Noma Gillis at ngillis@ms-cpa.org. Take a photo with the book and send them to Jennie Truhett at jtruhett@ms-cpa.org to be included in the Newsletter.



2017 and 2018 MSCPA Outstanding Educators, Rick Bedwell—Jones College and Gwen Pate—University of Southern Mississippi



HORNE LLP Executive Partner, Joey Havens

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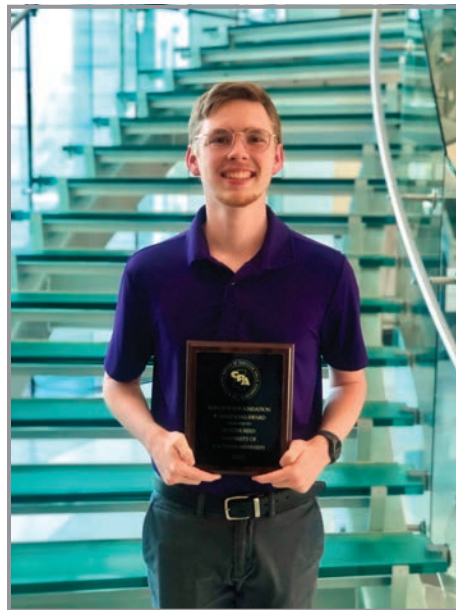
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MSCPA Honors HAMP KING AWARD WINNER

Hunter Reed of the University of Southern Mississippi was honored at the Spring 2021 School of Accountancy Advisory Board meeting for his selection as the Hamp King Award scholarship winner. Reed was awarded an additional \$1,000 scholarship from the MSCPA and a plaque from the MSCPA Education Foundation. One scholarship winner from among all MSCPA undergraduate scholarship recipients is selected each

fall based on outstanding academic and collegiate leadership. The award was named to honor the long-time service of the late Hamp King as Mississippi's State Auditor. Pictured with Reed are MSCPA members, Dr. Marv Bouillon, Director of the School of Accountancy; Julia Bradley, Instructor; Karen Moody, MSCPA President/CEO; Amber Hatten, Professor of Practice and Director of MPA Program; and Gwen Pate, Director Emeritus.



Deloitte Gives Contribution to MSCPA for DE&I Efforts

In continuation of their support of state CPA societies, Deloitte gave a one-time contribution of \$5,000 to the MSCPA earmarked for Diversity, Equity, and Inclusion (DE&I). These earmarked funds can be used for scholarships for diverse candidates, outreach programs, underwriting CPA exam prep materials, etc. The funds must be used for DE&I efforts though the Society can determine the best way to use the contribution for their current or planned initiatives and efforts. At the May meeting, the Board of Governors established a DE&I Task Force to establish procedures and recommendations for an outreach program.

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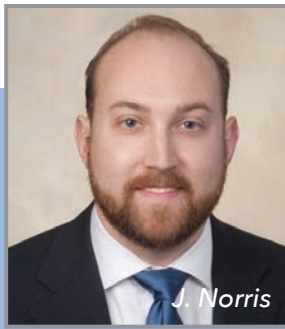
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J. Norris

Board Nominates Norris 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 Josh Norris of Jackson. Other trustees of the Foundation are Stacy Thomas of Jackson and Mark Wilder of Oxford.

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. MSCPA awarded each recipient a plaque and a name plate to be displayed at their college or university. The 2021 recipients are:

BELHAVEN UNIVERSITY
Thomas Carlock

DELTA STATE UNIVERSITY
Ashley Vickers

JACKSON STATE UNIVERSITY
Alyssa Benton

MILLSAPS COLLEGE
Abby Tew

MISSISSIPPI COLLEGE
Hallie Westbrook

MISSISSIPPI STATE UNIVERSITY
Khyler Branae Cain

**MISSISSIPPI UNIVERSITY
FOR WOMEN**
Samprada Chapagain

**MISSISSIPPI VALLEY
STATE UNIVERSITY**
Brandon Alexander

UNIVERSITY OF MISSISSIPPI
Patrick Walter Poe

**UNIVERSITY OF
SOUTHERN MISSISSIPPI**
Thanhmai Huynh

WILLIAM CAREY UNIVERSITY
Kaitlyn Gory



Christy Hudson
CBI
Broker

Kathy Brents
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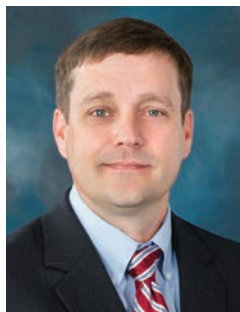
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2021-2022 MEET THE CANDIDATES

The election is scheduled for Saturday, June 26, 2021 during the Annual Business Meeting at Sandestin Golf and Beach Resort in Destin, Florida. Absentee ballots for members who will be unable to attend the Business Meeting are available upon request.

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

CHAIRMAN



Ricky Bullock, Tupelo

RICHARD D. "RICKY" BULLOCK is a Shareholder with Nail McKinney Professional Association in Tupelo where he serves as the Firm's President. With twenty-three 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 the Assistant Treasurer and Finance Committee member. He and his wife, Carrie, have one daughter, Jill.

