



MSCPA

MISSISSIPPI SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS

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OCTOBER 2013

Cloud Storage: Understanding the Options and Managing the Risks

by Thomas G. Stephens, Jr., CPA, CITP

Introduction

Over the past few years, the concept of storing data in the Cloud has grown from a novelty to something that is now approaching mainstream. The advantages are obvious: anytime, anywhere access to data at costs that range from free to just a few cents per gigabyte per month. However, there are risks associated with storing data in the Cloud and failing to properly manage these risks can lead to consequences ranging from mildly embarrassing to potentially catastrophic and litigious. In this article, we examine both the advantages and risks of several popular Cloud-based data storage solutions and present options for enhancing the security of the data you might choose to store in the Cloud.

The BYOC Phenomenon

Many are familiar with Bring Your Own Device (BYOD) and the potential issues it raises for organizations of all sizes. With BYOD, team members often acquire their own mobile devices and connect them to a corporate network to access email, data, and even applications.

When unmanaged, BYOD subjects the organization to numerous risks, including potentially compromising sensitive data through unsecured mobile devices; consequently, organizations are now moving to manage BYOD.

An equally risky situation presents with Bring Your Own Cloud (BYOC). With BYOC, team members choose to subscribe to a consumer-oriented Cloud-based storage service such as Box, Dropbox, or Google Drive to facilitate keeping files in sync across multiple devices and to potentially share files with external users, including customers or clients. In general, these types of services work quite well and, potentially, solve many data storage and synchronization problems for their subscribers. Further, they typically offer some level of storage at no charge and additional storage capacity is available at nominal annual costs. Table 1 presents a summary of some of the more popular consumer-oriented Cloud-based storage services.

While the services work exceptionally well and are quite easy to use, left

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2014 MSCPA Convention

June 26-29, 2014

Sandestin Golf & Beach Resort



2015 MSCPA Convention

June 25-28, 2015

Sandestin Golf & Beach Resort

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40th Annual Mississippi Tax Institute

Hilton Hotel

Jackson, Mississippi

Tuesday,

Dec. 3, 2013

Registration Fee: \$175

Major Events in November & December

Not-For-Profit Conference	November 1
Corporate Income Tax Boot Camp With Gordon Meicher	November 4-5
1040 Individual Income Tax Update With Gordon Meicher	November 6-7
Tupelo Cluster	November 12-14
Business Valuation & Litigation Services Conference	November 15
Mississippi Tax Institute	December 3
Hattiesburg Cluster	December 9-10



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The CPA Newsletter is the official publication of the Mississippi Society of Certified Public Accountants. The Newsletter invites articles of interest to the profession and gives credit to the author; however, it reserves the right to edit articles for correct spelling, wording and punctuation.

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

Welcome New Members

New members include: William Robert Clark, Vicki Oliphant Henson, Charles Lance Hill, Jacob Brandon Jones, Lynn B. Lister, Tara Beth Stigall, Jacqueline Moak Vinson, Thomas Michael Wirt, and Joseph Boland Zimmerman.

Now completing the membership process are:

Charles F. Farmer IV was born in Knoxville, Tennessee and received a BBA in Marketing from the University of Mississippi and a BS in Accounting from the Mississippi University for Women. He is a Staff Accountant with Nail McKinney P.A. in Tupelo.

Jason Daniel Hicks was born in Mississippi and is applying as an Associate Member. He received an Associate of Arts from Hinds Community College and a BS in Accounting from Belhaven University. He is an Associate with Horne LLP in Ridgeland.

Clark Clifton Luke was born in Philadelphia, Mississippi and received his Bachelor of Accountancy, Master of Taxation and Juris Doctorate from the University of Mississippi and LL.M. in Taxation from the University of Florida. He is an Associate Attorney with Watkins & Eager PLLC in Jackson.

Tolliver C. McMullen was born in

Jackson and received his Bachelor of Accountancy from Mississippi State University and an MBA with a concentration in Accounting from Mississippi College. He is a Senior Accountant with Lefoldt & Co., PA in Ridgeland.

John P. Paris was born in Lake Providence, Louisiana and received his Bachelor of Arts from Louisiana Tech University. He is a Partner with May & Company, LLP in Vicksburg.

Amy Jolene Smith was born in Hattiesburg and received her Bachelor of Science in Business Administration and Master of Professional Accountancy from the University of Southern Mississippi. She is a Staff Accountant with McArthur, Thames, Slay & Dews, PLLC in Hattiesburg.

Tara Beth Stigall was born in Ottumwa, Iowa and received a BBA from AIU Online and an MBA from Mississippi College. She is on the Audit Staff of Carr, Riggs & Ingram, LLC in Ridgeland.

David Matthew Wise was born in Tupelo and received Bachelor of Accountancy and Master of Public Accountancy degrees from Mississippi State University. He is a Staff Accountant with Watkins, Ward & Stafford PLLC in Okolona.

State Board Names Ransom C. Jones, Jr. Executive Director

The Mississippi State Board of Public Accountancy is pleased to announce the selection of Ransom C. Jones, Jr., CPA as Executive Director. The State Board of Public Accountancy is the state agency responsible for regulation of Certified Public Accountants in Mississippi.

