

JOHN PAUL STOCKWEL Jackson, MS Died June 19, 2022

MEMORIAL GIFT

To the EDUCATION FOUNDATION In memory of

> JOHN PAUL STOCKWELL Jackson, MS By JIM KOERBER Hattiesburg, MS

BRYAN HOLT APPLEWHITE Madison, MS By Roy WARD Jackson, MS

## 2022-2023 DUES CAN BE PAID ONLINE

Members can pay dues online for MSCPA membership year July 1, 2022 through June 30, 2023. Go to www. ms-cpa.org/ and login with your email and password. Then go to the Pay Dues page (under Members) to pay your dues for 2022-2023. If you need to change your member level, please contact Stephanie Edwards, MSCPA Director of Finance, at 601-856-4244.

Firm admins can also print or pay your firm employees dues. Contact Noma Gillis, ngillis@ms-cpa.org to be added as a firm admin.

Dues notices will go in the mail in August to the members who have not yet paid online. Payment is due upon receipt of the statement. 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.



## 2022-2023 MSCPA Officers



Scott Christian Natchez *Chairman* 



Jerry Goolsby Jackson Vice-Chairman/Chairman-Elect



Yale Murphy Ridgeland Secretary



Anita Goodrum Eupora *Treasurer* 



Sim Mosby Natchez At-Large Board Member

Newly elected officers for the 2022-2023 MSCPA fiscal year are Scott Christian, Chairman; Jerry Goolsby, Vice Chairman/Chairman-Elect; Yale Murphy, Secretary; and Anita Goodrum, Treasurer. Sim Mosby was elected to a three-year term as an at-large member of the Board of Governors. Officers were elected June 25 during the Annual Business Meeting at Sandestin Golf and Beach Resort.





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E-MAIL ADDRESS:

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### **OFFICERS**

*Chairman* Ricky Bullock TUPELO

Vice Chairman/Chairman-Elect Scott Christian NATCHEZ

> *Treasurer* Wil Crawford MADISON

Secretary Shanell Watson CLINTON

**President/CEO** Karen Moody RIDGELAND

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

**TOMMY CHAMBLEE** Hardy Reed LLC *Tupelo, MS*  MARCIA HOUSER Gainspoleitti & Associates *Cleveland, MS* 

## **Member** News Crawford Announced as Partner for FORVIS



**WIL CRAWFORD** has been named partner at FORVIS, LLP effective June 1, 2022. FORVIS officially launched on June 1 following the merger of BKD, LLP and Dixon Hughes Goodman, LLP thereby expanding a national platform, deepening industry expertise, and creating greater resources and more innovative advisory services to best serve clients' needs. He joined BKD's Jackson office in 2006.

Wil has more than 16 years of experience providing audit and accounting services to telecommunications, governmental, nonprofit, higher education, and commercial clients. Wil also serves as the nonprofit and governmental industry leader for the Jackson office. He is a summa cum laude graduate of Mississippi State University with a Bachelor of Science in Accounting and a Master of Professional Accountancy.

Wil has served the Society in many roles and just completed a term as MSCPA Treasurer and Executive Committee member. He is currently the Millennial Chair of the Long Range Planning Committee and a member of the Central Chapter. Wil has served as President of the Young CPA Network and Chairman of the Governmental Accounting and Auditing Committee. He was awarded the Silas M. Simmons Bronze Medal for the 2007 CPA Exam and was the 2015 winner of the MSCPA Rising Star Award in its inaugural year. Wil frequently presents at MSCPA conferences and classes where he earns excellent reviews.

He is also a member of the AICPA and the AGA and was previously a reviewer for the United States and Canada's Government Finance Officers Association's Certificate of Achievement for Excellence in Financial Reporting Program. Wil also previously served as Treasurer on the board of directors of the Central Mississippi Chapter of the Mississippi State University Alumni Association. Wil is a member of Madison United Methodist Church where he serves as the Chair of the Administrative Council and is a former Finance Committee member. He currently serves on the board of directors for Habitat for Humanity Mississippi Capital Area.

Wil resides in Madison with his wife Melanie and their two children.



## Hutto Joins GranthamPoole PLLC As Partner

**NATALIE S. HUTTO** has joined GranthamPoole, PLLC as a partner and leader of the estate, gift and trust department. In addition to being a licensed CPA, Natalie is licensed to practice law in Mississippi. During her professional career, she has worked in public accounting and practiced law at a Jackson area firm specializing in tax, business, and estate planning matters.