VICE-CHAIRMAN/CHAIRMAN-ELECT



Scott Christian, Natchez

J. SCOTT CHRISTIAN is a member with The Gillon Group, PLLC in Natchez. He has over thirty years of audit, tax and consulting experience in public accounting. Scott has worked extensively in the banking, healthcare, manufacturing, oil and gas and timber industries. Prior to embarking on his public accounting career, Scott spent 7 years in the banking and financial services field. Scott is a native of Natchez. He earned his Bachelor of Business Administration degree from Millsaps College. He also holds a Masters of Business Administration from Christian Brothers University and a Master of Science in Accounting Systems from the University of Memphis. Within the local community, Scott currently serves as the Treasurer of the Natchez Rotary Club, Secretary/Treasurer of the St. Catherine Creek Utility District, and Treasurer of Beau Pre Country Club. He is a member of the Rotary Club of Natchez, Cathedral School Athletic Association, and the Santa Claus Committee. Scott is also a graduate of the NatchezAdams County Chamber of Commerce Leadership Natchez program. His professional affiliations include the AICPA and the Society of Louisiana CPAs. He has served on the MSCPA Board of Governors, served as the MSCPA Treasurer and served as the President and 1st Vice-President of the Southwest Chapter of MSCPA. He is also a member of the Long Range Planning Committee and will chair the Firm Administration & Development Committee in 2021/2022. Scott and his wife Robin have two children and they attend St. Mary's Basilica.

SECRETARY



Shanell Watson, Clinton

SHANELL WATSON is a program officer with the Woodward Hines Education Foundation (WHEF), primarily responsible for managing programmatic activity related to WHEF's statewide postsecondary attainment priorities. Prior to joining WHEF as a financial analyst in 2007, Shanell worked as an assurance supervisor for HORNE LLP and external grant manager for the Jackson Medical Mall Foundation. She has been licensed as a CPA since 2005 and received a Bachelor of Business Administration and Master of Accountancy from Millsaps College's Else School of Management. Shanell has held a number of community roles, including her current service as Board Chair of the Women's Foundation of Mississippi, where she's also served as Treasurer and ChairElect. She is also a governing board member for Mississippi Action for Progress, a head start agency, and has recently joined the Community Foundation for Mississippi's Board of Trustees. Shanell has represented the MSCPA Central Chapter on the Board of Governors and has been a member of the MSCPA Awards, Education, and Scholarships Committee for twelve years and served as Millennial Chair. In 2009, she was a member of the inaugural Board and Communications Committee of the MSCPA Young CPA Network and is currently a member and former chair of the MSCPA Young CPA Liaison Committee. Shanell is a native of Meridian – she and her husband, Edward, reside in Clinton, with their three sons, Nicholas, Sean and Barrett.

TREASURER



Wil Crawford, Madison

WILKINS M. "WIL" CRAWFORD JR., CPA has over fourteen years of experience providing audit and accounting services to telecommunications, governmental, not-for-profit, higher education and various other clients. Wil is a director in BKD's Jackson office where he leads the office's nonprofit, higher education and public sector industry group. Wil was awarded the Silas M. Simmons Bronze Medal for the 2007 CPA Exam. He also has served as President of the MSCPA Young CPA Network, chair of the MSCPA Governmental A&A Committee, Millennial Chair of the MSCPA Long Range Planning Committee, an MSCPA Board member and was the 2015 inaugural winner of the MSCPA Rising Star Award. He is a member of the Association of Government Accountants. He previously served as Treasurer on the Board of Directors of the Central Mississippi Chapter of the Mississippi State University Alumni Association and on the Madison United Methodist Church finance committee, and he currently serves on the board of directors for Habitat for Humanity Mississippi Capital Area. Wil is a summa cum laude graduate of Mississippi State University with a B.S. degree in accounting and an MPA. He and his wife, Melanie, have two children.

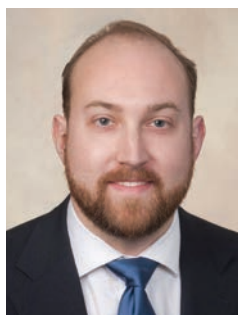
AT-LARGE BOARD MEMBER



Linda Keng, Madison

LINDA KENG is a partner with Jones Walker, LLP in Jackson. Her practice is concentrated in the areas of ERISA and employee benefits, deferred compensation, estate planning and probate. Linda is a native of Hattiesburg and attended the University of Southern Mississippi where she majored in accounting and received a B.S.B.A., with honors. She received her JD with special distinction from Mississippi College School of Law and her LL.M. in taxation, cum laude, from the University of Florida. Active in various business and professional groups, Linda is a member of the American Bar Association, the Mississippi State Bar and the Hinds County Bar Association, the AICPA, the Mississippi Chapter of the Financial Planning Association, and the Mississippi Estate Planning Council. She is an alumni member of the IRS Gulf Coast Area TE/ GE Council and is a past member of the Board of Trustees of the Mississippi Tax Institute. She has formerly served as President and Treasurer of the MSCPA and currently serves as Chair of the Legislation Committee. Linda is a member of the Business Advisory Council for the University of Southern Mississippi College of Business and formerly served on the Board of Directors of the University of Southern Mississippi Foundation. Linda is a member of St. Philip's Episcopal Church in Jackson where she serves on the Finance Committee. Linda and her husband, Randy, reside in Madison.

