

## MSCPA Room Rates for June 24-28, 2020 Convention at Sandestin Released

This year will mark the 35th consecutive year for our Annual Convention and Business Meeting to be held at Sandestin Golf and Beach Resort in Destin, Florida. We've added an additional day of CPE with classes beginning on Wednesday, June 24, and we will be celebrating our Centennial Anniversary at Convention this year! Details about our Centennial Celebration are coming soon – this will be a Convention not to miss!

MSCPA has reserved a block of rooms at the Resort and asks that you book your accommodations directly with Sandestin using our group code 241190. Per our contract with Sandestin, we earn complimentary rooms based on attendance if we meet our minimum percentage for the block. These rooms help

defray the costs of housing the MSCPA staff and our speakers. Even with rising meeting costs we continue to strive to hold a quality family oriented convention without passing the costs to our members.

The resort fees you pay when booking directly with Sandestin are lower than the owner fees and service fees on VRBO and other owner rental sites. Sandestin has room rates starting at \$178. Please help the Society meet our goals!

Your cut-off date for reservations is May 24, after which rooms will be sold on a space-available basis. There are a limited number of each accommodation type in our room block. Book early to get the room you want!

### ACCOMMODATIONS

	DAILY RATE	WEEKLY RATE
BEACHSIDE STUDIO*	\$315.00	\$1,985.00
BEACHSIDE 1 BDRM*	\$370.00	\$2,331.00
BEACHSIDE 2 BDRM*	\$504.00	\$3,176.00
BEACHSIDE 3 BDRM*	\$630.00	\$3,969.00
WESTWINDS 1 BDRM*	\$382.00	\$2,407.00
WESTWINDS 2 BDRM*	\$532.00	\$3,352.00
WESTWINDS 3 BDRM*	\$647.00	\$4,077.00
SOUTHSIDE 2 BDRM	\$337.00	\$2,124.00
SOUTHSIDE 3 BDRM	\$434.00	\$2,735.00
BEACHWALK 2 BDRM	\$320.00	\$2,016.00
BEACHWALK 3 BDRM	\$407.00	\$2,565.00
LUAU 1 BDRM	\$241.00	\$1,519.00
LUAU 2 BDRM*	\$350.00	\$2,205.00
LUAU 3 BDRM*	\$437.00	\$2,754.00

### ACCOMMODATIONS

	DAILY RATE	WEEKLY RATE
LAKESIDE 2 BDRM	\$305.00	1,922.00
LAKESIDE 3 BDRM	\$395.00	2,489.00
BAYSIDE 2 BDRM	\$275.00	1,733.00
VILLAGE - STUDIO	\$219.00	1,380.00
VILLAGE 1 BDRM	\$242.00	1,525.00
VILLAGE 2 BDRM	\$355.00	2,237.00
VILLAGE 3 BDRM	\$444.00	2,798.00
GRAND COMPLEX STUDIO	\$229.00	1,443.00
GRAND COMPLEX 1 BDRM	\$251.00	1,581.00
GRAND COMPLEX 2 BDRM	\$362.00	2,281.00
GRAND COMPLEX 3 BDRM	\$469.00	2,955.00
BAYSIDE AT SANDESTIN-GUEST ROOM	\$178.00	1,121.00
BAYSIDE AT SANDESTIN-1 BDRM	\$222.00	1,399.00

\*Weekly rates consists of a consecutive 7-night stay. If guest departs early, the daily rate will apply. Rates do not include 12% resort fee or 11% taxes.

## MEMORIAL GIFT to the EDUCATION FOUNDATION in memory of

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## Upcoming Conferences

### Banking and Finance Conference

November 4 | Jackson

### Business Valuation & Litigation Support Services Conference

November 14 | Livestream or in Ridgeland

### Not-for-Profit Conference

November 19 | Ridgeland

### Mississippi Tax Institute

December 4-5 | Jackson

## It's Not Too Late to Sign up for CPA Day of Service – November 8



The MSCPA Young CPA Network has planned a day where ALL Society members can give back to their communities in some way. As part of our Centennial celebration, we are also planning a 100 volunteers challenge for our Annual CPA Day of Service. Use the hashtag #100YearsMSCPA if you'd like to post photos to social media of your volunteer activity.

### ALL Society Members Are Invited to Serve

MSCPA has coordinated events statewide including the areas of Metro Jackson, Gulf Coast, Hattiesburg, Laurel, Meridian, Oxford,

Natchez, Cleveland, Starkville, Columbus, Brookhaven, and McComb.

You can sign up as an individual or a group for the CPA Day of Service. Register to participate online on the SIGNUPGENIUS website. Choose the search icon and then search for sign up with the msyoungcpa@ms-cpa.org email address.

There is no deadline for registration, just make sure you register by the event day, Friday, November 8. If you are a returning participant, please sign-up online and wear the t-shirt you received last year.



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by the  
Mississippi Society of  
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JACKSON

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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

### **LAURA LYNN BRUMFIELD**

Linda H. Roberts CPA  
Ocean Springs

### **FORREST DAVIDSON**

Harper, Rains, Knight & Company  
Ridgeland

### **EDWARD E. EASTERLING, JR.**

Mississippi Power Company  
Pass Christian

### **MOISES G. ESPINAL**

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### **CHRISTA A. OWEN**

Mississippi Farm Bureau Casualty Ins.  
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Cooperative Energy  
Petal

### **JENNIFER A. RICHARDS**

Mississippi Power Co.  
Biloxi

### **ALBERT T. SAPPINGTON**

Eaton, Babb & Smith, P.A.  
Tupelo

### **FRANK B. SMITH III**

Cooperative Energy  
Hattiesburg

### **JOHN M. TULL**

Jones and Jones CPAs  
Booneville

## Nominate a Member for MSCPA Officer

The MSCPA Nominations Committee is seeking nominations from the membership for the 2020-2021 candidate slate. Members will elect a Vice-Chairman/Chair-Elect, Treasurer, Secretary and an At-Large Member to the Board of Governors at the 2020 MSCPA Annual Meeting.

