



## MSCPA Centennial Volume Wins OUTSTANDING BOOK AWARD

The Academy of Accounting Historians, a section of the American Accounting Association, annually gives an award for the best book published in the area of accounting history. The **Barbara D. Merino Award for Excellence in Accounting History Publication** is given to recognize the author or authors of the best book on an accounting historical topic published in a given year. The authors each receive a plaque and share a cash award in the amount of \$1000. The winning publication is based upon the selection of an awards committee established by the leadership of the Academy. The 2022 award was given for the publication of MSCPA Centennial History: A Century of CPAs in Mississippi, 1920-2020.

Authors **Dale L. Fleisher** and **Annette Pridgen** travelled to San Diego, California, where on July 31 they were presented the award at the American Accounting Association's annual meeting. The third

coauthor, **James W. Davis**, was not able to make the trip, but his plaque and check will be mailed to him.

The 217-page hard-bound volume was published by the MSCPA in June 2020 to celebrate the Society's centennial. An extensive name index includes the names of approximately 1,500 Mississippi CPAs who have played a role in the organization's history. Almost 500 photos also appear throughout the book. A short biography appears for each of the past presidents who have served the Society throughout its history.

Members who have not already received a copy may pick up one at the Society's office in Ridgeland or email Noma Gillis at [ngillis@ms-cpa.org](mailto:ngillis@ms-cpa.org) to request one be mailed. A digital copy appears on the Ole Miss Library website (the National Library of the Accounting Profession) at: [https://egrove.olemiss.edu/acct\\_inst/193/](https://egrove.olemiss.edu/acct_inst/193/).

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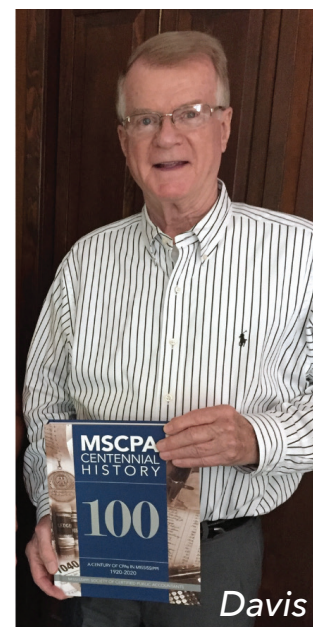
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**JOHN PAUL STOCKWELL**  
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By

**HAROLD CORBIN**  
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Included in the photo with Dale Fleisher and Annette Pridgen are the Academy of Accounting Historians President-Elect Stephen Fafatas and President Yvette Lazdowski.



Davis



*Published  
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306 Southampton Row  
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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.*

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## NOMINATE AN Outstanding Educator

The MSCPA Awards, Education & Scholarships Committee is seeking nominations for the Outstanding Educator Award for 2022-2023.

Each year the Committee requests nominations for selection of an educator who has made significant contributions as an accounting instructor. That individual is honored during the MSCPA Annual Business Meeting at Convention in June.

Nominations should be submitted in writing by **October 1** to be considered by the Committee. Send your nominations to Outstanding Educator, c/o MSCPA, 306 Southampton Row, Ridgeland, MS 39157 to the attention of Shawn Mauldin, Committee Chairman.



# Member News

## Flesher Awarded Life Membership in the Academy of Accounting Historians

**TONYA K. FLESHER** was honored at the recent American Accounting Association (AAA) Annual Meeting in San Diego by being awarded life membership in the Academy of Accounting Historians. She is a past president (1993) of the Academy.

The awarding of a Life Membership is rare and is based on the following criteria. These criteria are not an exhaustive list but are intended to provide guidance to the Selection Committee in its deliberations and decisions:

- international profile and recognition – the individual should have a global profile and not one simply within his/her country;
- the quality, importance and originality of the individual's research program;
- the scholar's scope of work, publication record in various academic journals and edited volumes;
- his/her active participation in the academy (in the generic sense and not only the Academy of Accounting Historians), including contributions to the field as journal editor, editorial board member, conferences, etc.;

- the individual's work and efforts to popularize history and accounting history, including editing and publication of works, and efforts to bring accounting history's past into the present through the publication of old documents or records or the re-publication of forgotten texts; and
- the individual's participation in the training of doctoral students.