Its mission is to protect the public welfare of the citizens of the State of Mississippi through oversight and regulation of certified public accountants (CPAs) and maintaining the highest standards of proficiency in the profession.

Mr. Jones brings a wide variety of experiences to the position including public accounting, internal auditing, and 17 years as State Board investigator. A Certified Public Accountant and Certified Governmental Financial Manager, he is a member of the American Institute of Certified Public Accountants, the Mississippi Society of Certified Public Accountants, and the Association of Government Accountants.

Ransom is a member of Madison United Methodist Church where he has served on the finance committee and a term as financial secretary. Ransom and his wife, Doris, are parents of two grown children and live in Madison.



Take a “Crawl, Walk, Run” Approach to Successful Software Implementations

By Sarah Parker

Some software discovery meetings become free-for-all sessions where IT asks for server upgrades, marketing asks for a fully functional CRM with marketing automation, several partners want real-time business analytics on their projects and the billing manager wants to automate billings and have it synchronized with the firm's overall database.

With so many voices in the room, it's no wonder the firms we come across have expressed a distinct fear of failure when it comes to implementing a system to meet all these needs (and then some). It is also why many firms settle for disparate systems, making marketers rely on Excel spreadsheets for prospect lists and tax software for current client addresses. Billers are stuck in a rut with tedious billing periods, and IT makes sure it maintains the patchwork.

Does life in 2013 need to be this difficult? There is good news: the alternative to disparate software programs is not a failed CRM implementation. By combining these programs on a single platform, such as Microsoft Dynamics, firms can begin to consolidate their databases.

A big concern with consolidation is privacy of contacts. There are systems that allow for control mechanisms and put restrictions on who can view what in a system.

We at Templeton Solutions have devised the “Crawl, Walk, Run” approach for our clients' implementations. By helping with identifying the most pressing need (usually aggregating data into a single location), and developing an efficient, phased approach, we have helped our clients realize a 100% CRM implementation success rate. Each phase is closed out with train-the-trainer sessions to make sure there is firm buy-in every step of the way.

After a complete review and holistic assessment, we devise the phased approach. There are software and user-testing metrics each step of the way to ensure a successful launch.

When you are ready to start crawling, here is a list of questions to ask your potential software provider:

1. Does the provider have knowledge of and experience in the CPA industry?
2. Does the product provide information that leads to insights for managing a successful practice?
3. Does the product include a business intelligence environment for managers to senior partners to customize dashboards?
4. Does the product include project and resource planning capabilities along with forecasts for firm

revenues, realizations and resource needs?

5. Is the product capable of showing ROI of marketing campaigns?
6. Is the product capable of tracking relationships and efforts starting with Marketing through to Invoicing?
7. Does the product have the capability to be offered on-premise or in the cloud with full functionality?
8. Does the product fully integrate with Microsoft Outlook®?

Sarah Parker serves as Client Services Director for Templeton Solutions and manages all aspects involving supporting client engagement service and deliverables.

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Stop Selling to These Four Types of Prospects Now!

By Eric Hunt

My definition of revenue generation is that it is the science of attracting and retaining clients. We all know that retaining clients is much less expensive than trying to replace them with new ones. The problem is that if you don't find new business, the odds of success go down. Generating new revenue is essential for the growth of your company. Too often, people will take any new business they can get because they want the revenue. You have to be very careful in your selling process to make sure that you find the right fit for you and your team. A "yes" doesn't always mean a "win" when you take the whole picture into account. Contrary to what many salespeople will tell you, not every signed deal is good deal.

It is much better to identify problem prospects before they become problem clients. There are four types of problem prospects I have determined that I don't want to work with. They will drain time,

energy and team resources once they are signed. Once they are clients, they almost always prove themselves to be "D" clients. Cutting "D" clients is MUCH harder than dealing with them during the sales process when you can cut your losses without having any money change hands. Sign them and many other issues come into play. What are these four types of problem prospects you should avoid?

The Tease – This is the prospect that tells you over and over how much they love your company and that they really want to work with you. You go back and forth with them only to find that they never really plan to commit. Frustration builds because you know they would be great to work with and they know they need your services. However, they never actually end up committing. The Tease can drag out your sales cycle for months if not years, yet never do any business with you.

The Low-Baller – Price is always

an issue for the Low-Baller. I have no problem with a prospect concerned with price or trying to negotiate. I raise the red flag when the price objections are multiple and communicated with contempt. Price concerns are a part of selling and an opportunity to communicate value. But, they become dangerous when the only way to make a prospect happy is with price concessions. I have found that people that are only focused on price are the ones that value your service the least. This is not the type of client you want on your books!

The Know-It-All – One of the most difficult prospects to sell to, and ultimately work with, is The Know-It-All. Every salesperson has dealt with the Know-It-All in the selling process at some point. This is the person that seems to have all the answers and just can't see how your service can help them. Clearly communicating your value proposition

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CLOUD STORAGE

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unmanaged, at least three risks can impact the organization when team members embark upon BYOC.

1. The organization no longer controls the data. As a general rule, the license to use a consumer-oriented solution rests with the individual, not with the organization. Thus, if the subscribing team member leaves the organization, the organization has no control over the data stored in the subscribers BYOC solution. Further, in the absence of organizational control, it is possible, if not likely, that multiple copies of the same data file will appear in scattered, disconnected Clouds.