EDUCATION FOUNDATION TRUSTEE



Josh Norris, Jackson

JOSH NORRIS is Principal at Lefleur Financial, a tax practice and financial planning firm in Jackson. After graduating from the University of Mississippi with a degree in both accounting and international studies, he began his career with Ernst & Young in Memphis. In 2010, Josh bought a small accounting firm in Jackson and moved back to his hometown. Through building relationships and serving clients, Josh began to see a need for more than just tax planning. As a result, he obtained the Certified Financial Planner (CFP) designation and created a sister financial advisory firm to complement the tax practice and provide comprehensive financial services to his clients. Josh is a 2013 graduate of the AICPA Leadership Academy and received the MSCPA Rising Star Award in 2017. In 2019, he earned a Master of Studies in Law (MSL) in Taxation from New York University and was named a finalist for "Top 50 Under 40" by *Mississippi Business Journal* as well as one of *Mississippi Business Journal's* "Top Entrepreneurs." Josh has served on the MSCPA Board of Governors since 2013, first representing the Central Chapter and currently as the Millennial Chair for the State Board Advisory Committee. He has also been a member of the MSCPA Legislative Committee since 2011. Josh has also served on the Board of Directors for the Phoenix Club of Jackson and is currently on the Sally McDonnell Barksdale Honors College Leadership Council.

Mississippi Society of Certified Public Accountants
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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 26, 2021 at nine o'clock. The election of officers, reports from officers, and other business will be conducted at this time.



**Bouillon Wins FREE
Convention Registration**

All members who registered for Convention before May 1 were entered into a drawing to win free registration. A name was drawn during our virtual Board of Governors meeting on May 6 and the MSCPA has announced Marv Bouillon of Hattiesburg as our winner. Congrats, Marv! We look forward to seeing you in Destin soon.

**SBA UNVEILS INITIAL Restaurant
Revitalization Fund Results**

More than 186,000 restaurants, bars, and other food and beverage businesses applied for assistance from the \$28.6 billion Restaurant Revitalization Fund (RRF) during the first two days after the program's application window opened May 3.

The RRF provides restaurants and other eligible businesses with grants equal to their pandemic-related revenue loss, up to \$10 million per business and no more than \$5 million per physical location. The funds can be used for eligible expenses, such as payroll and rent.

All eligible food and beverage providers are allowed to apply to the RRF, but for the first 21 days the SBA will prioritize reviewing applications from small businesses owned by women, veterans, and socially and economically disadvantaged individuals.

After the first 21 days, the SBA will fund all eligible applications on a first-come, first-serve basis. Approved applicants should expect an average of 14 days for processing, review, approval, and funds distribution, the SBA said.

Restaurants and other food and beverage providers have been among the hardest hit businesses during the COVID-19 pandemic.

Eligible entities for the RRF include:

- Restaurants;
- Food stands, food trucks, and food carts;
- Caterers;
- Bars, saloons, lounges, and taverns;
- Snack and nonalcoholic beverage bars;
- Inns at which on-site sales of food and beverages to the public comprise at least 33% of gross receipts; and
- Bakeries, brewpubs, tasting rooms, taprooms, breweries, microbreweries, wineries, and distilleries at which on-site sales to the public comprise at least 33% of the gross receipts;
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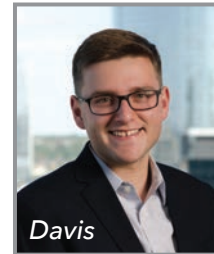
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Young CPA Conference

MSCPA officially kicked off “CPE season” April 28 with our Young CPA Conference. Over 80 online and in person attendees heard from speakers Brent McClure, Gay Saxon, Jay White and Daniel Champney.

Noah Davis, Staff Accountant with Rea, Shaw, Giffin & Stuart, LLP; Kassie Dollar, Tax Manager with Silas Simmons, LLP; Lindsay James, Staff Accountant with Stephanie Higginbotham, CPA, PLLC; Cliff Kinney, Member with Kinney & Associates, PLLC; and Andres Posada, Healthcare Manager with HORNE LLP, were elected to the YCPA Network Board of Governors during the YCPA Business Meeting.

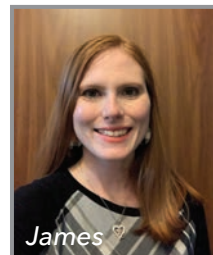
Thank you to the Young CPA Network for planning such a great event.



Davis



Dollar



James



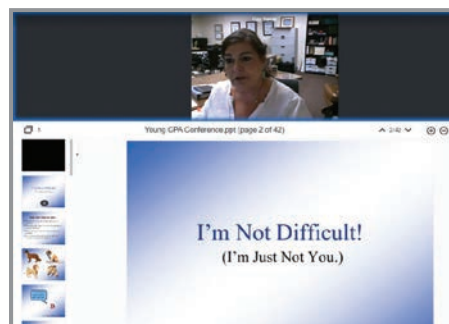
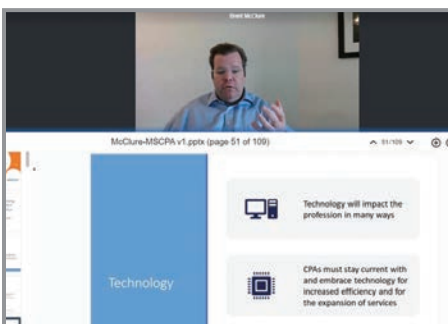
Kinney