## TURNER INDUCTED TO HALL OF FAME

The 2021 Patterson School of Accountancy Hall of Fame inductee was **Mr. Jon C. Turner**. Jon is a retired partner from the Jackson office of BKD, where his public accounting experience with several firms spanned over 40 years and multiple industries. He is a member of the Mississippi Society of CPAs and was selected as the winner of the 2013 MSCPA Public Service Award for his community and statewide civic involvement.

Jon is a native of Belzoni, Mississippi, and a 1978 accountancy graduate. He began his career with the international accounting firm of Peat Marwick Mitchell, now KPMG, in Jackson. After three years, he joined a local firm that later became Smith, Turner & Reeves, which grew into one of the three largest CPA firms in Mississippi. After serving over 20 years as the managing partner of that firm, he guided the 2008 merger of his firm and two other Mississippi CPA firms with BKD, garnering him the title "father of BKD Mississippi."

Jon serves as the past chairman of the Board of Trustees of the Community Foundation for Mississippi and serves on the Board of Governors of the Mississippi Economic Council and the Mississippi Public Broadcasting Foundation. He is also involved with various organizations and groups in the Jackson area.

Jon is a past president of the National Ole Miss Alumni Association and currently serves on the Executive Committee of the Ole Miss Alumni Association Board of Directors. He previously served multiple terms on the boards of the University of Mississippi Foundation and the UM Athletics Committee. Jon served as a co-chair of the Ole Miss First Campaign and on the steering committee for the campaign to construct the Inn at Ole Miss. He served three terms as an appointed member of the Inter-Alumni Council for Mississippi Institutions of Higher Learning. He is proud to have donated to Ole Miss Athletics for 44 straight years.

He has served on the PSOA Professional Advisory Council for many years and is currently serving on the steering committee for the campaign to construct the new accountancy building. He and his wife Pam have endowed an Accountancy Leadership Scholarship.



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Jon has been active as an advisor and mentor to Kappa Alpha and was awarded its highest honor, the "Knight Commander's Accolade" by the group's national organization and honored as "Alumnus of the Year" by the active chapter, who later named the award for him. At KA's 150year celebration in 2015, he received the Distinguished Service Award, recognized as being the most impactful alumnus in the history of the Ole Miss chapter.

Jon and his wife, the former Pam Mills, reside in Jackson. They have two daughters, who are also Ole Miss grads, and six grandchildren.

By: Patterson School of Accountancy, The University of Mississippi

## **UPDATE** from State Auditor Shad White

As you probably know, our long-time Deputy State Auditor **Pat Dendy** just retired. It was well-deserved. With 30+ years of service, Pat was a great leader and asset to state government. He will certainly be missed.

This raises the question of how the Office of the State Auditor will operate in a post-Pat world. The answer is that we will go back to a structure that more closely mirrors how state law imagined the office. In the statutes, there are two division leaders that are mentioned specifically: the head of Finance & Compliance and the head of Investigations. Starting this month, the directors of those divisions (**Stephanie Palmertree** and **Larry Ware**) will have the title Deputy State Auditor. For those of you who communicated with the office, any sort of general questions you may have that you typically took to Pat can be brought to **Charles Woods**, my Chief of Staff. As always, if you have any questions about what spending is or is not allowed with taxpayer funds, you can reach out to **Tom Chain** and the Technical Assistance Division. Stephanie will be your resource for audit findings. Larry's shop will continue to field your tips and whistleblower complaints about potential illegal activity . Our office number for all these individuals is still 1-800-321-1275.

Thank you!



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## PAST CHAIRMEN ATTEND 2022 MSCPA CONVENTION



Sitting from left: Gary Walker (1995-1996), Donna Bruce (2019-2020), Cheryl Sykes (2015-2016), Karen Moody (2014-2015), Jan Lewis (2008-2009), Bob Cunningham (2099-2010) Standing from left: Stacy Thomas (2011-2012), Clyde Herring (2004-2005), John Robinson (1987-1988), Sim Mosby (2010-2011), Ed Jones (1997-1998), Charles Prince (2016-2017), David Miller (2003-2004), Lee Adams (2012-2013)

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# MSCPA Honors HAMP KING AWARD WINNER

**Niland Fortenberry,** of the University of Mississippi, was honored at the Patterson School of Accountancy Spring Awards Banquet for her selection as the Hamp King Award scholarship winner. Fortenberry was presented an additional \$1,000 scholarship and a plaque from the MSCPA Education Foundation. One scholarship winner from among all MSCPA undergraduate scholarship recipients is selected each fall based on outstanding academic and collegiate leadership. The award was named to honor the long-time service of the late Hamp King as Mississippi's State Auditor.