### **Nominations should be submitted by December 6.**

You are invited to send names of suggested candidates to Annette Herrin, Nominations Committee Chairman, at [annette@tmhpcas.com](mailto:annette@tmhpcas.com) by December 6.

### **Bylaws Changes Regarding Officer Nominations and Election Process are Now in Effect**

The membership voted and approved the Bylaws changes at the 2019 annual meeting at Sandestin in June as approved by the Board of Governors and recommended by the Long Range Planning Committee regarding the officer nominations and election process. The highlights of the changes include moving from a two candidate ballot to a single candidate, extending the time frame for the membership to submit candidate recommendations to the nominating committee, expanding the nominating committee, and removing floor nominations at the annual meeting. The Bylaws resolution can be found on the MSCPA website on the Policies and Bylaws web page.

### **Qualifications for Candidacy**

In order to support the Bylaws changes, Nominating Committee Policies were also approved. These are to provide guidelines for the committee to ensure the most comprehensive consideration process under the single candidate process.

The qualifications of each candidate shall be considered by the Nominating Committee. While neither the MSCPA Bylaws for the Nominating Committee Policies call for a specific minimum qualification for each position, the Nominating Committee will provide an increased level of consideration to those candidates with the following history of Society involvement:

- Previous service as Secretary or Treasurer of the Board of Directors
- Previous Board of Directors service in a non-officer capacity
- Committee Chairman or Committee Millennial Chairman
- Positions held as a Young CPA Network officer or on the Young CPA Network Board of Directors
- Positions held within Chapter(s)
- Committee membership
- Other involvement or service to the Society

All decisions of the Nominating Committee shall be settled by majority vote, in accordance with the MSCPA Bylaws.

# The Mississippi Society of CPAs, Boards of Accountancy and Others **Unite to Maintain Public Protection as Licensing Standards Put at Risk**

The Mississippi Society of CPAs (MSCPA) has announced its support for the Alliance for Responsible Professional Licensing (ARPL) - a new coalition of advanced professions focused on educating policymakers and the public about the importance of rigorous professional licensing standards.

The MSCPA will support AICPA and NASBA and other ARPL members as they seek to educate and inform lawmakers around the country of the need to maintain standards for highly complex, technical professions like the CPA profession that have a clear impact on the public's fiscal health and welfare. The coalition was formed to ensure the voices and concerns of the advanced professions are heard amid the growing debate around licensing.

Karen Moody, President and CEO of the MSCPA states, "ARPL fills a critical need in bringing a unique perspective to this debate. ARPL will represent our concerns and bring this critical perspective to the larger debate while carrying this message in our state."

"Weakening professional licensing standards on a state-by-state basis will destroy the confidence in qualifications and

completely disrupt existing mobility models for advanced professions like ours," warned Barry Melancon, CPA, CGMA, President and CEO of AICPA. "Employers will be less inclined to accept out-of-state licenses if some states have rigorous requirements and others have weak requirements. The result: it will become more difficult for CPAs to move and maintain their careers across states."

You can learn more about ARPL and the importance of professional licensing by visiting the group's newly launched website <http://www.responsiblelicensing.org>.

ARPL members include the American Institute of Architects (AIA), American Institute of CPAs (AICPA), the American Society of Civil Engineers (ASCE), the Council of Landscape Architectural Registration Boards (CLARB), the National Association of State Boards of Accountancy (NASBA), the National Council of Architectural Registration Boards (NCARB), the National Council of Examiners for Engineering and Surveying (NCEES) and the National Society of Professional Engineers (NSPE).

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## Member News



Mississippi Society of CPAs President/CEO, **Karen Moody, CPA**, was recently elected to serve on the Board of Directors for the Mississippi Society of Association Executives and will begin her two-year term in 2020. Pictured here with MSAE Executive Director, Amy Wilson.



# SPECIAL DISCOUNTS

As a member of the only statewide organization for CPAs in Mississippi, you have access to an array of member benefits including special discounts from MSCPA partners to help you make the most of your profession.

## Becker+

### Becker Professional Education

MSCPA is a preferred provider of Becker Professional Education. Visit our exclusive portal ([www.becker.com/mississippicpaspp](http://www.becker.com/mississippicpaspp)) to access CPA Exam Review courses and product available at preferred pricing for MSCPA members. Or contact Karen Whitaker, Account Manager, at 504-875-8690 or email [kwhitaker@becker.com](mailto:kwhitaker@becker.com).



### Brown & Brown Insurance

MSCPA has partnered with Brown & Brown Insurance to offer members competitive rates on a variety of insurance products and services that may not be available anywhere else. For further information, please contact Stormy Blair at 1-888-503-5547 ext. 3886 or email [sblair@bb-asp.com](mailto:sblair@bb-asp.com).



### CPACharge

CPACharge is the preferred payment solution for members of the MSCPA. With CPACharge, you can easily accept credit cards with the convenience of online and mobile payments. Their secure solution is quick and simple, allowing clients to make payments anytime, anywhere. MSCPA members receive 3 months free when you open an account. Visit [www.cpacharge.com/ms-cpa](http://www.cpacharge.com/ms-cpa) or call 844.352.4705 to speak with a Certified Payment Specialist.