Tonya is the Arthur Andersen Alumni Professor and Dean Emerita of the Patterson School of Accountancy at the University of Mississippi. She holds a BS from Ball State University (1971), an MA from Appalachian State University (1975), and a Ph.D. from the University of Mississippi (1979). She is the author of eight books, including one of the best-selling tax textbooks in the country, and more than 80 articles. She was the recipient of the Mississippi Society of CPAs 1995 Outstanding Educator of the Year Award. Dr. Flesher is a past president of the Academy of Accounting Historians and has served on numerous committees of the AICPA and other professional organizations. Dr. Flesher received the University of Mississippi's 1986

Burlington Northern Award as the outstanding faculty member campus wide. She has been a departmental editor for two accounting journals. Dr. Flesher was formerly the dean of the School of Accountancy at the University of Mississippi. She was the first woman to hold an academic deanship in the then 140-year history of the University. In 2020, she was the recipient of the AICPA's Distinguished Achievement in Accounting Education Award as the top professor nationwide.

Included in this photo with Tonya Flesher are Stephen Fafatas, President-Elect and Yvette Lazdowski, President.



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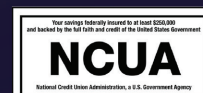
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## MDOR ISSUES GUIDANCE ON ERC AND GEER FUNDS

The Mississippi Department of Revenue (MDOR) issued the following statements below to MSCPA regarding Mississippi tax treatment of the Employee Retention Credit (ERC) and the Governor's Emergency Education Response Fund (GEER). Please note the taxability of the ERC credit itself differs from what MDOR previously advised MSCPA in a meeting. Wages are deductible, but the credit is taxable under current law.

Regarding GEER funds, if the funds were received in GEER I, the advances/grants are not taxable. Most of the money was distributed in round 1 from the CARES Act, the Consolidated Appropriations Act of 2021 and American Rescue Plan which were covered in our bills. However, funds received from the Coronavirus Response and Relief Supplement Appropriations Act (CRRSA) round 2 are currently taxable. These funds were not covered in our legislation.

### MDOR Guidance Statement: Employee Retention Credit (ERC):

Mississippi does not have statutory authority to follow the federal Employee Retention Credit. Therefore, the full amount of wages paid to employees are deductible for state purposes. Miss Admin Code Title 35.III.5 Chapter 7 provides that Mississippi does not recognize federal regulations under Section 280 or 44B regarding tax credits allowed for work incentive programs or the employment of certain new employees.

The amount of the federal credit received is considered taxable income for Mississippi purpose as there is no exemption available for it.

### Governor's Emergency Education Response Fund (GEERS):

Legislation passed in 2020 and 2021 excluded amounts received as advances and / or grants from the CARES Act, the Consolidated Appropriations Act of 2021 and the American Rescue Plan. It does not include the Coronavirus Response and Relief Supplemental Appropriations Act (CRRSA). The CARES Act provided the majority of the funding for GEER Funds but the CRRSA Act provided some additional funding. These supplemental funds are identified as GEER II and are not exempt from income.

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# Responsibilities to Clients

## When a CPA Firm is Merging or Acquired

Arthur J. (Kip) Dellinger, Jr., CPA

It is not news to CPAs and their firms that the profession began undergoing an enormous consolidation a few years ago, which is expected to accelerate over the next several years. This is a result of many factors — retirement planning, monetizing of client values, staggering advances in technology, market share and services expansion, among many other reasons.

The consolidation typically takes the form of mergers and acquisitions and sometimes a combination of both. And it involves not only very large firms merging — or bringing in firms of significant size in a local or regional market — but also includes local firms and even sole practitioners combining or acquiring practices of retiring practitioners.

When a proposed merger or acquisition transaction is undertaken, questions arise about the professional obligations and responsibilities of the **target firm**, including any required communication pertaining to its clients' confidential information and the transfer of client files to the successor entity.

### Professional Standards — American Institute of Certified Public Accountants (AICPA)

Two provisions of the AICPA's Code of Professional Conduct address merger and acquisition issues.

The first and most significant provision is ET § 1.400.205 – Transfer of Files and Return of Client Records in Sale, Transfer, Discontinuance or Acquisition of a Practice<sup>1</sup> — and additionally interpreted in [Frequently Asked Questions: General Ethics](#) (updated March 18, 2022).