Posada



YCPA Network Board in Attendance: (Front) Shannon Adams, Immediate Past President; Peyton Gordon, Board Member (Back) Ashley Sullivan, Board Member; Jack Kaler, President; Phillip Chu, Vice President/President-Elect





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US Master Depreciation Guide, 2021, Special Edition	June 2021	10070502-0002	\$279.00	\$195.30
US Master Estate & Gift Tax Guide, 2022	June 2021	10031732-0012	\$199.00	\$139.30
Internal Revenue Code, Summer 2021	June 2021	10037776-0007	\$249.00	\$174.30
Income Tax Regulations, Summer 2021	June 2021	10037777-0007	\$349.00	\$244.30
US Master Property Tax Guide, 2021	Mar 2021	10013408-0011	\$249.00	\$174.30
Multistate Corporate Tax Guide - Mid-Year Edition, 2021	June 2021	10036593-0008	\$519.00	\$363.30
GAAP Financial Statement Disclosures Manual (2021-2022)	Jul 2021	10029932-0015	\$529.00	\$370.30
Governmental GAAP Guide, 2022	Jul 2021	10016980-0014	\$529.00	\$370.30
Governmental GAAP Disclosures Manual, 2021	Mar 2021	10064167-0004	\$399.00	\$279.30

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UPCOMING CPE



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



5/27/2021
Thurs

The New Auditors' Reporting Standards
Speaker: Jeffrey Lieman



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

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



5/28/2021
Fri

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



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

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



6/1/2021
Tues

Winning the Fraud Battle in the 21st Century: Prevention and Detection
Speaker: Donna Ingram

Our focus is to reduce the overall risk of fraud. To that end, this course focuses on what factors contribute to turning honest employees into fraudsters. Discussion will include integrity and ethics, as well as how people may react in certain situations. We will also touch upon what lurks in the darknet along with cryptocurrency fraud.

ACRONYM:..... CL4REMA / CL4REMAW
 VENDOR:AICPA
 Level: Intermediate
 CPE Credit: 4 A&A
 City: Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$160 / \$200
 Time: 8:30am-12:00pm



6/2/2021
Wed

Conducting a Remote Audit
Speaker: Curtis Quickel

Auditing changed significantly in 2020, and some of those changes are likely to be with us permanently. This course will take the auditing standards we must follow and apply them practically to real-life examples of remote auditing

ACRONYM:..... FUR4 / FUR4W
 VENDOR:Surgent
 Level: Intermediate
 CPE Credit: 4 A&A
 City: Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$160 / \$200
 Time: 1:00pm-4:30pm



6/2/2021
Wed

Annual FASB Update and Review
Speaker: Curtis Quickel

Designed for practitioners and their staff, whether in public accounting or business and industry, this course provides an overview of recent FASB accounting and reporting developments. The course begins by reviewing recent Private Company Council (PCC) activities and recently issued Accounting Standards Updates (ASUs), analyzing guidance that has a major effect on all industries, including those covering revenue recognition and leases and the accounting and financial reporting considerations related to COVID-19. Special attention is given to standard setters' activities that affect small and medium-sized entities. Examples and illustrations provide hands-on application to help you assess and implement the new standards and guidance applicable to your practice and clients.

ACRONYM:..... GTF990 / GTF990W
 VENDOR:MSCPA
 Level: Update
 CPE Credit: 8 Tax
 City: Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$280 / \$350
 Time: 8:30am-4:30pm



6/3/2021
Thurs

Guided Tour of the Form 990+Schedules
Speaker: Brian Yacker

This session will focus on providing attendees with a comprehensive summary of the entire Form 990, specifically including hot button reporting issues, efficient methods to prepare the Form 990, proactive reporting to best tell the organization's "story", current IRS Form 990 audit issues, governance best practices, the supporting of reasonable compensation, special events reporting issues and functional expense allocations. Additional specific areas of coverage include the Schedule A public support test, Schedule B contributors listing, Schedule C lobbying reporting, uncertain tax positions and the reporting of insider transactions on Schedule L.

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



6/4/2021
Fri

The Essential Guide to Nonprofit Accounting
Speaker: Brian Yacker

This session will address the key nonprofit accounting issues, including the following; the nonprofit universe, why "nonprofit" is a misnomer, financial statement audit considerations for nonprofits, effective internal controls for nonprofits, net assets traps for the unwary, contributions revenue, restricted v. conditional contributions, when to book pledges as revenue, accounting for special events, auctions v. raffles, agency transactions, effective functional expense allocations, how to best conduct/document insider transactions, disclosure of uncertain tax positions, summary of GAAP v. Form 990 reporting differences and common financial statement deficiencies.

ACRONYM:.....ACL4 / ACL4W
 VENDOR:Surgent
 Level:Advanced
 CPE Credit:4 Tax
 City:Ridgeland
 Location:MSCPA Training Center / Online
 M / N:\$160 / \$200
 Time:8:30am-12:00pm



6/7/2021
Mon

Limited Liability Companies: Losses, Liquidations, Terminations, Continuances, and Sales
Speaker: Harris (Trip) H. Barnes III

The purpose of this course is to provide an in-depth discussion of selected advanced-level issues affecting LLCs and LLPs.