### Gleim Publications, Inc.

MSCPA has partnered with Gleim Publications, Inc. to offer our members a 20% discount on Gleim materials including Certified Public Accountant, Certified Internal Auditor, Certified Management Accountant, and Enrolled Agent study material. Visit our partnership program webpage - the discount will show in your cart. For more information, please contact Martha Willis at [mpwillis@gleim.com](mailto:mpwillis@gleim.com).



Mississippi Federal  
CREDIT UNION

### Mississippi Federal Credit Union

Mississippi Federal Credit Union is the official credit union for Society members. The partnership allows MSCPA members to also become a member of Mississippi Federal Credit Union and take advantage of their full line of financial products and services which range from basic savings to investment services. To become a MFCU member, visit [msfcu.us](http://msfcu.us) or contact Justin Harmon, VP of Business Development, at 601-351-9919 or [jharmon@msfcu.us](mailto:jharmon@msfcu.us).



### Office Depot

MSCPA members can save up to 75% on over 93,000 products at Office Depot/OfficeMax. Great for your printing, cleaning and office needs. Shop online or in any Office Depot or OfficeMax store. Enjoy FREE next-day delivery on online orders over \$50! Visit [officediscounts.org/mscpa](http://officediscounts.org/mscpa) to shop online or print off a FREE Store Purchasing Card. For further assistance with an account, contact Wayne Ruppert at [Ruppert@officedepot.com](mailto:Ruppert@officedepot.com) or call 855-337-6811 ext: 12785.



Payroll • HR • Retirement • Insurance

### Paychex

MSCPA has partnered with Paychex, a leading provider of integrated human capital management solutions for payroll, HR, retirement, and insurance services, to offer one month of free services to all MSCPA members. For further information, please contact Lauren Martinez at 985-381-3386 or email [lmartinez@paychex.com](mailto:lmartinez@paychex.com).

### UPS shipping discounts

Save up to 36% on UPS® shipping services including domestic ground services and international export and import services, plus domestic and international express delivery services.

To enroll and start saving, visit [savewithups.com/mscpa](http://savewithups.com/mscpa) or call 1-800-MEMBERS (1-800-636-2377), M-F, 8 a.m. – 6 p.m. EST.



Wolters Kluwer

### CCH Books from Wolters Kluwer

MSCPA and Wolters Kluwer have partnered together to offer you exclusive discounts on CCH® tax and accounting books, including U.S. Master Tax Guide®, Internal Revenue Code, Income Tax Regulations, the State Tax Handbook, and more! Save 40% off select Books of the Month and 25% off all other CCH® Publications. Visit [cchgroup.com/members/ms-cpa](http://cchgroup.com/members/ms-cpa) and use our new promo code (USTP-BLYY5687) or contact Tammy Nickels, Association Account Manager at 877-571-2841 or [tammy.nickels@wolterskluwer.com](mailto:tammy.nickels@wolterskluwer.com).

# A Fiscal Reality: MSCPA and AICPA Support the Fiscal State of the Nation Resolution

The U.S. government's balance sheet indicates that, over time, the nation had an accumulated deficit (from annual shortfalls) of \$21.5 trillion as of September 30, 2018. To put that in perspective, if you made a stack of 21.5 trillion \$1 bills, you would be able to go to the moon and back more than three times.

Recently, Representatives Kathleen Rice (D-N.Y.) and Andy Barr (R-K.Y.) introduced the Fiscal State of the Nation resolution, H. Con. Res. 68, with 103 additional co-sponsors. It provides "for a joint hearing of the Committees on the Budget of the House of Representatives and the Senate to receive a presentation from the

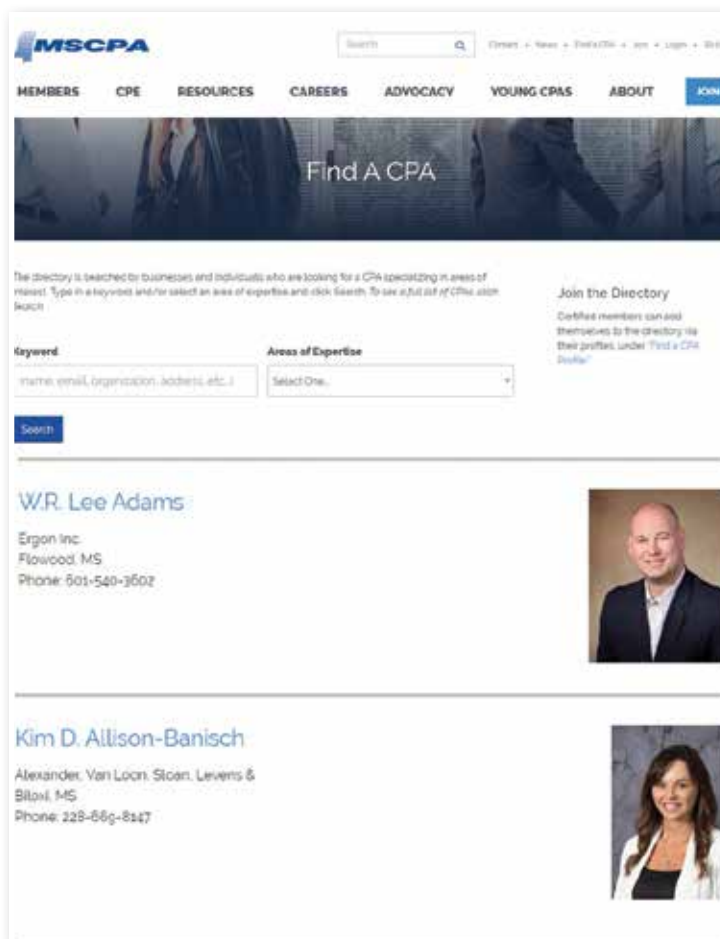
Comptroller General of the United States regarding the audited financial statement of the executive branch." The resolution ensures that members of Congress are made aware of the information in the federal financial statements and helps them to better understand how current and/or future policy may affect the nation's long-term fiscal health.