ET § 1.400.205 provides that when a CPA's practice is sold or transferred to

another firm and the seller/transferor will no longer retain an ownership in the successor practice, each client must receive a written request for consent to transfer its files to the successor firm. The notification may state if a negative response is not provided within 90 days, permission will be assumed by the successor to transfer the files. Moreover, the files should not be transferred until client permission is obtained or the 90 days period expires. Additionally, the acquiring firm is equally responsible for compliance with these requirements. However, there are conflicting requirements discussed below when tax information will be transferred in a sale of a practice.

#### *Equity vs. Non-Equity Transferors*

The Frequently Asked Questions addressing “Transfer of client files in a merger” clarify that if a target CPA firm's owner(s) become equity partners, the client notice requirements do not apply — regardless of the percentage of ownership.

Alternatively, if the target CPA firm's owner(s) are admitted as non-equity partner(s), the client written notice requirements discussed earlier will apply.

There may also be hybrid situations — for example, when the target CPA firm's partner, equity or non-equity, “own” clients. In that event, each client situation must be evaluated and treated in a manner consistent with these rules pertaining to equity and non-equity owners in successor entity.

Conflict of Interest Considerations (ET § 1.700.010)

In some circumstances, the parties must consider possible conflicts of interest. For example, when two CPA firms are

combining and each represent industry competitors, or when a practice being acquired includes a competitor of a client of the acquiring firm (where one or both clients would prefer not to share the same CPA firm) can create a conflict-of-interest issue. How such matters are handled should be specified in the agreement to the contemplated merger or acquisition.

### Accountancy Laws

CPAs and CPA firms are regulated by Boards of Accountancy in the states and other geographical locations where they practice. When one or both firms are pursuing an acquisition or merger, the parties should ascertain which Boards have jurisdiction and determine the applicable jurisdictional rules that apply to the contemplated transaction. Fortunately, the overwhelming number of jurisdictions adopt (specifically or impliedly) the ethics rules of the AICPA (for example, [Rule 58 of the California Board of Accountancy](#)).

The California Board of Accountancy recently proposed a specific rule regarding CPA firms' duties when there was a sale or transfer of a licensee's practice (Proposed Rule Sec. 54.2) but withdrew the proposal in February 2022. This presumably means California continues to default to the AICPA provisions.

### CPAs Must Comply with Onerous Treasury Regulation Requirements

Internal Revenue Code Section § 7216 (“the Code” or “7216”) is a criminal statute regulating tax preparers with regards to their “uses” and “disclosure” of a taxpayer's return information. The Code is very general and provides that Treasury issue regulations governing the application of Code Section § 6713, which provides civil monetary penalties for similar violations.

Its application is governed by 7216 regulations and the provision is more likely to be asserted by the Internal Revenue Service (“the IRS” or “Treasury”) because proving a criminal violation has a much higher bar than meeting a civil violation.

Treasury has issued three regulations under Sec. § 7216 – Reg. Sec. 1.301.7216-1, 2 and 3. These regulations should be reviewed annually by firm leadership to ensure continued compliance with their requirements, IRS Section 7216. Regulation 1.301.7216-1 addresses, definitions and the respective penalties associated with violations of the Code. The significant portion states that “taxpayer information” is any information pertaining to the taxpayer. For example, the use or disclosure of the taxpayer’s name can result in a violation and the regulation is not limited to financial information or identification numbers.

The second regulation, 1.302.7216-2, is key to a firm’s practice because it sets forth those “uses and disclosures” that a tax preparer may make or engage in **without prior written approval** of the taxpayer, whose information is to be used or disclosed. One of the uses may be to compile a list for solicitation of tax return preparation business (1.302.7216-2(n)). While the CPA firm, as a compiler of the list, is not generally permitted to transfer it, an exception is made when there is a transfer in combination with the sale or disposition of the firm. The typical due diligence conducted prior to the proposed sale of the CPA’s tax preparation business will not represent a transfer of the list if: the CPA selling the firm has a written confidentiality agreement with the acquiring firm that expressly prohibits any use or disclosure of information permitted to be on the list for any purpose other than the purchase of the firm’s business.

If the use or disclosure is not contained in the second regulation, then strict adherence must be made with the third regulation, which sets forth specific, detailed requirements for obtaining the

taxpayer’s prior written approval.