Pictured with Niland Fortenberry are Dr. James Davis, Dean Mark Wilder, and Dr. Dave Nichols.



## Deloitte Gives Contribution to MSCPA for Student Outreach

In continuation of their support of state CPA societies, Deloitte has given another contribution of \$5,000 to the MSCPA. The funds are earmarked for student outreach and will be used to meet the goals of our strategic plans to address the pipeline issues.

Last year, Deloitte contributed \$5,000 toward our Diversity, Equity, and Inclusion (DE&I) initiatives and efforts.

Thank you, Deloitte!

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## **CONTRIBUTE** to the PAC

The MSCPA Political Action Committee (PAC) is people working together to improve our profession. Members' support gives us the ability to better achieve our annual legislative agenda.

The MSCPA PAC is a non-partisan committee comprised of CPAs who uphold the political voice of the CPA profession. By combining financial resources, the PAC is able to leverage its impact for positive results. The MSCPA PAC pools members' contributions and contributes funds to friendly state legislators and candidates who support CPA and business interests and encourages and supports our own CPAs as political candidates. The MSCPA's Legislation Committee closely monitors legislation and state agency proposals to determine their impact upon the profession.

Members can contribute to the PAC when paying annual dues, or members can contribute anytime by visiting www.ms-cpa. org/advocacy.

Contributions or gifts to the MSCPA are not deductible as charitable contributions for federal income tax purposes. Dues payments are deductible by members as an ordinary and necessary business expense. However, MSCPA has determined that 5% of your dues are attributable to lobbying activities and are non-deductible.

## **CHAPTER DUES**

MSCPA chapter members are now able to pay for 2022-2023 dues by downloading the dues notice linked on each of our nine chapter webpages.

### **RENEWAL PERIOD:** JULY 1, 2022 - JUNE 30, 2023

Chapter officers are meeting and planning CPE Lunch and Learns and other chapter events. Be on the lookout for upcoming event information. For chapter information including leadership, event details and photos, check out our chapter webpages at www.mscpa.org/membership/chapters.

## MAULDIN WINS FREE SANDESTN GETAWAY



All members who booked their room directly with Sandestin using our group code by May 1st were entered into a drawing to win a free two-night stay in Luau at Sandestin. A name was drawn during our Saturday dinner at Convention on June 25th. MSCPA announced Shawn Mauldin of Adkerson School of Accountancy at Mississippi State University as our winner! Thank you for joining us at Convention and booking your room in our room block. EXPERIENCE & KNOWLEDGE Expert Witness Qualified



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# 2022 MSCPA CONVENTION

Members traveled to Sandestin Golf and Beach Resort in Destin, Florida June 22-26 for the 2022 Annual Convention and Business Meeting. This year's convention welcomed members, including first-time attendees, spouses, children and guests, plus event sponsors and exhibitors. The convention returns to Sandestin next year June 21-25, 2023. Additional convention photos have been posted to GooglePhotos and the link can be found on the Annual Convention page of the Society's website (https:// www.ms-cpa.org/education/annual-convention).











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Mississippi Society of Certified Public Accountants











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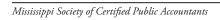


















































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## Young CPA President Passes the Gavel

Phillip Chu, outgoing YCPA President, passed the gavel to Ashley Sullivan Saturday, June 25th at the MSCPA Annual Business Meeting. This meeting was held during our Annual Convention in Sandestin, Florida. We would like to formally congratulate Ashley on being the new YCPA President and look forward to the upcoming year under her leadership. Ashley is a Senior Tax Manager at Haddox Reid Eubank Betts, PLLC.