"We thank Representatives Rice, Barr and the more than 100 other members who signed on to this important resolution," said MSCPA President/CEO Karen Moody. "Their leadership will help ensure that key policymakers are focused on some of the most important aspects of the consolidated

financial statements, including financial and stability measures. The Society is encouraging each Mississippi Member of the U.S. House to also support this resolution by becoming a co-signer."

AICPA also supports the Fiscal State of the Nation resolution. The profession believes that the consolidated federal financial statements and the Government Accountability Office (GAO)'s audit report provide valuable information on the financial condition of the federal government, and that policymakers should consider this information while making key decisions.

## Join the MSCPA "Find a CPA" Directory



The screenshot shows the MSCPA website's 'Find a CPA' directory. At the top, there's a navigation bar with links for MEMBERS, CPE, RESOURCES, CAREERS, ADVOCACY, YOUNG CPAs, ABOUT, and a JOIN button. Below this is a large banner with the text 'Find A CPA'. Under the banner, there's a search section with a text input for 'keyword' (placeholder: 'name, email, organization, address, etc.'), a dropdown for 'Areas of Expertise' (placeholder: 'Select One'), and a 'Search' button. To the right of the search section is a 'Join the Directory' link. Below the search section, two CPA profiles are displayed. The first profile is for W.R. Lee Adams, with a photo, name, company (Ergon Inc.), location (Flowood, MS), and phone number (501-540-3602). The second profile is for Kim D. Allison-Banisch, with a photo, name, company (Alexander, Van Loon, Stoen, Levens & Biloxi, MS), and phone number (228-666-8147).

The MSCPA frequently receives phone calls and inquiries from people looking for a CPA. We direct those inquiries to the Find a CPA directory on our website ([www.ms-cpa.org/find-a-cpa](http://www.ms-cpa.org/find-a-cpa)). The directory is searched by businesses and individuals who are looking for a CPA specializing in areas of interest. There you can type in a keyword and/or select an area of expertise and click Search. Or you can just click Search to see a full list of CPAs.

Certified members can add themselves to the directory by updating their MSCPA online member profile. Visit the MSCPA website ([www.ms-cpa.org](http://www.ms-cpa.org)) and login with your email and password. Then go to the Update My Profile page under Members ([www.ms-cpa.org/membership/my-profile](http://www.ms-cpa.org/membership/my-profile)). Near the bottom of your profile, select "Display my profile in the Find A CPA directory."

We encourage members to also upload a picture for your profile and select area of expertise on your profile page for better searchability.

## Scheduled Board Meetings

**Friday, December 6, 2019**  
**The Capital Club, Jackson**

**Thursday, May 7, 2020 at 3:15**  
**MSCPA Training Center, Ridgeland**

▼ DETACH HERE ▼

Form **4868**Department of the Treasury  
Internal Revenue Service (30)**Application for Automatic Extension of Time To  
Sell My Accounting Practice**

OMB No. 1545-0074

**2018**

For calendar year 2018, or other tax year beginning , 2018, and ending , 20

**Part I**

1 Your name

Jesse

Address

26742

City, town

Mississippi

State

CA

ZIP code

92692

2 Your social

354-79

For Privacy A

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Act Notice, see page 4.

**Part II Individual Income Tax**

4 Estimate of total tax liability for 2018 . . . \$

5 Total 2018 payments . . . . .

6 **Balance due.** Subtract line 5 from line 4

(see instructions) . . . . .

7 Amount you're paying (see instructions) . . . ▶

8 Check here if you're "out of the country" and a U.S.

citizen or resident (see instructions) . . . . . ▶ ☐

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 . . . . . ▶ ☐

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Form **4868** (2018)

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## Meet the Firms

Members of the MSCPA Young CPA Network visited with college accounting students at the Jackson State University Meet the Firms event Wednesday, October 2. MSCPA President/CEO

Karen Moody and MSCPA Young CPA Network President Shannon Adams gave a presentation and introduced students to the Society.



*Pictured from left to right: Shannon Adams, YCPA President; Karen Moody, MSCPA President/CEO; Jack Kaler, YCPA Vice-President; and Phillip Chu, YCPA Treasurer.*



*Pictured from left to right: Dr. Sheila Porterfield, JSU Associate Dean of the College of Business; Lori Liddell, MSCPA Member and JSU Instructor; Donald McWilliams, MSCPA Member and former JSU Instructor; Dr. Wayne Nix, MSCPA Member and JSU Associate Professor.*



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# Chapter News

## Gulf Coast Chapter

The MSCPA Gulf Coast Chapter had a chapter Lunch & Learn September 26 at the Knight Nonprofit Center in Gulfport. Ashley Edwards, CEO of the Gulf Coast Business Council, presented on the state of the Gulf Coast economy.

The next Gulf Coast CPE Event will be October 25 at the Gulfport-Biloxi International Airport.



## Southeast Chapter

The MSCPA Southeast Chapter had a chapter CPE luncheon September 17 at Cooperative Energy's Conference Center in Hattiesburg. CPE speaker, Auditor Shad White, provided an update on recent developments from the Mississippi Office of the State Auditor.