2. The data may not be properly secured. While virtually all of the consumer-oriented Cloud storage services encrypt data while it is being transmitted to and from their Cloud, not all encrypt the data while it is stored on their servers. Further, in some cases, those that do encrypt the data on their servers sometimes hold the encryption key, meaning that their team members might potentially view your data, including confidential data.

3. Sensitive data may “leak” out of the organization. Because the organization cannot control with whom the subscriber shares files or folders in a BYOC solution, it is possible that sensitive data might become compromised. This data could be company-confidential data, in which case the disclosure might be embarrassing to the organization, or it could be customer/client/patient-confidential data, in which case the disclosure might lead to litigation.

Managing Cloud Storage Risk

While the above might cause some

organizations to ban all Cloud-based storage, doing so means that team members will not be able to experience the benefits associated with Cloud-based storage. Therefore, perhaps a better solution is to manage the risks. To do so, consider employing one or more of the following four strategies.

1. Subscribe to business-grade Cloud-based storage services. Most of the consumer-oriented solutions also offer business-grade services. With these types of accounts, the license is held by the organization and the organization maintains control of the Cloud, including who has access to which files and folders, thereby mitigating two of the three risks outlined above.

2. Choose solutions that offer full audit trails. ShareFile, for instance, provides a full audit trail of all activity, including who has accessed folders, uploaded files, and downloaded files. This report shows not only the name of the user, but also the data and time the activity occurred. Of course, this feature helps to determine who has accessed the data and mitigates the risk of data leakages.

3. Ensure that data stored in the Cloud is secured from prying eyes. Some of the Cloud-based providers offer encryption options whereby the organization holds the encryption key; ShareFile is one such option. Others allow users to add their own security measures; Dropbox for example allows users to encrypt their own data using an iTwin encryption key held by the organization, creating what the two companies refer to as a SecureBox.

4. Develop reasonable policies and educate team members. Most team members will seek to comply with a

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Table 1 – Summary of Major Consumer-Oriented Cloud Storage Services

	Amount of Free Storage	Additional Storage Sample Annual Cost	iOS App	Android App	Windows App
Box	5 GB	\$240/50 GB	Yes	Yes	Yes
Dropbox	2 GB	\$99/100 GB	Yes	Yes	Yes
Google Drive	5 GB	\$60/100 GB	Yes	Yes	No
SkyDrive	7 GB	\$50/107 GB	Yes	Yes	Yes
SugarSync	5 GB	\$75/60 GB	Yes	Yes	Yes

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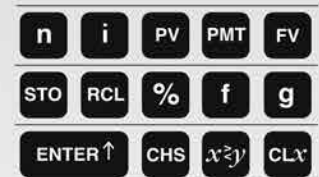
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The Board is seeking a licensed Certified Public Accountant to serve as its Associate Director, Investigations. This position is responsible for:

- Planning and conducting investigations of possible violations of professional and ethical standards, rules, and the law.
- Developing work papers, schedules and documentation of investigations.
- Preparing reports of investigative findings.
- Assisting District Attorneys, the Attorney General's Office and the Board in investigations, litigation, and disciplinary actions. Giving oral testimony at Board and court hearings.
- Coordinating the Compliance Assurance Program (peer review oversight) of the Board.
- Assisting the Executive Director as needed in administrative functions of the office.

Requirements and Special Considerations:

- Must be a licensed CPA.
- Special consideration given for auditing experience.
- Must possess strong communication skills as demonstrated in application letter.
- Should be proficient in Microsoft Office.

A complete job description is available on the State Personnel Board's website.

Applicants must apply via the State Personnel Board website:

www.msph.ms.gov Select "Job Seekers" and search for PA-Associate Director, Investigations. Select this position and complete the online application.

For additional information contact:

**Ransom Jones,
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STOP SELLING

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is the objective of every business development conversation, but it can be wasted time when everything said is questioned. If you are able to get through to them and end up signing them, they can be very difficult to keep happy due to their continued questioning of your service.

The Constant Complainer – This prospect can be extremely frustrating! The Constant Complainer seems to think that you are available only to listen to their complaints about their company, co-workers and lives! Part of a good sales relationship with prospects is to find out what is bothering them. Frustration in a prospect is what drives them to need your service, but it should not turn into ongoing therapy sessions.

These four types of prospects are examples that I watch out for during the sales process. Honestly, there are exceptions to the rule as most prospects are good people looking for your help and expertise. However, it is important to put your focus and energy into the

prospects you feel good about and want to work with. Trust your instincts. If you can identify problem prospects and weed them out in the sales process, they won't become problem clients!

Eric Hunt – As Director of Business Development for Boomer Consulting, Inc., Eric is responsible for the execution of strategic business development goals, building key customer relationships, identifying business opportunities and maintaining extensive knowledge of current market conditions. Eric's primary focus is on the expansion of Boomer Consulting's major service communities and consulting services.

CLOUD STORAGE

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policy if they understand the policy and are educated on the risks of non-compliance. Therefore, develop sound, reasonable policies and educate team members on why they should not introduce unmanaged BYOC into the workplace.