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Mississippi Society of Certified Public Accountants

# CPA Evolution Transition **POLICY ANNOUNCED**

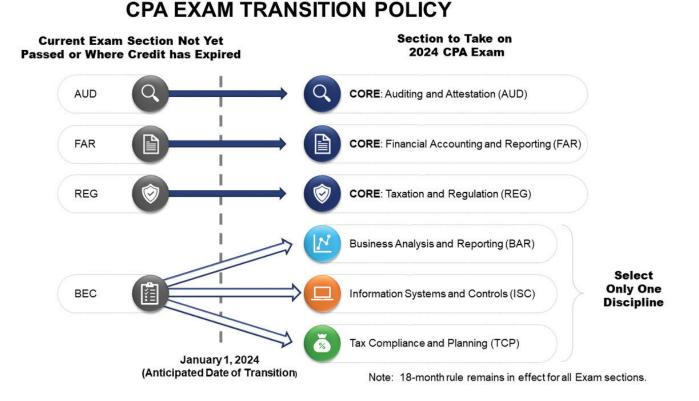
The Uniform CPA Examination is changing significantly in January 2024. It is important to understand this initiative and the upcoming changes to the CPA Exam to fully understand how it might impact the journey to CPA licensure. If a candidate passes and retains credit for all four CPA Exam sections by December 31, 2023, the changes to the CPA Exam will NOT impact the journey. If the candidate is still working through the CPA Exam in January 2024 and beyond, then the information about the CPA Exam) and transition policy are most important to understand.

The transition policy is quite simple. Candidates who have credit for AUD, FAR or REG on the current CPA Exam will not need to take the corresponding new core section of AUD, FAR or REG on the 2024 CPA Exam. Candidates who have credit for BEC on the current CPA Exam will not need to take any of the three discipline sections.

If, however, a candidate loses credit for AUD, FAR or REG after December

31, 2023, they then must take the corresponding new Core section of AUD, FAR or REG. A candidate who loses credit for BEC after December 31, 2023, must select one of the three Discipline sections to be tested. It is important to note that none of the sections of the current CPA Exam will be available for testing after December 31, 2023. There is a hard cutover from the current CPA Exam sections to the 2024 CPA Exam sections on the January 2024 launch.

### The following chart lays out the transition policy for each Exam section.





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msfcu.us



## **CONFERENCES**

### MSCPA 38TH ANNUAL AUGUST **GOVERNMENTAL ACCOUNTING** 18-19, 2022 Approved for **& AUDITING CONF** 16 CPE Credits

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

### FEATURED SPEAKERS



Stephanie Palmertree Deputy State Auditor and Director

## AGENDA

### THURSDAY, AUGUST 18, 2022

Opening Remarks
Its Finally Here: GASB Statement No. 87, Leases Lauren Berry, FORVIS Senior Manager
AICPA Update Bill Felder, Harper, Rains, Knight & Co.
Break
2022 Compliance Supplement and Single Audit Update Lauren Berry, FORVIS Senior Manager
Changes to the Audit Opinion Leigh Taylor, Mississippi Office of the State Auditor
Lunch
<b>2022 Office of the State Auditor Update</b> Office of the State Auditor Panel ( Stephanie Palmertree, Leigh Taylor, and Tom Chain)
Break
Single Audit Findings : A Closer Look OSA ( Stephanie Palmertree & Other)
<b>ARPA in Mississippi</b> OSA ( Stephanie Palmertree & Other)

Professor of Accountancy at Mississippi College



### WHO SHOULD ATTEND

- CPAs working in federal, state or local government
- Public practitioners with governmental clients
- Auditors and accounting to be aware of emerging

### FRIDAY, AUGUST 19, 2022

8:25 AM - 8:30 AM	Welcome and Announcements
8:30 AM - 10:10 AM	2022 <b>GASB Update</b> Lisa Parker, Senior Project Manager with Governmental Accounting Standards Board (GASB)
10:10 AM - 10:20 AM	Break
10:20 AM - 11:10 AM	The Evolution and Future of Accounting Billy Morehead, Professor of Accountancy at Mississippi College
11:10 AM - 12:25 AM	Emerging Issues in Governmental Accounting Moderated by Lydia Windham
12:25 PM - 1:15 PM	Lunch
1:15 PM - 2:05 PM	Peer Review: An Indepth Look Chuck Jordan
2:05 PM - 2:55 PM	<b>2022 Mississippi Economic Update</b> Corey Miller, State Economist at Mississippi Institutions of Higher Learning
2:55 PM - 3:05 PM	Break
3:05 PM - 4:20 PM	In the Trenches with Data Analytics Billy Morehead, Professor of Accountancy at Mississippi College
	Door Prize & Adjourn

Register online at www.ms-cpa.org

# **MSCPA Banking and Finance Conference**

## TUESDAY, AUGUST 23, 2022 Livestream and In Person at the MSCPA Training Center in Ridgeland

Don't miss the opportunity to receive key updates from top regulators, engage in discussions with bank leaders and firm partners and prepare for the year ahead.