ACRONYM:.....BSP4 / BSP4W
 VENDOR:Surgent
 Level:Intermediate
 CPE Credit:4 Tax
 City:Ridgeland
 Location:MSCPA Training Center / Online
 M / N:\$160 / \$200
 Time:1:00pm-4:30pm



6/7/2021
Mon

Succession Planning for the Small Business Owner: Finding the Exit Ramp
Speaker: Harris (Trip) H. Barnes III

The life cycle of the small business can be summed up in three segments: 1) starting the business; 2) operating the business; and 3) getting out of the business. This course focuses on getting out of the business. The most elusive element of owning a small business can be finding the proper exit strategy. This course is designed to provide the business consulting practitioner with tools and concepts to advise the small business owner and assist them in developing the right exit strategy. The course covers exit strategies related to third-party sales and succession planning within a family.

ACRONYM:.....CL4YBAP / CL4YBAPW
 VENDOR:AICPA
 Level:Basic
 CPE Credit:4 A&A
 City:Ridgeland
 Location:MSCPA Training Center / Online
 M / N:\$160 / \$200
 Time:8:30am-12:00pm



6/8/2021
Tues

Yellow Book: Application of GAGAS Principles
Speaker: Cecil M. (Bill) Felder

This course, based on Government Auditing Standards, 2018 Revision, is essential for auditors performing Yellow Book audits and provides an excellent baseline of information as it relates to understanding Yellow Book requirements and application guidance. It also provides detailed information that all auditors planning and conducting engagements in accordance with the Yellow Book need to understand to be able to discern the requirements related to independence. This course qualifies for Yellow Book credit.

ACRONYM:.....UTC4 / UTC4W
 VENDOR:Surgent
 Level:Intermediate
 CPE Credit:4 A&A
 City:Ridgeland
 Location:MSCPA Training Center / Online
 M / N:\$160 / \$200
 Time:1:00pm-4:30pm



6/8/2021
Tues

Understanding and Testing Control and Compliance in a Single Audit
Speaker: Cecil M. (Bill) Felder

The control and compliance requirements applied in a single audit differ from the requirements applied in a GAAS audit. As a result, sometimes it's even difficult to tell where the auditor's responsibilities start or stop in a single audit. This course is designed to help you proceed and succeed in applying the single audit control and compliance requirements. Over 15 focused exercises are included to provide an enhanced working knowledge of the most critical challenges in single auditing today. This course qualifies for Yellow Book credit.

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



6/9/2021
Wed

Tax Planning for Small Businesses
Speaker: William F. (Bill) Taylor

Solid tax planning strategies are essential for your corporate What tax planning strategies will you provide for your corporate and small business clients? This course explores state-of-the-art planning ideas and tax-saving strategies to keep more of your clients' money in their pockets. Updated for the latest legislation and IRS guidance on tax reform, this course answers the tough questions and show you what strategies are best for your clients as a result of the most recent tax legislation.

ACRONYM:.....TSETPT / TSETPTW
 VENDOR:AICPA
 Level:Intermediate
 CPE Credit:4 Tax
 City:Ridgeland
 Location:MSCPA Training Center / Online
 M / N:\$160 / \$200
 Time:1:00pm-4:30pm



6/9/2021
Wed

Taxation of Property Transactions
Speaker: William F. (Bill) Taylor

Gain a practical understanding of the various complex tax laws dealing with sale, disposal, or exchange of property. This course includes analyses of the rules dealing with like-kind exchanges, and includes involuntary conversions. It also covers important property-related timing issues and planning opportunities that can lead to significant tax savings.

ACRONYM:.....PMI4 / PMI4W
 VENDOR:.....Surgent
 Level:.....Basic
 CPE Credit:.....4 Tax
 City:.....Ridgeland
 Location:.....MSCPA Training Center / Online
 M / N:.....\$160 / \$200
 Time:.....8:30am-12:00pm



**6/10/2021
Thurs**

**Select Estate and Life Planning
Issues for the Middle-Income Client
Speaker: William F. (Bill) Taylor**

Clients think that estate planning only applies to the very rich. In truth, there are many issues of critical concern for which the middle-income client needs to plan. This course is a must-attend for all CPAs who work with middle-income clients and are looking for ways to provide additional quality services. Updated for developments relative to estate tax changes.

ACRONYM:.....SCR4 / SCR4W
 VENDOR:.....Surgent
 Level:.....Intermediate
 CPE Credit:.....2 General/2 Tax
 City:.....Ridgeland
 Location:.....MSCPA Training Center / Online
 M / N:.....\$160 / \$200
 Time:.....1:00pm-4:30pm



**6/10/2021
Thurs**

**Securing a Comfortable Retirement
Speaker: William F. (Bill) Taylor**

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:.....HCR4 / HCR4W
 VENDOR:.....Surgent
 Level:.....Basic
 CPE Credit:.....2 General/2 Tax
 City:.....Ridgeland
 Location:.....MSCPA Training Center / Online
 M / N:.....\$160 / \$200
 Time:.....8:30am-12:00pm



**6/11/2021
Fri**

**Employer's Handbook: Health Care,
Retirement, and Fringe Benefit Tax Issues
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 and tax issues associated with all aspects of employment, especially now. This course provides in-depth coverage of this critical area. Updated and supplemented throughout the year for breaking developments.