On their own, implementing each of the above four strategies will help the organization realize the benefits of Cloud-based storage, while simultaneously mitigating the risks to prudent and acceptable levels.

Summary

Cloud-based storage is here to stay and is growing at a seemingly exponential level. Its convenience and cost make it an attractive solution for businesses of all sizes. However, failing to manage the risks associated with storing data in the Cloud can potentially cripple an organization. Take steps now to actively manage your Cloud-based storage options before they begin to manage you.

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



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CONTINUING EDUCATION

**NOVEMBER/
DECEMBER 2013**

November 1, 2013

Friday

Jackson

Christ United Methodist
Church

NOT-FOR-PROFIT CONFERENCE

Discussion Leader: PANEL

Cost: Members: \$100 Non-Members: \$100 AICPA Member Discount: \$0

Course Hours: 8:20-4:45

LEVEL: Update CPE Credit: 8 A&A/YB VENDOR: n/a ACRONYM: NPC

COURSE OBJECTIVES AND DESCRIPTION: Please access the MSCPA web site for details and registration information on this conference. www.ms-cpa.org

November 4-5, 2013

Monday-Tuesday

Ridgeland

MSCPA Center

2013 Corporate Income Tax Boot Camp

Discussion Leader: Gordon Meicher, CPA

Cost: Members: \$380 Non-Members: \$530 AICPA Member Discount: \$60

Course Hours: 8:30-4:30

LEVEL: Intermediate CPE Credit: 16 Tax VENDOR: AICPA ACRONYM: CITW

COURSE OBJECTIVES AND DESCRIPTION: This is a comprehensive course geared to guide practitioners through the numerous concepts and rules applicable to income tax accounting, tax return positions and disclosures for C Corporations and S Corporations. Upon completion of this course, participants will be able to discuss: S Corporation Qualifications and Election; C Corporation IRC Section 1244 Stock; Cash and Accrual Accounting Methods; Revenue Recognition Methods; Expensing Versus Capitalization Rules; Depreciation; Inventories; Dividends, Interest and Other Income; Employee Benefit and Retirement Plans; Net Operating Losses; Passive Activities and At-Risk Limitations; Tax Credits; Tax Return Disclosures; Sale of Properties; Other Taxes: AMT, Accumulated Earnings Tax, Personal Holding Company Tax; Tax Payments and Penalties; and more.

November 6-7, 2013

Wednesday-Thursday

Ridgeland

MSCPA Center

1040 Tax Return Update - Developed by Sid Kess: The Latest Individual Tax Developments

Discussion Leader: Gordon Meicher, CPA

Cost: Members: \$380 Non-Members: \$530 AICPA Member Discount: \$60

Course Hours: 8:30-4:30

LEVEL: Intermediate CPE Credit: 16 Tax VENDOR: AICPA ACRONYM: IITW

COURSE OBJECTIVES AND DESCRIPTION: This course summarizes the legislative, judicial and IRS changes for Federal Income Taxes for the current year (through the date of publication) and how these changes impact tax compliance and year-end tax planning for individuals and businesses. Upon completion of this course, participants will be able to discuss: Return Preparation Applications; Strategies for Tax Savings; Business Entity Changes; Income Taxation of Estates and Trusts; IRS Administrative Issues, Compliance and New Forms; Court Cases Settled in the Previous Year that Provide Tax Return Position Authority; IRS Rulings, Procedures and Notices for the Last Year; New Tax Return Disclosures for 2012; and more.

November 12, 2013

Tuesday

Tupelo

BancorpSouth Conf. Cntr.

NEW

Current Issues in Accounting and Auditing: An Annual Update

Discussion Leader: Doug Logan, CPA

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

Course Hours: 8:30-12

LEVEL: Update CPE Credit: 4 A&A VENDOR: Surgent-McCoy ACRONYM: AAU4-3

NEW

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

November 12, 2013

Tuesday

Tupelo

BancorpSouth Conf. Cntr.

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

Discussion Leader: Doug Logan, CPA

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

Course Hours: 1:00-4:30

LEVEL: Intermediate CPE Credit: 4 A&A VENDOR: AICPA ACRONYM: CL4SBAB-2

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

November 12, 2013

Tuesday

Tupelo

BancorpSouth Conf. Cntr.

NEW

Tax Strategies for Businesses: Planning Techniques and Current Issues

Discussion Leader: Harris H. (Trip) Barnes, III JD

Cost: Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Intermediate CPE Credit: 8 Tax VENDOR: AICPA ACRONYM: CHTX-3

NEW

COURSE OBJECTIVES AND DESCRIPTION: Participants will receive a refresher on proven tax saving techniques that have been updated with recent tax legislation and/or court rulings and their effect on particular techniques. Upon completion of this course, participants will be able to discuss: Entity Options; Compensation; Retirement Plans and Deferred Compensation; Passive Activities and At-Risk Issues; Shareholder/Partner Basis; Insolvency and Bankruptcy; Business Losses; Distressed Properties; Tax Credits; Succession Planning; Multi-State Taxation.

November 13, 2013

Wednesday

Tupelo

NEW

BancorpSouth Conf. Cntr.