Regulation Section § 301.7216-2(d)(1) permits, without taxpayer approval, the use and disclosure of taxpayer information among preparers and processors of a firm regarding tax return preparation and related-tax advice. Therefore, when a merger takes place between two firms and there is continuity of personnel from the target firm in the successor firm, the IRS can be expected to apply the same principles as the AICPA to the transaction. When the target firm’s owners do not retain an equity interest in the successor firm, an abundance of caution would be to comply with the stricter request for permission requirements set forth in Reg. Sec. 301.7216-3. Unfortunately, the request for consent does not specify the number of days within which the client must respond, which can be problematic for the successor firm, instead requiring affirmative consent must be given by the taxpayer before a transfer takes place.

The regulations do not provide for an acquiror’s quality review of tax returns in connection with a sale or merger of a CPA firm’s practice. This is different than the AICPA rules and consequently, the CPA firm whose clients’ returns will be the subject of a review, must obtain client permission for the use and disclosure of their return information when contemplating a sale or merger.

This may present challenges to the two firms, as the acquiror will be limited in identifying particular returns and therefore may request to review it (because they cannot have access to any return information in the selection process). Or, the target firm would have to seek permission from every tax return client to enable the acquiring firm to make its selection. The parties must find a satisfactory solution to the quandary — perhaps a random selection from a list identified (only by numbers) that correspond to an alphabetized master retained by the target firm.

It is critically important to remember in merger and acquisition transactions that the requirements under tax laws must be complied with in addition to complying with the CPA profession’s ethical standards.

*Arthur J. (Kip) Dellinger, Jr., CPA,  
provides services as an expert in the areas of  
CPA tax practice regulatory discipline and  
malpractice matters.*

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<sup>1</sup> ET1.400.205



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# CHAPTER NEWS

## CENTRAL CHAPTER

The MSCPA Central Chapter held a lunch and learn meeting on July 19, at the MSCPA Training Center in Ridgeland. CPE speakers were Ken Newburger of the MS Medical Marijuana Association and Jan Lewis of Haddox Reid Eubank Betts. MSCPA Central Chapter members also elected new Officers and Board of Governors representatives.

### *Officers:*

President: Ed Simmons, Benefit Administration Services, Ltd.  
 Vice-President/Programs: Mary Margaret White, HORNE  
 Vice-President/Membership: Lydia Windham, Municipal Energy Agency of MS  
 Secretary: Emily Harrington, MS Department of Transportation  
 Treasurer: Steven Eilders, Haddox Reid Eubank Betts PLLC

### *Incoming Board of Governors Representatives for two-year terms:*

Wil Crawford, FORVIS  
 Penny Godwin, Watkins and Co, CPAs  
 Virginia Morris, Haddox Reid Eubank Betts PLLC

### *Returning Board of Governors Representatives with one year left on term:*

Domina Kaler, Haddox Reid Eubank Betts PLLC  
 Ed Simmons, Benefit Administration Services, Ltd.  
 Rob Zischke, HORNE



*Left to Right: Virginia Morris, Emily Harrington, Steven Eilders, Wil Crawford, Penny Godwin, Mary Margaret White, Lydia Windham, (not pictured Ed Simmons)*





## SOUTHWEST CHAPTER

The MSCPA Southwest Chapter held its annual CPE Day on July 19th at the Natchez Grand Hotel. President Caitlin Goodman reports that over 30 people attended the meeting. They heard from CPE speakers Forrest A. Johnson III of Ameriprise Financial Services, Peyton Cavin of Silas Simmons, and Donna Ingram, CPA.



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

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# ANNUAL HEALTH CARE SERVICES CONFERENCE

**THURSDAY,  
SEPT. 22,  
2022**

*Livestream and In Person at the MSCPA Training Center in Ridgeland*

This event is designed to meet the specific interests of CPAs and financial professionals who provide services to hospitals, physician practices, and long-term care facilities.