## Delta Chapter

### CPE Dinner

Tuesday, November 5, 2019  
Cotton House Hotel, Cleveland

Registration will begin at 5:30pm, dinner will be served at 6:00pm, and the program will begin at 7:00pm. MSCPA President/CEO Karen Moody, MSCPA Chairman Donna Bruce, and MSCPA Young CPA Network President Shannon Adams will be in attendance to kick off MSCPA's Centennial Celebration.

**CPE Topic:** The Nitty-Gritty CPA Summary of Tax and Reporting Changes Impacting Nonprofits

**Guest Speaker:** Charles Lindsay, CPA

- Email [lisasandifer@sayle-sandifer.com](mailto:lisasandifer@sayle-sandifer.com) for registration information

## Northeast Chapter

### Tax Update

Tuesday and Wednesday, November 5-6, 2019  
BancorpSouth Conference Center, Tupelo

This Farmer/Nunnallee Tax Update Seminar will provide an overview of tax law changes since prior year for both individuals and businesses. Registration begins at 7:30am and the seminar begins at 8:00am each day.

- Two days/16 CPE Credits: \$325 per person
- One day/8 CPE Credits: \$225 per person
- Lunch will be provided
- Featuring CPE Instructor, Bruce A. McGovern, CPA, JD
- Email [nemscpa@gmail.com](mailto:nemscpa@gmail.com) for registration information

# Conferences

## Health Care Services Conference

More than 50 professionals gathered in person and via livestream for our annual Health Care Services Conference on September 27 at the MSCPA Training Center in Ridgeland. MSCPA would like to thank our sponsors: BKD CPAs & Advisors, GranthamPoole, Harper, Rains, Knight & Company, and HORNE LLP.

*Health Care Services Committee Chairperson, Julia Jesuit; Millennial Chair, Walker Roberts.*





# BANKING AND FINANCE CONFERENCE

**Monday, November 4, 2019**

Hilton—Jackson, MS | Member Price: \$200 | CPE Credit: 8 A&A

7:45-8:25 a.m.	Registration/Breakfast	12:45-1:35 p.m.	<i>Economic Update</i> <b>Dudley Carter</b> , Vining Sparks
8:25-8:30 a.m.	Opening Remarks	1:35-2:25 p.m.	<i>Current Trends in Bank Internal Audit</i> <b>Mike Thomas</b> , Crowe
8:30-10:00 a.m.	<i>Asset/Liability Management and Funding and Liquidity Risk Management</i> <b>Mike Delisle</b> , FTN Financial	2:25-2:40 p.m.	Networking Break w/ Exhibitors
10:00-10:15 a.m.	Networking Break w/ Exhibitors	2:40-3:30 p.m.	<i>Cybersecurity</i> <b>Johnny Sanders</b> , BKD
10:15-11:45 a.m.	<i>Non-Qualified Deferred Compensation Arrangements</i> <b>David Shoemaker &amp; James Taylor</b> , NFP/ Equias	3:30-4:20 p.m.	<i>Accounting &amp; Auditing Update</i> <b>Scott Adams</b> , Silas Simmons
11:45-12:45 p.m.	Lunch	4:20-4:30 p.m.	Door Prize Giveaways Conference Adjourns
12:20-12:40 p.m.	<b>Keynote</b> <b>Ben Cayson &amp; Bailey Hartel</b> , MS Dept of Banking & Consumer Finance	4:30 p.m.	Networking Social in Foyer

Visit [www.ms-cpa.org](http://www.ms-cpa.org) to register.

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# Business Valuation and Litigation Support Services Conference

Thursday, November 14, 2019

Livestream & In Person at the MSCPA Training Center, Ridgeland

Member Price: \$185

This specialized event is for CPAs, business valuation specialists, appraisers and other financial professionals who perform business valuation and litigation services.

8:00am – 8:30am	Registration/Breakfast
8:30am – 8:40am	Opening Remarks
8:40am – 9:30am	<b><i>Reasonable Compensation: A Deeper Dive</i></b> Kevin Yeanoplos, Brueggeman and Johnson Yeanoplos, P.C.
9:30am – 10:20am	<b><i>Personal v. Practice Goodwill</i></b> Kevin Yeanoplos, Brueggeman and Johnson Yeanoplos, P.C.
10:20am – 10:30am	Break
10:30am – 11:20am	<b><i>Anatomy of a Deal Gone Bad</i></b> Vanessa Claiborne, Chaffe & Associates, Inc. Nene Gianfala, Chaffe & Associates, Inc.
11:20am – 12:10pm	<b><i>Business Valuation for Pass-Through Entities Post-TCJA</i></b> Vanessa Claiborne, Chaffe & Associates, Inc.
12:10pm – 1:00pm	Lunch
1:00pm – 2:40pm	<b><i>Complex Forensic Accounting Applications</i></b> Robert Vance, Forensic & Valuation Services, PLC
2:40pm – 2:50pm	Break
2:50pm – 3:40pm	<b><i>Fraud in Business Valuations</i></b> Vanessa Claiborne, Chaffe & Associates, Inc. Nene Gianfala, Chaffe & Associates, Inc.
3:40pm – 4:30pm	<b><i>Hot Topics/Case Law Update</i></b>
4:30pm	Door Prize Giveaways/Conference Adjourns



Featured Speaker: Kevin R. Yeanoplos, CPA/ABV/CFF, ASA

Visit [www.ms-cpa.org](http://www.ms-cpa.org)  
to register

## Retire Now – Not Later!

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

Contact Charles Lindsay at Matthews, Cutrer & Lindsay, P.A.

at 601-898-8875 or email [clindsay@mcclcpa.net](mailto:clindsay@mcclcpa.net).