ACRONYM:.....CL4VCCO / CL4VCCOW
 VENDOR:.....AICPA
 Level:.....Basic
 CPE Credit:.....4 General
 City:.....Ridgeland
 Location:.....MSCPA Training Center / Online
 M / N:.....\$160 / \$200
 Time:.....1:00pm-4:30pm



**6/11/2021
Fri**

**Change the Way You Work: Success as a Virtual CFO
Speaker: William F. (Bill) Taylor**

Small and growing businesses do not have the funds to hire a CFO, but still need advice on strategic, financial, and operational matters. In many cases, these businesses are turning to virtual (or out-sourced) CFOs to guide them through periods of transition or growth. CPAs and other finance and accounting professionals are well positioned to be virtual, strategic business partners for these companies. In this course, you'll learn the core competencies that a virtual CFO needs and the role that a virtual CFO can provide. The course will emphasize the synergy between competencies developed by experienced CPAs and finance and accounting professionals and successful virtual CFOs. Finally, you'll understand potential service models and the need for a readiness assessment before embarking on this career trajectory.

ACRONYM:.....FASO4 / FASO4W
 VENDOR:.....Phoenix Beach
 Level:.....Basic
 CPE Credit:.....4 A&A
 City:.....Ridgeland
 Location:.....MSCPA Training Center / Online
 M / N:.....\$160 / \$200
 Time:.....8:30am-12:00pm



**6/14/2021
Mon**

**How Fraud Can Affect Smaller Organizations
Speaker: Karl Egnatoff**

Many small to medium sized companies do not properly address the risk that arises which is related to fraud because these organizations do not have the resources needed to mitigate this risk or because owners or those in top level management underestimate the scope of the issue. All organizations, regardless of size, must be aware of the risks associated with intentional fraudulent acts and know that a significant and effective fraud scheme could even present going concern issues for some entities. In this session, we delve into the reasons that fraud take place. The material discusses the types of defalcations that are often executed against smaller entities and then explores measures that organizations can implement to help stop fraud activities and add security.

ACRONYM:.....ICPW4 / ICPW4W
 VENDOR:.....Phoenix Beach
 Level:.....Basic
 CPE Credit:.....4 A&A
 City:.....Ridgeland
 Location:.....MSCPA Training Center / Online
 M / N:.....\$160 / \$200
 Time:.....1:00pm-4:30pm



**6/14/2021
Mon**

**Internal Control Planning for the Post Pandemic World
Speaker: Karl Egnatoff**

One of the statements regularly made by political figures, news outlets and business professionals is that the world will never return to the way it was before the 2020 pandemic (this may be the only thing that everyone agrees on). Factors such as the expectation that telecommuting will now be more widespread than ever before, and that, while business travel will recover, electronically driven commerce is in the front seat moving forward. Importantly, most experts believe that the upheaval that started with the pandemic will continue for years to come. This session sets forth action steps for organizations as they prepare to operate after the pandemic is finally controlled. Participants that take this session will see how the events of 2020 will affect the direction that organizations choose as the control operations and address security moving forward.

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



6/15/2021
Tues

**Using Internal Control to Strengthen Security,
 Efficiency, and Employee Conduct**
Speaker: Karl Egnatoff

Many leaders in business organizations of all sizes view the system of Internal Control primarily as a protective security measure. This is a great first step, however a well-designed internal controls system can and will drive all entity objectives. This session uses information gathered from years of creating internal control systems as well as concepts from well-respected authoritative pronouncements and frameworks to illustrate the power of a strong and well supported control system as well as actions that can help establish such a system. This material is becoming more and more beneficial as companies strive to address many new business challenges such as evolving markets, the rapid rate of change in the business world and the notable increase in governmental and industry-based regulation. Those that work with internal controls and regularly consider ways to improve the functionality of internal control systems should strongly consider this session.

ACRONYM:..... AXLT / AXLTW
 VENDOR: Phoenix Beach
 Level: Advanced
 CPE Credit: 8 General
 City:..... Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$280 / \$350
 Time: 8:30am-4:30pm



6/16/2021
Wed

Advanced Excel® Topics for Spreadsheet Power Users
Speaker: Karl Egnatoff

Accountants and other business professionals that work in Excel® extensively become very strong with many aspects of the ubiquitous spreadsheet application. They, however, often do not have knowledge of the numerous advanced features available in Excel®. In this session we highlight many of the powerful tools found in Excel® and provide details as to how they are beneficial and how they are used. Topics include, data connectivity, advanced functions available for formula creation, Excel® Tables and PivotTables, and charting tools. Many proficient Excel® users only utilize a limited percentage of the available functionality when they work with spreadsheets, which is like tying one's hands behind his back. This session will help make participants "two-fisted" Excel® users!

ACRONYM:..... SR4 / SR4W
 VENDOR: The Knowledge Institute
 Level: Intermediate
 CPE Credit: 4 General
 City:..... Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$170 / \$210
 Time: 8:30am-12:00pm



6/17/2021
Thurs

Staff Retention
Speaker: Don Minges

Does it seem like you spend far too much time recruiting? Do your people leave just as they become productive? If you think your turnover is because Millennials are different from earlier generations, you probably are not looking at the real source of your problem. Learn the changes you should make now!