Nonprofit, State & Local Governments - The Annual Update**Discussion Leader:** Doug Logan, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**NEW****Course Hours:** 8:30-12**LEVEL:** Intermediate **CPE Credit:** 4 A&A YB **VENDOR:** AICPA **ACRONYM:** CL4GNAU

COURSE OBJECTIVES AND DESCRIPTION: Are you current with the latest developments for governmental and non-profit entities? This course has the latest activities of the OMB, GAO, AICPA, GASB and FASB including significant future projects being worked on. Upon completion of this course, participants will be able to discuss: The Latest Single Audit Developments, Effects of Recent Yellow Book Activities, The Latest Standards Issued by the AICPA Relating to Not-for-Profits and Governments, and New Pronouncements Issued or Pending by the FASB and GASB.

November 13, 2013

Wednesday

Tupelo

BancorpSouth Conf. Cntr.

Yellow Book Financial Audits - Using Changes of the 2011 Revised Government Auditing Standards**Discussion Leader:** Doug Logan, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 1:00-4:30**LEVEL:** Basic **CPE Credit:** 4 A&A YB **VENDOR:** AICPA **ACRONYM:** CL4EOYB

COURSE OBJECTIVES AND DESCRIPTION: Do you perform financial audits in accordance with Government Auditing Standards (Yellow Book)? Discover what changed and what stayed the same in the latest revision to Yellow Book. Upon completion of this course, participants will be able to discuss: Yellow Book financial audit standards - general, performance and reporting; CPE requirements; Independence rules; and Peer review requirements.

November 13, 2013

Wednesday

Tupelo

BancorpSouth Conf. Cntr.

Annual Federal Tax Update**Discussion Leader:** Jan Lewis, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 9:00-5:00**LEVEL:** Update **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** PTU-1

COURSE OBJECTIVES AND DESCRIPTION: This course summarizes the legislative, judicial and IRS changes for Federal Income Taxes for the current year (through the date of publication) and how these changes impact tax compliance and year-end tax planning for individuals and businesses. Upon completion of this course, participants will be able to discuss: Return Preparation Applications; Strategies for Tax Savings; Business Entity Changes; Income Taxation of Estates and Trusts; IRS Administrative Issues, Compliance and New Forms; Court Cases Settled in the Last Year that Provide Tax Return Position Authority; IRS Rulings, Procedures and Notices for the Last Year; New Tax Return Disclosures for 2012; and more.

November 14, 2013

Thursday

Tupelo

BancorpSouth Conf. Cntr.

Ethics, Rules & Regulations**Discussion Leader:** Donna Ingram, CPA, CFE, CRFA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 8:30-12**LEVEL:** Update **CPE Credit:** 4 Ethics **VENDOR:** Self-developed **ACRONYM:** ERR-8

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

November 14, 2013

Thursday

Tupelo

BancorpSouth Conf. Cntr.

Fraud in Purchasing and Cash Disbursements Cycles**Discussion Leader:** Donna Ingram, CPA, CFE, CRFA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**Course Hours:** 1:00-4:30**LEVEL:** Basic **CPE Credit:** 4 A&A **VENDOR:** AICPA **ACRONYM:** CL4PCD

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

November 14, 2013

Thursday

Tupelo

BancorpSouth Conf. Cntr.

Revenue Recognition: Getting the New Standard Right**Discussion Leader:** James R. (Jim) Crockett, CPA, DBA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30**Course Hours:** 9:00-5:00**LEVEL:** Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** RRNS-2

COURSE OBJECTIVES AND DESCRIPTION: Revenue recognition has been the cause of audit failures and the focus of corporate abuse and fraud for many years. The new standard on revenue recognition, currently expected to be issued in the first quarter of 2013, is intended to improve the financial reporting of revenues. This course will provide financial professionals with the necessary tools to understand how to work with the new concepts and principles of revenue recognition. In addition, through practical examples, this course will assist you in avoiding revenue recognition traps. Upon completion of this course, participants will be able to discuss: Current Revenue Recognition Challenges; SEC Guidance; Revenue Recognition for Certain Industries; Multiple Deliverable Revenue Arrangements; Proposed Contract Method; Special Issues with Proposed Standard; and more.

November 15, 2013

Friday

Ridgeland

MSCPA Center

BUSINESS VALUATION & LITIGATION SERVICES CONFERENCE**Discussion Leader:** PANEL**Cost:** Members: \$150 Non-Members: \$200 AICPA Member Discount: \$0**Course Hours:** 8:20-4:00**LEVEL:** Update **CPE Credit:** 8 GENERAL **VENDOR:** n/a **ACRONYM:** BVLS

COURSE OBJECTIVES AND DESCRIPTION: Please access the MSCPA web site for details and registration information on this conference. www.ms-cpa.org.

December 3, 2013

Tuesday
Jackson
Hilton Jackson

MISSISSIPPI TAX INSTITUTE

Discussion Leader: PANEL

Cost: Members: \$175 Non-Members: \$175 AICPA Member Discount: \$0

Course Hours: 8:30-5:00

LEVEL: Update **CPE Credit:** 8 Tax **VENDOR:** n/a **ACRONYM:** MTI

COURSE OBJECTIVES AND DESCRIPTION: A detailed agenda will be available on at www.ms-cpa.org several weeks prior to this event.