Co-sponsored by the Mississippi Chapter of the HFMA

**Credits: 8 | Cost: \$215 | Register online** at [www.ms-cpa.org](http://www.ms-cpa.org)

## **AGENDA**

**8:00 AM - 8:30 AM**

**Registration & Continental Breakfast**

**8:30 AM - 9:30 AM**

**HFMA National Healthcare Regulations and Trends**

*Shawn Stack, Director of Perspectives & Analysis HFMA*

**9:30 AM - 10:45 AM**

**Rural CFO/CEO Panel**

*Covington-Gregg Gibbes, CEO*

*MS Rural Health Alliance MHA - Chad Netterville, Executive*

*Neshoba - Lee McCall, CEO*

*OCH - Jim Jackson, CEO*

*Ed Tucker - Moderator*

**10:45 AM - 11:00 AM**

**Morning Break**

**11:00 AM - 12:00 PM**

**Medicaid Update**

*Drew Snyder, Executive Director*

*MS Division of Medicaid*

**12:00 PM - 12:45 PM**

**Lunch Break**

**12:45 PM - 2:00 PM**

**Health System CEO/CFO Panel**

*Baptist Health - Chris Anderson, COO*

*St. Dominic - Dave Estorge, VP-BD & Integration*

*UMMC - Jeff Grimsley, CFO*

*Ken Dulaney - Moderator*

**2:00 PM - 3:15 PM**

**Health Care Fraud**

*Daniel Champney, FBI*

**3:15 PM - 3:30 PM**

**Afternoon Break**

**3:30 PM - 4:30 PM**

**MHA: Legislative Update**

*Richard Roberson, General Counsel & VP of Policy and State*

*Advocacy MHA*

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# MSCPA Annual NOT-FOR-PROFIT Conference

LIVESTREAM AND IN PERSON  
at the MSCPA Training Center in Ridgeland

## Agenda

8:30am - 10:00am	GAAP v. Form 990 Reporting Differences and Functional Expense Allocations	Brian Yacker, Baker Tilly Tax
10:00am - 10:10am	Break	
10:10am - 11:00am	Not-for-Profits and Board Training	Charles Lindsay, Matthews, Cutrer & Lindsay
11:00am - 11:50am	Private Foundations Primer	Brian Yacker, Baker Tilly Tax
11:50am - 12:35pm	Lunch Break	
12:35pm - 1:05pm	MS SOS Charities Division Update and Q&A	Tanya Webber, Assistant Secretary of State for the Charities Division
1:05pm - 1:35pm	MS Alliance of Nonprofits - Program Overview	Charles Lindsay, Matthews, Cutrer & Lindsay
1:35pm - 2:25pm	Fantastic 4: Four Ways to Maximize Your Digital Marketing Strategy	Stacey Gaines, HORNE
2:25am - 2:35am	Break	
2:35pm - 3:25pm	Panel Discussion on Preparing for a Not-For-Profit Audit	Bill Felder, Harper, Rains, Knight & Company, P.A. Wil Crawford, FORVIS Debbie Walker, MS Home Corporation Gina Nelson, MS Home Corporation Angie Sumrall, Canopy Allison Rooker, Canopy
3:25pm - 4:15pm	What NFPs Should Know about Cybersecurity	Cerone F. "Cy" Sturdivant, FORVIS

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.

Register Online at  
**WWW.MS-CPA.ORG**

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TUESDAY  
**SEPT  
20  
2022**

**CREDITS: 8**

**COST : \$125**





# MSCPA ANNUAL INDUSTRY CONFERENCE

**FRIDAY, OCTOBER 20, 2022**

**CREDITS:**

**08**

**COST:**

**\$180**

**REGISTER ONLINE AT  
WWW.MS-CPA.ORG**

**LIVESTREAM AND IN PERSON  
AT THE MSCPA TRAINING CENTER IN RIDGELAND**

This event is designed to approach critical topics from the perspective of a CFO, controller, manager or accountant from the inside of a business or industry position.

# MSCPA ANNUAL ACCOUNTING EDUCATION CONFERENCE

**FRIDAY  
OCTOBER 28, 2022**

This annual event updates accounting educators on accounting industry trends and equips them to help their students succeed.

**LIVESTREAM AND IN PERSON** at the MSCPA Training Center in Ridgeland

**CREDITS: 8 COST: \$100 REGISTER ONLINE: WWW.MS-CPA.ORG**

# Firms Are Using the NEW .CPA Domain to SUPERCHARGE Their Online Presence

By Chris Comer, Director of Operations, CPA.com

Put a good idea in the hands of CPAs, and they'll find innovative ways to make it even better. That's exactly what's happening right now with the new .cpa web domain.