ACRONYM:..... BSM / BSMW
 VENDOR: The Knowledge Institute
 Level: Intermediate
 CPE Credit: 4 General
 City:..... Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$170 / \$210
 Time: 1:00pm-4:30pm



6/17/2021
Thurs

Balance Sheet Management: The Least Understood Risk?
Speaker: Don Minges

Most organizations manage their income statement, but many virtually ignore the balance sheet until balance sheet problems create seemingly insurmountable emergencies. This session discusses how to analyze and manage your financial statements more holistically, allowing you to identify and correct balance sheet issues early. How do you choose whether to raise debt or equity? What are the key considerations and the advantages of each? What is the cost of capital? What are the 'hidden' balance sheet risks? We will also examine several crucial ideas you can incorporate into your analyses to enhance performance and reduce risk. If you want to enhance your corporate finance skills, this session is for you.

ACRONYM:..... CFOS4 / CFOS4W
 VENDOR: The Knowledge Institute
 Level: Intermediate
 CPE Credit: 6 A&A/2 General
 City:..... Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$280 / \$350
 Time: 8:30am-4:30pm



6/18/2021
Fri

Cash Management: Managing the Lifeblood of the Business
Speaker: Don Minges

Our responsibility to safeguard our organization's assets has not changed in the 21st Century, but our tools have. New tools now allow us to more efficiently and effectively manage and control all the aspects of accounts receivable and payables. This session will help you save time on routine tasks. We can use the time saved to become better business partners. This session will discuss how we can leverage our accounts receivable and accounts payable skills to add value and help our organization succeed.

ACRONYM:..... CL4INRR / CL4INRRW
 VENDOR: AICPA
 Level: Intermediate
 CPE Credit: 4 A&A
 City:..... Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$160 / \$200
 Time: 8:30am-12:00pm



6/21/2021
Mon

**Interpreting the New Revenue Recognition Standard:
 What All CPA's Need to Know**
Speaker: Curtis Quickel

The effective date of FASB ASC 606, Revenue from Contracts with Customers, is upon us! Do you know which contracts are within the scope of the standard and when revenue should be recognized at a point in time or over time? This course answers those questions by providing a basic understanding of the five-step process for recognizing revenue under FASB ASC 606. Supported by practical examples, this course addresses core principles that all CPAs need to know. Recent updates to this course include the latest guidance from FASB, industry-specific examples taken from the AICPA Audit and Accounting Guide Revenue Recognition, as well as disclosure illustrations.

ACRONYM:..... CL4LEAS / CL4LEASW
 VENDOR:AICPA
 Level: Intermediate
 CPE Credit: 4 A&A
 City:..... Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$160 / \$200
 Time:1:00pm-4:30pm



**6/21/2021
Mon**

**The Bottom Line on the New Lease Accounting Requirements
Speaker: Curtis Quickel**

Which leases are within the scope of FASB ASC 842, Leases, and what are the basic accounting, financial reporting and disclosure requirements? This course addresses those questions by focusing on the basic core principles of this new major standard. Discussion includes basic identification, recognition, measurement, presentation and disclosure requirements. Case study exercises are included to illustrate application of the standard. This course discusses the lessee accounting model, including lease classification, amortization of the right-of-use asset, and interest on the lease liability. This course also discusses the lessor accounting model, including profit recognition and collectability.

ACRONYM:..... AAU4 / AAU4W
 VENDOR:Surgent
 Level: Update
 CPE Credit: 4 A&A
 City:..... Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$160 / \$200
 Time:8:30am-12:00pm



**6/22/2021
Tues**

**Current Issues in Accounting and Auditing: An Annual Update
Speaker: Curtis Quickel**

Designed for accounting and attestation practitioners at all levels in both public accounting and business and industry, this course provides an overview of recent accounting, compilation, preparation, review, and attestation matters including: recently issued and proposed Accounting Standards Updates (ASUs); the Lease Accounting – Topic 842; Impairments – Topic 326; an update on the status of Topic 606 implementation; SSARS No. 21, Clarification and Recodification and other new and proposed standards issued by the ARSC; recent AICPA and PCAOB releases; and other important A&A practice matters you should be aware of, including peer review and audit quality.

ACRONYM:..... USS4 / USS4W
 VENDOR:Surgent
 Level: Intermediate
 CPE Credit: 4 A&A
 City:..... Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$160 / \$200
 Time:1:00pm-4:30pm



**6/22/2021
Tues**

**Update on Recent AICPA Standard Setting:
Staying Current in a Changing Environment
Speaker: Curtis Quickel**

Professional standards are changing with the times and the desire of the AICPA to move the profession into a new era where use of data analytics and artificial intelligence will play a key role in an audit. We are seeing changes already as the AICPA has recently issued standards that significantly modify the form of the independent auditor's report. In addition, its Omnibus standard modifies several professional standards including those on related parties, consideration of fraud and the auditor's communication to those charged with governance. The new auditing standard on employee benefit plan audits makes significant changes in the auditor's report as well as other aspects of an employee benefit plan audit. Further, recently issued Statements on Standards for Accounting and Review Services (SSARS) have addressed the consideration of going concern and other significant issues. In addition, the AICPA has proposed a new SSARS that will conform its standards with international standards for such engagements. The AICPA has also recently issued new Statements on Standards for Attestation Engagements on Agreed-Upon Procedures and materiality. Clearly, with regard to professional standards, the only constant is change. This course will review recently issued SASs and SSARS and provide both insights into the new standards including how to best implement them.