December 9, 2013

Monday
Hattiesburg
Convention Center

Ethics, Rules & Regulations

Discussion Leader: Donna Ingram, CPA, CFE, CRFA

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

Course Hours: 8:30-12

LEVEL: Update **CPE Credit:** 4 Ethics **VENDOR:** Self-developed **ACRONYM:** ERR-9

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

December 9, 2013

Monday
Hattiesburg **NEW**
Convention Center

Fraud Happened . . . Now What?

Discussion Leader: Donna Ingram, CPA, CFE, CRFA

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

Course Hours: 1:00-4:30

LEVEL: Intermediate **CPE Credit:** 4 A&A **VENDOR:** Self-developed **ACRONYM:** FHNW4-5

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

December 9, 2013

Monday
Hattiesburg
Convention Center

Annual Federal Tax Update

Discussion Leader: Jan Lewis, CPA

Cost: Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Update **CPE Credit:** 8 Tax **VENDOR:** AICPA **ACRONYM:** PTU-2

COURSE OBJECTIVES AND DESCRIPTION: This course summarizes the legislative, judicial and IRS changes for Federal Income Taxes for the current year (through the date of publication) and how these changes impact tax compliance and year-end tax planning for individuals and businesses. Upon completion of this course, participants will be able to discuss: Return Preparation Applications; Strategies for Tax Savings; Business Entity Changes; Income Taxation of Estates and Trusts; IRS Administrative Issues, Compliance and New Forms; Court Cases Settled in the Last Year that Provide Tax Return Position Authority; IRS Rulings, Procedures and Notices for the Last Year; New Tax Return Disclosures for 2012; and more.

December 10, 2013

Tuesday
Hattiesburg **NEW**
Convention Center

New Medicine: Key Issues CPAs Need to Know About the Patient Protection and Affordable Care Act

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

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

Course Hours: 8:30-12

LEVEL: Basic **CPE Credit:** 4 Tax **VENDOR:** Surgent-McCoy **ACRONYM:** NME4-2

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

December 10, 2013

Tuesday
Hattiesburg **NEW**
Convention Center

Maximizing Your Social Security Benefits

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

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

Course Hours: 1:00-4:30

LEVEL: Basic **CPE Credit:** 4 Tax **VENDOR:** Surgent-McCoy **ACRONYM:** SSR4-1

COURSE OBJECTIVES AND DESCRIPTION: As the baby boomer generation approaches retirement, financial and tax planners can expect increased demand for strategies that dovetail Social Security with other retirement objectives. This course provides tax and financial planning professionals with both the background information on the Social Security system and the strategies clients will need in dealing with it. Objectives: Identify who is entitled to retirement benefits and in what amounts; Be aware of what factors must be considered in determining when to take benefits; Understand the impact of reductions or enhancements to the benefits on planning. Topics: Retirement benefits, spousal benefits, at what age to claim social security benefits, coordinating social security benefits with IRA benefits, and more.

December 10, 2013

Tuesday
Hattiesburg
Convention Center

Revenue Recognition: Getting the New Standard Right

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

Cost: Members: \$255 Non-Members: \$330 AICPA Member Discount: \$30

Course Hours: 9:00-5:00

LEVEL: Intermediate **CPE Credit:** 8 A&A **VENDOR:** AICPA **ACRONYM:** RRNS-3

COURSE OBJECTIVES AND DESCRIPTION: Revenue recognition has been the cause of audit failures and the focus of corporate abuse and fraud for many years. The new standard on revenue recognition, currently expected to be issued in the first quarter of 2013, is intended to improve the financial reporting of revenues. This course will provide financial professionals with the necessary tools to understand how to work with the new concepts and principles of revenue recognition. In addition, through practical examples, this course will assist you in avoiding revenue recognition traps. Upon completion of this course, participants will be able to discuss: Current Revenue Recognition Challenges; SEC Guidance; Revenue Recognition for Certain Industries; Multiple Deliverable Revenue Arrangements; Proposed Contract Method; Special Issues with Proposed Standard; and more.

December 11, 2013

Wednesday

Ridgeland

NEW

MSCPA Center

Select Estate and Life Planning Issues for the Middle-Income Client**Discussion Leader:** William F. (Bill) Taylor, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**NEW****Course Hours:** 8:30-12**LEVEL:** Basic **CPE Credit:** 4 Tax **VENDOR:** Surgent-McCoy **ACRONYM:** PMI4-2

COURSE OBJECTIVES AND DESCRIPTION: 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. Discussions will include: More than 20 documents that clients may use; Provisions you need in a will, Trusts and other arrangements for children; Durable powers of attorney for health care and for financial matters; Asset protection strategies; and more. Attend this seminar for personal and professional education.

December 11, 2013

Wednesday

Ridgeland

NEW

MSCPA Center

Maximizing Your Social Security Benefits**Discussion Leader:** William F. (Bill) Taylor, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**NEW****Course Hours:** 1:00-4:30**LEVEL:** Basic **CPE Credit:** 4 Tax **VENDOR:** Surgent-McCoy **ACRONYM:** SSR4-2

COURSE OBJECTIVES AND DESCRIPTION: As the baby boomer generation approaches retirement, financial and tax planners can expect increased demand for strategies that dovetail Social Security with other retirement objectives. This course provides tax and financial planning professionals with both the background information on the Social Security system and the strategies clients will need in dealing with it. Objectives: Identify who is entitled to retirement benefits and in what amounts; Be aware of what factors must be considered in determining when to take benefits; Understand the impact of reductions or enhancements to the benefits on planning. Topics: Retirement benefits, spousal benefits, at what age to claim social security benefits, coordinating social security benefits with IRA benefits, and more.