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LINDSAY, P.A.

CERTIFIED PUBLIC ACCOUNTANTS

# Not-for-Profit Conference

Tuesday, November 19, 2019

Hilton-Jackson | Price: \$100

7:30 – 8:20	Registration and Breakfast	Imperial Hall
8:20 – 8:30	Welcome/Introductions/Housekeeping	
<b>GENERAL SESSIONS</b>		Salon A
8:30 – 9:30	<b><i>Impact of the New Tax Law</i></b> Ed Chaney	
9:30 – 10:20	<b><i>Segregation of Duties and Internal Controls</i></b> Alissa Klein, BKD	
10:20 – 10:40	Networking break with exhibitors	
<b>CONCURRENT SESSIONS</b>		
10:40 – 11:30	<b><i>Compliance and Budgets</i></b> Andreason Brown	Salon A
	<b><i>Impact Assessment: Managing to Outcomes</i></b> Dan Prater, BKD	Amphitheatre I & II
	<b><i>UBTI Issue on Parking Costs</i></b> Charles Lindsay, MCL	Cabana
11:30 – 12:50	Lunch	Salon B
	<b><i>MS Tax Credit on Giving to Qualified Foster Care Charitable Orgs and to Endowment Funds</i></b> <b><i>Overview of MS Alliance of Nonprofits and Philanthropy</i></b> Jo G. Prichard, Mississippi Alliance of Nonprofits and Philanthropy Sammy Moon, Executive Director, Mississippi Alliance of Nonprofits and Philanthropy	
	<b>Ask the Experts Panel:</b> Ed Chaney, Alissa Klein, Andreason Brown, Dan Prater, and Charles Lindsay	
12:50 – 1:00	Transition to Concurrent Sessions	
1:00 – 1:50	<b>CONCURRENT SESSIONS</b>	
	<b><i>Compliance and Budgets</i></b> Andreason Brown	Salon A
	<b><i>Impact Assessment: Managing to Outcomes</i></b> Dan Prater, BKD	Cabana
	<b><i>Revenue Recognition &amp; Leases</i></b> Alissa Klein, BKD	Amphitheatre I & II Contracts
1:50 – 2:05	Networking break with exhibitors	
2:05 – 2:55	<b>CONCURRENT SESSIONS</b>	
	<b><i>Best Financial Practices</i></b> Andreason Brown	Salon A
	<b><i>UBTI Issue on Parking Costs</i></b> Charles Lindsay, MCL	Cabana
	<b><i>Revenue Recognition &amp; Leases</i></b> Alissa Klein, BKD	Amphitheatre I & II
2:55 – 3:05	Transition to General Session	
3:05 – 4:20	<b>GENERAL SESSION</b> <b><i>Leadership Communications</i></b> Dan Prater, BKD	Salon A
4:20	Closing Remarks	

Visit [www.ms-cpa.org](http://www.ms-cpa.org)  
to register



# MSCPA ANNUAL MISSISSIPPI TAX INSTITUTE

WEDNESDAY & THURSDAY, DECEMBER 4-5, 2019 | HILTON-JACKSON

This event is designed to help you manage and thrive in this ever-changing tax environment. Discover how the latest changes will affect your clients or company. Learn new tax-saving strategies and enhance your skills and knowledge so you can provide outstanding results.

## NEW! Optional Afternoon Session on Wednesday

### WEDNESDAY, DECEMBER 4

#### Optional Session

1:00pm – 4:30pm with a Happy Hour sponsored by Butler Snow LLP

CPE Credits: 4 / CLE Credits: 3.33

Price \$100

#### Conference Topics:

- Update on 199A Regulations
- Tax Controversy Update
- Multistate Tax Update
- Federal Income Tax Update
- Exempt Organizations
- Estate and Gift Tax Planning
- Mississippi Tax Credits
- Eggshell Tax Audits
- Probate Code Changes
- Divorce & Prenuptial Issues
- Opportunity Zones
- MDOR Update

### THURSDAY, DECEMBER 5

#### Mississippi Tax Institute

8:30am – 4:30pm

CPE Credits: 8 / CLE Credits: 6.67

Price: \$200

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E: [sblair@bb-asg.com](mailto:sblair@bb-asg.com)

# UPCOMING CPE

Acronym: ..... BFC  
 Vendor: ..... MSCPA  
 Level: ..... Update  
 CPE Credit: ..... 8 Gen  
 City: ..... Jackson  
 Location: ..... Hilton-Jackson  
 M / N: ..... \$200 / \$275  
 Time: ..... 8:30am-4:30pm

## 11/4/2019 Banking and Finance Conference Tues Speaker: Various

This conference highlights information and the latest developments in the banking industry. Don't miss this opportunity to receive key updates from top regulators, engage in discussions with bank leaders and firm partners, and prepare for the year ahead. Visit the MSCPA website at [www.ms-cpa.org](http://www.ms-cpa.org) for a complete agenda.

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



## 11/6/2019 IN PERSON: Construction Contractors: Accounting, Wed Auditing, and Tax Speaker: Andrew 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, auditing, and taxation. Find out what 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, auditing, and tax changes for the construction industry.

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



## 11/6/2019 LIVESTREAM: Construction Contractors: Accounting, Wed Auditing, and Tax Speaker: Andrew 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, auditing, and taxation. Find out what 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, auditing, and tax changes for the construction industry.