### Who should attend?

Public practitioners with banks & savings institution clients, preparers and/or auditors of financial statements, financial executives working in both large and small institutions, as well as regulators controllers and CFOs.

### Credits: 8

Cost: Member \$200 Non-Member \$275

## **Featured Topics**

- Fireside Chat on Current Regulatory Challenges Gordon Fellows, MS Bankers
   Association with Rhoshunda Kelly, MDBCF Commissioner
- Economic Update Dudley Carter, Stifel
- Corporate Finance Update Mike Morgan, University of Southern Mississippi
- Tax and Accounting Update Lance Davis, CPA, BKD and Bradley Floore, Horne LLP
- Mergers and Acquisitions Hot Topics for Community Banks Christopher Olsen, Olsen Palmer LLC



## **AGRICULTURAL AND FARM ACTIVITIES** CONFERENCE

## THURSDAY, AUGUST 25, 2022

Livestream and In Person at the MSCPA Training Center in Ridgeland

This conference covers special tax rules and tax accounting methods pertaining to agricultural and farming activities and recent tax law changes that affect farmers and more.

## **CREDITS: 8**

### Featured Topics:

- Agriculture Tax Update Michael Frost, CPA
- Agriculture and Timber Tax Update - Michael Frost, CPA
- Economic Update -MS Commissioner of Agriculture & Commerce
- Farm Financial Trends & Outlook Kevin Kim, Mississippi State, Professor, Department of Agricultural Economics
- Farm Management Issues and Price Outlook - Brian Mills, Mississippi State, Professor, Department of Agricultural Economics
- Medical Marijuana Issues and Update

## **COST: \$215**

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# ANNUAL HEALTH CARE SERVICES CONFERENCE

## THURSDAY, SEPT. 22, 2022

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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

### **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 TBD

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

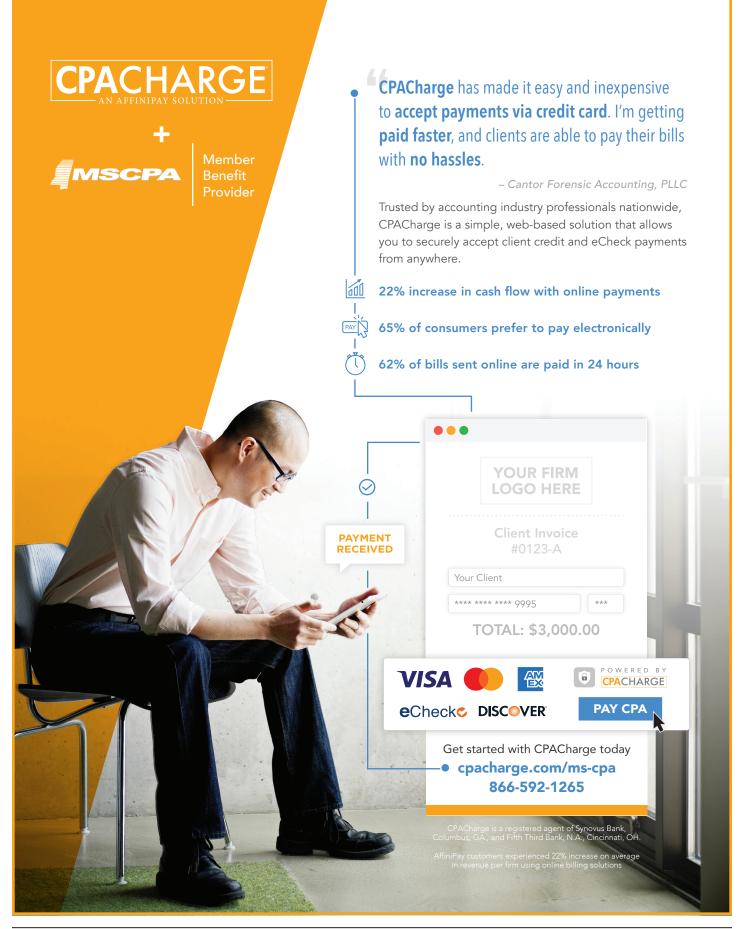
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ANNUAL DUES