December 19, 2013

Thursday

Ridgeland

NEW

MSCPA Center

Annual Tax Update**Discussion Leader:** Patrick E. Kelley, CPA**Cost:** Members: \$255 Non-Members: \$330 AICPA Member Discount: \$0**NEW****Course Hours:** 9:00-5:00**LEVEL:** Update **CPE Credit:** 8 Tax **VENDOR:** Pat Kelley **ACRONYM:** ATU**COURSE OBJECTIVES AND DESCRIPTION:****December 20, 2013**

Friday

Ridgeland

NEW

MSCPA Center

IRAs, SEPs, and SIMPLE Plans**Discussion Leader:** Patrick E. Kelley, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**NEW****Course Hours:** 8:30-12:00**LEVEL:** Update **CPE Credit:** 4 Tax **VENDOR:** Pat Kelley **ACRONYM:** PKIRAS4**COURSE OBJECTIVES AND DESCRIPTION:****December 20, 2013**

Friday

Ridgeland

NEW

MSCPA Center

Retirement Plan Distributions**Discussion Leader:** Patrick E. Kelley, CPA**Cost:** Members: \$140 Non-Members: \$180 AICPA Member Discount: \$0**NEW****Course Hours:** 1:00-4:30**LEVEL:** Update **CPE Credit:** 4 Tax **VENDOR:** Pat Kelley **ACRONYM:** PKRPD4**COURSE OBJECTIVES AND DESCRIPTION:****CPE REGISTRATION**

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

(√)	DATE	COURSE TITLE	CITY	LOCATION	* AICPA	NON- MEMS	CPE MEMS	Rec'd Hrs.	Area
()	Nov 1 Fr	NOT-FOR-PROFIT CONFERENCE	Jackson	Christ United Meth.Ch.		100	100	8	A&A;YB
()	Nov 4-5 M-Tu	2012 Corporate Income Tax Boot Camp	Ridgeland	MSCPA Center	*	380	530	16	Tax
()	Nov 6-7 W-Th	1040 Tax Return Update - Devlpd. by Sid Kess: The Latest Ind. Tax Devs.	Ridgeland	MSCPA Center	*	380	530	16	Tax
()	Nov 12 Tu	Current Issues in Accounting and Auditing: An Annual Update	Tupelo	BancorpSo. Conf. Cntr.		140	180	4	A&A
()	Nov 12 Tu	Efficient Small Business Audits: Getting the Best Results for Your Client	Tupelo	BancorpSo. Conf. Cntr.		140	180	4	A&A
()	Nov 12 Tu	Tax Strategies for Businesses: Planning Techniques and Current Issues	Tupelo	BancorpSo. Conf. Cntr.	*	255	330	8	Tax
()	Nov 13 W	Nonprofit, State & Local Governments - The Annual Update	Tupelo	BancorpSo. Conf. Cntr.		140	180	4	A&A;YB
()	Nov 13 W	Yellow Book Financial Audits - Using Changes of the 2011 Revised Standards	Tupelo	BancorpSo. Conf. Cntr.		140	180	4	A&A;YB
()	Nov 13 W	Annual Federal Tax Update	Tupelo	BancorpSo. Conf. Cntr.	*	255	330	8	Tax
()	Nov 14 Th	Revenue Recognition: Getting the New Standard Right	Tupelo	BancorpSo. Conf. Cntr.	*	255	330	8	A&A
()	Nov 14 Th	Ethics, Rules & Regulations	Tupelo	BancorpSo. Conf. Cntr.		140	180	4	Ethics
()	Nov 14 Th	Fraud in Purchasing and Cash Disbursements Cycles	Tupelo	BancorpSo. Conf. Cntr.		140	180	4	A&A
()	Nov 15 Fr	BUSINESS VALUATION & LITIGATION SERVICES CONFERENCE	Ridgeland	MSCPA Center		150	200	8	General
()	Dec 3 Tu	MISSISSIPPI TAX INSTITUTE	Jackson	Hilton Jackson		175	175	8	Tax
()	Dec 9 M	Ethics, Rules & Regulations	Hattiesburg	Convention Center		140	180	4	Ethics
()	Dec 9 M	Fraud Happened . . . Now What?	Hattiesburg	Convention Center		140	180	4	A&A
()	Dec 9 M	Annual Federal Tax Update	Hattiesburg	Convention Center	*	255	330	8	Tax
()	Dec 10 Tu	New Medicine: Key Issues...the Patient Protection & Affordable Care Act	Hattiesburg	Convention Center		140	180	4	Tax
()	Dec 10 Tu	Maximizing Your Social Security Benefits	Hattiesburg	Convention Center		140	180	4	Tax
()	Dec 10 Tu	Revenue Recognition: Getting the New Standard Right	Hattiesburg	Convention Center	*	255	330	8	A&A
()	Dec 11 W	Select Estate and Life Planning Issues for the Middle-Income Client	Ridgeland	MSCPA Center		140	180	4	Tax
()	Dec 11 W	Maximizing Your Social Security Benefits	Ridgeland	MSCPA Center		140	180	4	Tax
()	Dec 19 Th	Annual Tax Update	Ridgeland	MSCPA Center		255	330	8	Tax
()	Dec 20 Fr	IRAs, SEPs, and SIMPLE Plans	Ridgeland	MSCPA Center		140	180	4	Tax
()	Dec 20 Fr	Retirement Plan Distributions	Ridgeland	MSCPA Center		140	180	4	Tax

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

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HAVE YOU MOVED OR CHANGED JOBS?