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



## 11/11/2019 IN PERSON: AICPA's Federal Tax Update Mon Speaker: Jan Lewis

Save time and keep current on the latest tax developments! This comprehensive course covers all legislative, judicial, and IRS developments of the past year with a focus on implementation and compliance. Discover how to effectively and confidently complete tax planning and compliance engagements. Cover current developments affecting individuals (including those regarding income, deductions and losses, tax calculations, individual credits, filing matters), business entities (including those regarding S Corporations and their shareholders, C Corporations, partnerships), estates and trusts, retirement plans, and more. Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law.

Acronym: ..... PTUW-1  
 Vendor: ..... AICPA  
 Level: ..... Update  
 CPE Credit: ..... 8 Tax  
 Location: ..... Online  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



## 11/11/2019 LIVESTREAM: AICPA's Federal Tax Update Mon Speaker: Jan Lewis

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Acronym: ..... BVLS  
 Vendor: ..... MSCPA  
 Level: ..... Update  
 CPE Credit: ..... 8 Gen  
 City: ..... Ridgeland  
 Location: ..... MSCPA Center  
 M / N: ..... \$185 / \$260  
 Time: ..... 8:30am-4:30pm

## 11/14/2019 IN PERSON: Business Valuation and Litigation Support Thurs Services Conference Speaker: Various

This specialized event is for CPAs, business valuation specialists, appraisers and other financial professionals who perform business valuation and litigation services. Visit the MSCPA website at [www.ms-cpa.org](http://www.ms-cpa.org) for a complete agenda.



Acronym: ..... BVLSW  
 Vendor: ..... MSCPA  
 Level: ..... Update  
 CPE Credit: ..... 8 Gen  
 Location: ..... Online  
 M / N: ..... \$185 / \$260  
 Time: ..... 8:30am-4:30pm



**11/14/2019 LIVESTREAM: Business Valuation and Litigation**  
**Thurs Services Conference**  
**Speaker: Various**

This specialized event is for CPAs, business valuation specialists, appraisers and other financial professionals who perform business valuation and litigation services. Visit the MSCPA website at [www.ms-cpa.org](http://www.ms-cpa.org) for a complete agenda.

Acronym: ..... NPC  
 Vendor: ..... MSCPA  
 Level: ..... Update  
 CPE Credit: ..... 8 Gen  
 City: ..... Jackson  
 Location: ..... Jackson – Hilton  
 M / N: ..... \$100 / \$100  
 Time: ..... 8:30am-4:30pm

**11/19/2019 Not-for-Profit Conference**  
**Tues Speaker: Various**

Get the industry-specific insights you need to maintain a strong organization for you or your clients and get informed about unique challenges facing not-for-profit organizations at this annual event. Visit the MSCPA website at [www.ms-cpa.org](http://www.ms-cpa.org) for a complete agenda.

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



**11/20/2019 AICPA's Federal Tax Update**  
**Wed Speaker: Jan Lewis**

Save time and keep current on the latest tax developments! This comprehensive course covers all legislative, judicial, and IRS developments of the past year with a focus on implementation and compliance. Discover how to effectively and confidently complete tax planning and compliance engagements. Cover current developments affecting individuals (including those regarding income, deductions and losses, tax calculations, individual credits, filing matters), business entities (including those regarding S Corporations and their shareholders, C Corporations, partnerships), estates and trusts, retirement plans, and more. Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law.

Acronym: ..... CORU-2  
 Vendor: ..... AICPA  
 Level: ..... Update  
 CPE Credit: ..... 8 A&A  
 City: ..... Tupelo  
 Location: ..... BancorpSouth Conf. Ctr.  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**11/20/2019 Annual Update and Practice Issues for Preparation,**  
**Wed Compilation, and Review Engagements**  
**Speaker: Jeffrey Lieman**

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

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



**11/21/2019 Reviewing Pass-Through Tax Returns: What Are You Missing**  
**Thurs Speaker: Robert Thelen**

Join us as we discuss the common errors practitioners make on pass through tax returns that are often missed by review staff. The intent is to sharpen skills for reviewers by examining case studies and discussing issues where additional information from the client may be warranted and areas of tax law where proper treatment requires additional analysis and information. Multiple issues will be discussed and both partnership and S corporation returns will be covered. Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law. This course follows a highly illustrative case study format to increase participant comprehension and retention.

Acronym: ..... DAAN-2  
 Vendor: ..... AICPA  
 Level: ..... Basic  
 CPE Credit: ..... 8 A&A  
 City: ..... Tupelo  
 Location: ..... BancorpSouth Conf. Ctr.  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**11/21/2019 Analytics and Big Data for Accountants**  
**Thurs Speaker: Jeffrey Lieman**

Analytics is the new force driving business. Tools have been created to measure program impacts and ROI, visualize data and business processes, and uncover the relationship between key performance indicators, many utilizing the unprecedented amount of data now flowing into organizations. In this course you will discuss leading-edge topics in analytics and finance in a session that is packed with useful tips and practical guidance that you can apply immediately.

Acronym: ..... MTI  
 Vendor: ..... MSCPA  
 Level: ..... Update  
 CPE Credit: ..... 8 Tax / 12 Tax with Optional Session  
 City: ..... Jackson  
 Location: ..... Jackson - Hilton  
 M / N: ..... \$200 / \$300 with Optional Session  
 Time Wed: ..... 1:00pm-4:30pm  
 Time Thurs: ..... 8:30am-4:30pm

**12/4-12/5/19 Mississippi Tax Institute**  
**Wed-Thurs Speaker: Various**

This event is designed to help you manage and thrive in this ever-changing tax environment. Discover how the latest changes will affect your clients or company. Learn new tax-saving strategies and enhance your skills and knowledge so you can provide outstanding results. Visit the MSCPA website at [www.ms-cpa.org](http://www.ms-cpa.org) for a complete agenda.