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



AICPA

**6/23/2021
Wed**

**Advanced Controller and CFO Skills
Speaker: Curtis Quickel**

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!

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



AICPA

**6/24/2021
Thurs**

**Construction Contractors: Accounting and Auditing
Speaker: Andy Copeland**

The construction industry is one of the most unique when it comes to being in compliance with the various accounting and auditing standards. This course examines the core knowledge necessary to succeed and the key issues impacting construction accounting and auditing, including the new revenue recognition guidance. Find out what other new developments may mean for you, your company, or your clients. In addition, this course explores the relationship between the contractor and the surety. With construction comprising such a large portion of the economy and always growing, it is more important than ever for you to be on top of the very latest in accounting and auditing changes for the construction industry.

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



6/25/2021
Fri

Applying the Uniform Guidance in Your Single Audits
Speaker: Lynda Dennis

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 qualifies for Yellow Book credit.

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



6/28/2021
Mon

Advanced Tax Planning for S Corps
Speaker: William F. (Bill) Taylor

As a tax practitioner, you need to understand the intricacies of the ever-popular S Corporation form of doing business and consider the tax affect various types of S Corporation distributions will have on its shareholders. Updated for the latest guidance on tax reform, this course examines planning and reporting successful complex S Corporation transactions. The uses of Qualified Subchapter S Subsidiaries are also explored to help you minimize your client's tax bill with winning strategies related to this type of entity.

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



6/29/2021
Tues

Tax Fundamentals of LLCs and Partnerships
Speaker: William F. (Bill) Taylor

LLC and partnership taxation are considered by many one of the most complex areas of our Internal Revenue Code. If you are new to the subject, or if you have worked in this area for years but need a quick review, this course will provide a firm grasp of the fundamental concepts, help you to build a strong foundation of knowledge and freshen up your skills. This course addresses the tax consequences of the most common transactions engaged in by LLCs and partnerships. Develop a level of comfort with the basic conceptual framework underlying partnership and LLC taxation, with an emphasis on explaining the tax consequences associated with issues that are most frequently confronted by tax practitioners.

ACRONYM:..... ERR-3 / ERRW-3
 VENDOR:MSCPA
 Level: Update
 CPE Credit: 3 Ethics/1 MS Rules
 City: Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$160 / \$200
 Time: 8:30am-12:00pm



6/30/2021
Wed

Ethics, Rules, and Regulations
Speaker: Donna Ingram

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

ACRONYM:..... FIPS4-1 / FIPS4W-1
 VENDOR:MSCPA
 Level: Basic
 CPE Credit: 4 A&A
 City: Ridgeland
 Location:MSCPA Training Center / Online
 M / N: \$160 / \$200
 Time: 1:00pm-4:30pm



6/30/2021
Wed

Fraud in Plain Sight
Speaker: Donna Ingram

What can be obvious, yet hidden in plain sight? Fraud. An act of fraud often goes undetected because it takes the form of boring background noise. A routine journal entry or document, upon closer inspection is anything but routine. With hindsight, what at first was hidden becomes obvious and we wonder why we didn't detect it sooner. This session is designed to increase your fraud awareness to aid in detecting what others are trying to conceal.

ACRONYM:..... AQBW
 VENDOR:K2
 Level: Intermediate
 CPE Credit: 4 A&A
 Location: Online
 M / N: \$170 / \$210
 Time: 8:30am-12:00pm



7/12/2021
Mon

K2's Advanced QuickBooks Tips and Techniques
Speaker: Various

QuickBooks remains one of the leading accounting solutions for small and growing businesses and Intuit has added numerous advanced features to the application over the past few releases. In this seminar, you will learn how to take advantage of many of QuickBooks' new and advanced features to solve important issues. For example, you will learn advanced inventory management techniques, including the ability to change the default costing methodology in QuickBooks, and implementing lot and serial number tracking. You will also learn how to build complete sets of financial statements in Excel that link in real-time to underlying QuickBooks data files and how to create multi-company financial statements. Additionally, you will learn how to put the Client Data Review feature to work to streamline the process of identifying and correcting errors and closing accounting periods in QuickBooks. Knowing how to take advantage of the advanced tools and features available can determine your level of success when working with QuickBooks. Take advantage of this opportunity to learn about QuickBooks' "deep" features so that you maximize your effectiveness with the application.

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CHIEF FINANCIAL OFFICER NEEDED:

A community bank in East Central Mississippi is seeking a qualified candidate to join the management team as Chief Financial Officer (CFO). The CFO is responsible for all financial functions related to the accounting systems of both the bank and holding company. This includes financial information for internal management purposes as well as for external financial reporting. Additional responsibilities are to: prepare the bank's budget, monitor interest rate risk, and manage corporate income taxes. The CFO reports to the President & CEO and works in conjunction with the President & CEO to set interest rates for products, determine bids for public deposits, manage the investment portfolio, and monitor the bank's liquidity position. Additionally, the CFO assists with management of employee benefit plans (ESOP, 401k, Cafeteria). **REQUIREMENTS:** Bachelor's Degree in Accounting, Finance, or related field with at least 5 years of financial industry experience. Must be knowledgeable of federal and state banking laws and regulations, proficient with Microsoft Office products, and possess strong organizational skills. CPA license and prior experience with the management of employee benefit plans preferred.

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