When .cpa was launched in fall of 2020, there were plenty of good reasons for firms to take notice. For starters, it's a practical way to enhance client trust – when clients see a firm with a .cpa domain they know it's a firm they can trust rather than some questionable fly-by-night operation. That's because only individually-licensed CPAs and licensed CPA firms can obtain a .cpa domain through a verification process managed by CPA.com, a subsidiary of the AICPA. There's also the issue of security: When firms adopt the .cpa domain, they're better able to protect firm and client data from phishing and other security threats, since top-level domains like .cpa are more resistant to fraud than the less-regulated, more commonly used .com.

And then there are the brand benefits. When it comes to using the .cpa domain to support their brand and marketing strategies, firms have been steadily innovating, creating new opportunities and advantages that weren't immediately obvious. As a result, in only a short time the profession has seen a host of new domain strategies take flight – and they're just getting started.

If you're wondering whether your firm should make the move to a .cpa domain, here are some domain-based brand strategies (in addition to the benefits of heightened security and trust) that your peers in the profession are already putting to work.

## **“Let's use this as an opportunity to rebrand”**

Rebranding is perhaps the most obvious opportunity presented by the .cpa domain. If your firm feels tethered to a name or web

address that it had outgrown, but couldn't find a better option in the overcrowded realm of .com domains, the .cpa domain allows the firm to start fresh. Stuck with JonesCPA.com even though Jones retired five years ago? This is a rare chance to get the website address that fits the firm's present and future ambitions.

## **“We need a shorter domain!”**

As the internet matured, all the good domains were quickly snatched up. If you wanted to own the JonesCPA.com address, it was probably already held by some other Jones CPA, or by a squatter who bought it in the hopes of selling it at a higher price. This led to some very long domains that are virtually impossible for clients to remember. The .cpa domain offers the opportunity for firms to secure shorter, more memorable domains – a simple and effective boost to your brand and marketing efforts. That's why Texasbased DWG CPA jumped at the opportunity to secure the dwg.cpa url, which is easy for clients and prospects to remember and supports the firm's branding efforts.

“Over ten years ago, we secured dwgcpatx.com for our newly launched firm,” said Managing Director Darrell Groves, CPA, CGMA. “But as our firm grew and matured over the years, it became clear that our domain name was just too long and hard to remember. When we thought about the value of marketing our firm, and of having a shorter url, it didn't take us long to decide we needed to make the move to a .cpa domain,” he said.

## **“Let's target specific markets with our domain”**

Specialization continues to grow in importance as a tool for firms to distinguish themselves from the competition and tap into a deep well of clients. For example, some firms focus





























on serving the restaurant industry, or manufacturers. Others specialize in certain types of services – taxes, SOC audits, or client accounting services (CAS), to name only a few. Some focus on segments such as startups. Some firms distinguish by geography and are looking to market themselves within specific towns, regions, or states. Many firms have already started to adopt domain names that reflect their specific niche, making it easier for clients to find them in online searches and reinforcing their commitment to specific markets. Acosta Tax & Advisory's MiamiBeach.cpa is one example of this hyper-targeted strategy in action, helping the firm appear prominently in the online search results of prospective clients looking for a CPA in the area. Another is SOCAudit.cpa. Guess what they specialize in?

Firms can even heighten the impact of these urls through a multiple domain strategy. By leveraging website redirects, they can advertise market-specific or geotargeted url's that stand out from the competition and then redirect web browsers to a primary website. This enables firms to have a primary website, such as Cromer.cpa, but to advertise catchy, branded domains such as TaxGuru.cpa or BayArea.cpa, while not having to manage multiple websites.

\* \* \*

The .CPA domain hasn't been available for very long, so right now is the best time to secure your firm's top pick. It's easy to do – just visit **Domains.cpa**. You'll find all the details you need to inform your decision, including a **whitepaper**, case studies, and video interviews with leaders at firms who have already made the switch. In these short videos, these leaders share their tips and best practices for transitioning to a .cpa URL.