**NEW!** The MSCPA Taxation Committee has added an afternoon Optional Session on Wednesday, December 4, 2019, prior to the Conference. Select the Optional Session when registering for an additional 4 hours of CPE.

Acronym: ..... MTI  
 Vendor: ..... MSCPA  
 Level: ..... Update  
 CPE Credit: ..... 8 Tax / 12 Tax with Optional Session  
 City: ..... Jackson  
 Location: ..... Jackson - Hilton  
 M / N: ..... \$200 / \$300 with Optional Session  
 Time Wed: ..... 1:00pm-4:30pm  
 Time Thurs: ..... 8:30am-4:30pm

**12/4-12/5/19 Mississippi Tax Institute**  
**Wed-Thurs Speaker: Various**

This event is designed to help you manage and thrive in this ever-changing tax environment. Discover how the latest changes will affect your clients or company. Learn new tax-saving strategies and enhance your skills and knowledge so you can provide outstanding results. Visit the MSCPA website at [www.ms-cpa.org](http://www.ms-cpa.org) for a complete agenda.

**NEW!** The MSCPA Taxation Committee has added an afternoon Optional Session on Wednesday, December 4, 2019, prior to the Conference. Select the Optional Session when registering for an additional 4 hours of CPE.

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



**12/9/2019 IN PERSON: Hottest Tax Topics for 2019**  
**Mon Speaker: William F. (Bill) Taylor**

Two things you can count on are important new tax developments and economic, social, and demographic trends that turn out to have important tax implications. This course, newly authored by Margaret F. Suralik, CPA/ABV, ASA, explores the hottest tax planning topics that will impact you and your clients. These are areas of income taxation that can change every year and affect many of your clients. Learn how to better advise your clients by offering them the latest tax saving strategies. Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law.

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



**12/9/2019 LIVESTREAM: Hottest Tax Topics for 2019**  
**Mon Speaker: William F. (Bill) Taylor**

Two things you can count on are important new tax developments and economic, social, and demographic trends that turn out to have important tax implications. This course, newly authored by Margaret F. Suralik, CPA/ABV, ASA, explores the hottest tax planning topics that will impact you and your clients. These are areas of income taxation that can change every year and affect many of your clients. Learn how to better advise your clients by offering them the latest tax saving strategies. Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law.

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



**12/10/2019 IN PERSON: Advanced Tax Strategies for LLCs**  
**Tues and Partnerships Speaker: William F. (Bill) Taylor**

What works best for your client? Learn the pros and cons of the LLC, General Partnership, Limited Partnership, and Limited Liability Partnership by focusing on planning and potential tax traps. A review of distinct advantages of these entities is coupled with an examination of the risk members and partners face if they do not have a solid tax plan to minimize their exposure. In addition, we will explore some of the more intricate rules and regulations of these entities so you can move your working knowledge of partnership and LLC taxation beyond the basics. Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law.

Acronym: ..... DTTW  
 Vendor: ..... AICPA  
 Level: ..... Advanced  
 CPE Credit: ..... 8 Tax  
 Location: ..... Online  
 M / N: ..... \$275 / \$345  
 AICPA Member Discount: ..... \$30  
 Time: ..... 8:30am-4:30pm



**12/10/2019 LIVESTREAM: Advanced Tax Strategies for LLCs**  
**Tues and Partnerships Speaker: William F. (Bill) Taylor**

What works best for your client? Learn the pros and cons of the LLC, General Partnership, Limited Partnership, and Limited Liability Partnership by focusing on planning and potential tax traps. A review of distinct advantages of these entities is coupled with an examination of the risk members and partners face if they do not have a solid tax plan to minimize their exposure. In addition, we will explore some of the more intricate rules and regulations of these entities so you can move your working knowledge of partnership and LLC taxation beyond the basics. Course materials include the impact of the Tax Cuts and Jobs Act of 2017 (TCJA) tax reform law.

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



**12/11/2019 Real-World Fraud in Today's Small-to-Medium - Sized Entities**  
**Wed Speaker: Donna Ingram**

This course uses hands-on case studies based on real-world frauds to help participants carry out their financial statement fraud responsibilities. Auditors and corporate accounting and finance professionals in small-to medium-sized entities will find this course relevant. The course includes an overview of the auditor's responsibilities related to financial statement fraud. In addition, the course includes information relevant to management's responsibility for fraud and internal controls. Cases address revenue recognition, various financial statement manipulations, purchasing fraud, and other common areas of interest.



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- Southeast of Birmingham CPA grossing \$445K
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- North Alabama EA grossing \$630K
- West of Montgomery, AL CPA grossing \$1 million

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- Wilson County, TN CPA Firm – Gross \$305k – SOLD
- NE MS Tax/Bookkeeping – Gross \$850k – SOLD

Contact Kathy Brents, CPA CBI today for a free no-obligation consultation, 501-514-4928 or visit our website, [www.AccountingBizBrokers.com](http://www.AccountingBizBrokers.com).

**HELP CLIENTS SELL BUSINESS:** Are any of your clients thinking about selling their businesses to fund retirement? You've been a trusted advisor for decades, so you want to be able to provide them with helpful resources during the exit stage. Let Good Work Advisors LLC, run by fellow CPA Josh Norris, be that resource. We are a full-service business brokerage firm that can help your client get the best value for their business--their life's good work. Visit [GoodWorkAdvisors.com](http://GoodWorkAdvisors.com) or email [josh@corkernandnorris.com](mailto:josh@corkernandnorris.com).

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