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## **2022-2023 DUES NOTICE**

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### **Firm Admins**

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

MEMBER LEVEL	DESCRIPTION	DUES	BILLED
Certified 3 Years or More	<b>3 Years or More</b> A CPA earning any fee from public practice in Mississippi and holding original CPA certificate 3 years or more.		
Certified Less than 3 Years	A CPA earning any fee from public practice in Mississippi and holding original CPA certificate less than 3 years.	\$170	
Not in Public Practice	Any CPA employed in Mississippi who is not engaged in any public practice.	\$175	
Non-Resident	Non-resident CPA who resides and works outside of Mississippi.	\$120	
Associate	Non-CPA or inactive CPA who is not employed full-time.	\$105	
Retired	CPA earning no fee and has reached full retirement age.	\$50	
Life Member	MSCPA member for 40+ consecutive years who has reached full retirement age and is retired, earning no fee, and has notified the MSCPA.	\$0	

Contributions or gifts to the MSCPA are not deductible as charitable contributions for federal income tax purposes. Dues payments are deductible by members as an ordinary and necessary business expense. However, MSCPA has determined that 5% of your dues are attributable to lobbying activities and are non-deductible.

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YOUR CONTRIBUTION □ \$100 □ OTHER \$ □\$75 □ \$25 □\$50 IMPORTANT NOTICE ABOUT THE VOLUNTARY PAC CONTRIBUTION: The MSCPA's Political Action Committee is a separate division of the Mississippi Society of Certified Public Accountants with its own Board of Directors. The PAC receives contributions from MSCPA members to be used to support candidates who favor a positive business climate in the State. Contributions are voluntary and PAC membership is not a requirement of membership in the MSCPA.

## EDUCATION FOUNDATION CONTRIBU

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- Risk assessment development

Certified Internal Audit designation or previous experience in internal audit/financial statement audit/accounting/finance is preferred but not required. Exposure to control frameworks

such as COSO and/or ISACA are also a plus. Please submit your resume in confidence to khutson@hrkcpa.com. ٠

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- Southwest TN / Northwest MS tax & accounting practice grossing \$160K \* New \*
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For more info on any of these listings or to sell your practice, contact Lori Newcomer, CPA and Tim Price, CPA at (888) 553-1040 or PNgroup@APS.net, or visit www.APS.net.

TAX MANAGER: Locally owned CPA firm in Corinth, MS, is looking for a Tax Manager. Our clients are our passion, and the relationships that we develop with them are as important as the expertise that we provide. The firm is well positioned for growth and this role will play a key part in that undertaking. Competitive compensation based on candidate's experience. A CPA is preferred but not required. We understand the value that experience provides in this field. Send your resume to sdobbins@dmpacpa.com.

CPA/CPA CANDIDATES: Silas Simmons, LLP, a large, locallyowned CPA firm, with offices in Natchez, MS and Monroe, LA, is looking for CPA/CPA Candidates. Openings in both tax and auditing. Excellent opportunity for professional growth and advancement. Competitive compensation and benefit package. Opportunity to be part of a growing and well-established CPA firm. Send your resume to arobinette@silassimmons.com.

CPA/CPA CANDIDATES: Barlow and Company, PLLC, located in Brandon, Mississippi, is expanding! We are seeking an experienced accountant for both our tax and audit departments. CPA or CPA eligible with 3-5 years comprehensive public accounting experience required. No overnight travel! Flexible, remote and part time opportunities available for the right candidate. Excellent work/life balance, and generous salary and benefits package. Contact Greg Vaughn at 601-825-1310.

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AUDIT MANAGER AND STAFF AUDITOR: Holt & Associates, PLLC is a locally-owned and growing CPA firm with offices in Hattiesburg and Laurel. We are looking for an audit manager and staff auditor. Competitive salary package and flexible work hours including some remote working. Email resume to julie@ holtaccounting.com

### • **PROFESSIONAL OFFICE SPACE AVAILABLE TO SHARE:**

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Biloxi/D'Iberville MS area. Perfect for a professional wanting to establish their own office or a firm with minimal office requirements. We have an office with 3 private offices, a large reception area with 2 modular work areas, kitchenette, storage areas and 2 bathrooms. Up to one half of this is available to share. Future potential for transfer small client base of tax and write-up. Close to Interstate. Reasonable Cost, depending on space selected. Contact tclcpa@gmail.com.