## 2022 CPE at A Glance

BEGIN	DAY	NEW	COURSE TITLE	LOCATION	LIVESTREAM	AICPA	MEM	NON MEM	CPE HRS	RECOM'D CATEGORY
Sep 14	W	New	Livestream Only: A&A To Go Series: SAS 142 Audit Evidence	Online			59	99	1.5	A&A
<b>Sep 20</b>	<b>T</b>		<b>Not-for-Profit Conference</b>	<b>MSCPA Center</b>			<b>125</b>	<b>125</b>	<b>8</b>	<b>Gen</b>
Sep 21	W	New	Livestream Only: Hot Tax Topics with Art Auerbach	Online			79	119	2	Tax
<b>Sep 22</b>	<b>Th</b>		<b>Health Care Services Conference</b>	<b>MSCPA Center</b>			<b>215</b>	<b>215</b>	<b>8</b>	<b>Gen</b>
Sep 27	T		Annual Update for Controllers	MSCPA Center		30	285	355	8	Gen
Sep 28	W	New	Critical Business Risks — Identifying Your Blind Spots	MSCPA Center		30	285	355	8	Gen
Oct 12	W	New	Livestream Only: A&A To Go Series: Avoiding Auditor Bias	Online			59	99	1.5	A&A
Oct 13	Th		Estate and Life Planning Issues for the Middle-Income Client	MSCPA Center			285	355	8	Tax
Oct 19	W	New	Livestream Only: Hot Tax Topics with Art Auerbach	Online			79	119	2	Tax
<b>Oct 20</b>	<b>Th</b>		<b>Industry Conference</b>	<b>MSCPA Center</b>			<b>180</b>	<b>255</b>	<b>8</b>	<b>Gen</b>
Oct 25	T		Succession Planning for the Small Business Owner:	MSCPA Center			160	200	4	Gen
Oct 25	T	New	Key Partnership and S Corporation Tax Planning Strategies	MSCPA Center			160	200	4	Tax
Oct 26	W		Reviewing Individual Tax Returns: What Are You Missing?	MSCPA Center			160	200	4	Tax
Oct 26	W		Reviewing Partnership Tax Returns: What Are You Missing?	MSCPA Center			160	200	4	Tax
<b>Oct 28</b>	<b>F</b>		<b>Accounting Education Conference</b>	<b>MSCPA Center</b>			<b>100</b>	<b>100</b>	<b>8</b>	<b>Gen</b>
Oct 31	M	New	Intermediate Individual Taxation	MSCPA Center		30	285	355	8	Tax
Nov 1	T	New	Individual Tax Fundamentals	MSCPA Center		30	285	355	8	Tax
Nov 2	W		S Corporations: Key Issues, Compliance, and Tax Strategies	MSCPA Center		30	285	355	8	Tax
Nov 9	W	New	Livestream Only: A&A To Go Series: 2022 SSARS Update	Online			59	99	1.5	A&A
Nov 11	Fr	New	Oil and Gas Taxation: Issues and Update	MSCPA Center			295	365	8	Tax
<b>Nov 17</b>	<b>Th</b>		<b>Business Valuation and Litigation Services Conference</b>	<b>MSCPA Center</b>			<b>185</b>	<b>260</b>	<b>8</b>	<b>Gen</b>
<b>Dec 7-8</b>	<b>W-Th</b>		<b>Mississippi Tax Institute</b>	<b>TBD</b>			<b>400</b>	<b>400</b>	<b>16</b>	<b>Tax</b>
Dec 12	M	New	Livestream Only: Hot Tax Topics with Art Auerbach	Online			79	119	2	Tax
Dec 13	T	New	Livestream Only: A&A To Go Series: Applying the New Leasing	Online			59	99	1.5	A&A
Dec 14	W		Ethics, Rules, and Regulations	MSCPA Center			160	200	4	Ethics
Dec 14	W		Guide to Payroll Taxes and 1099 Issues	MSCPA Center			160	200	4	Tax
Dec 15	Th		AICPA's Annual Federal Tax Update	MSCPA Center		30	285	355	8	Tax
Jan 23	M	New	Livestream Only: Hot Tax Topics with Art Auerbach	Online			79	119	2	Tax

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## 2022-2023 DUES NOTICE REMINDER

MSCPA MEMBERSHIP YEAR JULY 1, 2022 THROUGH JUNE 30, 2023

### ANNUAL DUES

Annual dues billed is based on your prior year member level. If your member level has changed, please contact Stephanie Edwards, MSCPA Director of Finance, at 601-856-4244 to make an online payment. Dues not paid by October 1 are past due and must include a \$25.00 late fee. After October 1, members who have not paid their dues will no longer receive member benefits including discounts on CPE.

#### To Pay Online

Go to <https://www.ms-cpa.org/membership/pay-dues>.

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Firm admins can print or pay firm employees dues.  
Contact Noma Gillis, [ngillis@ms-cpa.org](mailto:ngillis@ms-cpa.org), to be added as a firm admin.





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