If so, logon to the member portion of the web site in the upper right corner of the home page, and update your information. www.ms-cpa.org.

REFUND POLICY: You will receive a full refund if cancellation is received seven days prior to the scheduled date of the course. If you cancel within seven days, a fifty percent refund will be given.

Personnel substitutions are permitted.

No refunds are given for same-day cancellations or no-shows.

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What You Need to Know about the Health Care Law

Are you covered? The Affordable Care Act, otherwise referred to as health care reform, requires those who are uninsured to get health insurance. While the start dates of some key programs have been postponed, enrollment in health insurance programs is expected to begin this fall and several other key provisions of the act are becoming effective in the new year.

UNCERTAINTY ABOUNDS

First, if you're confused about the law and its requirements, you're not alone. A new telephone survey conducted for the American Institute of CPAs by Harris Interactive survey found limited knowledge of the healthcare law and its implications. Forty-one percent said they are not at all knowledgeable about the law and another 48% said they were only somewhat knowledgeable. Young people were the least knowledgeable, with nearly half of adults aged 18 to 34 saying they had no knowledge. When it came to knowledge of some of the law's key provisions, only 69% knew that it required uninsured people to get health insurance and just 51% realized that a health insurance exchange would be available in their state, according to a recent USA Today/Pew poll.

THE MARKETPLACE OPENS

What provisions should you focus on right now? Beginning next year, the newly created Health Insurance Marketplace will

provide coverage choices for those who don't have insurance and those who have it but are interested in exploring other, potentially lower-cost options. Consumers in every state can set up an account, file an application and learn if they're eligible for lower-cost premiums or out-of-pocket costs. The plans are offered by private insurers and they cover a set of essential health benefits defined by the law. The Marketplace plans must accept those with pre-existing conditions and cover those conditions. They also can't charge different prices based on gender.

KEY MARKETPLACE DATES

Open enrollment in the Marketplace was set to begin October 1, and coverage can start as early as January 1, 2014. Most employers were required to notify employees of their Health Insurance Marketplace options by October 1. Open enrollment closes on March 31, 2014, and will not open again until October 2014. It's only possible to enroll outside of open enrollment if you have a qualifying life event, such as a marriage, divorce or new baby, certain changes in income or a move to another state.

COVERAGE AVAILABLE NOW

Those who need insurance before January 1 can turn to the government's Plan Finder website for help in locating private insurance plans. Be aware, though, that since many of the

law's provisions aren't yet in effect, consumers may not receive the protections that will be available through the Marketplace, including lower premiums based on income and coverage for pre-existing conditions.

SMALL BUSINESS SHOP MARKETPLACE

If you work for or run a small business, you should be aware of the Small Business Health Options Program (SHOP), a separate marketplace for companies with 50 or fewer full-time employees. Online enrollment for qualifying companies to use the SHOP Marketplace was set to begin October 1, but in late September the Obama administration announced that company owners who want to enroll now would have to mail or fax in their information at least until November 1. Coverage can begin as early as January 1. Once a company selects a plan, employees can sign up online through the SHOP Marketplace. Companies that purchase coverage in 2014 through the SHOP Marketplace may be able to take advantage of a small business health care tax credit of up to 50% of premium costs. If you have questions about whether your company qualifies, be sure to consult your CPA. Note: If you're self-employed without any employees, then you would use the individual Health Insurance Marketplace, not SHOP.

CLASSIFIEDS

continued from page 16

the world. Competitive compensation, excellent benefits and ample opportunity for advancement are offered. Mail resumes in confidence to 188 E. Capitol Street, Suite 1100, Jackson, MS 39201, e-mail bsights@kpmg.com, or visit our website at www.kpmg.com.



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ACCOUNTING & AUDITING UPDATE

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Friday
November 1, 2013
8:00 am - 4:30 pm
Leflore County Civic Center
200 Highway 7 South
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\$100 by October 19, 2013
\$125 after October 19, 2013

-OR-

Friday
November 8, 2013
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StatEROOM
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January 13, 14, & 15, 2014

24 Hours of CPE

Beaver Run Resort & Conference Center

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

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1/13/14 4:10pm - 7:40pm \$100.00
Federal Tax Update
1/14/14 7:30am - 11:00am \$100.00
Accounting & Auditing Update
1/14/14 4:10pm - 7:40pm \$100.00
Tech Update
1/15/14 7:30am - 11:00am \$100.00
Office 2013 and Windows 8
1/15/14 4:10pm - 7:40pm \$100.00
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