



NEW CPAS HONORED by STATE BOARD at May 6 Ceremony



The Mississippi State Board of Public Accountancy recognized new CPAs during their Spring Ceremony Saturday, May 6, at the Capitol in Jackson. MSCPA CEO Karen Moody introduced the new CPAs to the Society and Ashley Sullivan, President of the MSCPA Young CPA Network, provided an overview of the Network and invited the new CPAs to become active. This year's keynote speaker was Billy Morehead. Charles Prince, Chairman of the State Board, administered the Oath of Title.

New CPAs recognized were:

Christopher Ryan Adcock, Anasa Maria Bailey, Destiny Rae Chafin, Nicholas Bernard Conley, Latonya Yvette Gandy, Lori L. Garrett, Daniel Owen Gilbert, Marlo Levett Hardiman, Kelcie Messer Hayes, Charles Gibson Horne, Holly Caroline Ladner, Marie Elaine Laptas, Kayla Jo Martin, Bailey Nicole Matthews, Seth Anthony Matthews, Madeline Elizabeth Thames, Jessie Marie Wright and Samuel E. Yeager.

Continued on pages 14-15



Goodrum Wins **FREE** Convention Registration

All members who registered for Convention by May 1 were entered into a drawing to win free registration. A name was drawn during our Leadership Luncheon on May 11, and the MSCPA has announced Anita Goodrum of Watkins, Ward and Stafford as our winner. Congrats, Anita! We look forward to seeing you in Destin soon.

IN MEMORIAM

T. MILLER DICKSON, JR.
Jackson, MS
Died March 4, 2023

ALBERT DRIBBEN
Clarksdale, MS
Died April 20, 2023

MEMORIAL GIFT

To the
EDUCATION FOUNDATION

In memory of
BRYAN H. APPLEWHITE
Madison, MS

By
HUGH J. PARKER
Madison, MS

In memory of
PETER A. KOURY
Canton, MS

By
WYNN ALEXANDER
Wiggins, MS

Absentee Ballots Available for Officer Election

The Nominations Committee submits candidates for election to fill each office and for the at-large Board of Directors position for 2023-2024. See pages 8-9 for photos and profiles on the candidates. Each member of the Society can vote at the Annual Meeting in person or by mail ballot prior to the Annual Meeting. The Annual Meeting will be held Saturday, June 24, 2023, during the MSCPA Annual Convention at Sandestin Golf and Beach Resort in Destin, Florida. Members not attending the Annual Meeting may request an absentee ballot by mail (MSCPA, 306 Southampton Row, Ridgeland, MS 39157) or email (ngillis@ms-cpa.org). **Absentee ballots must be received by the Society office no later than June 19** (five days prior to the Annual Meeting on June 24).



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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

Miya Bates

Matthews, Cutrer &
Lindsay, P.A.
Ridgeland

Michael Leo

Blue Cross and Blue Shield
Jackson

Walter R. Thompson IV

FORVIS
Jackson

Destiny R. Chafin

TMH
Hattiesburg

Nate Phillips

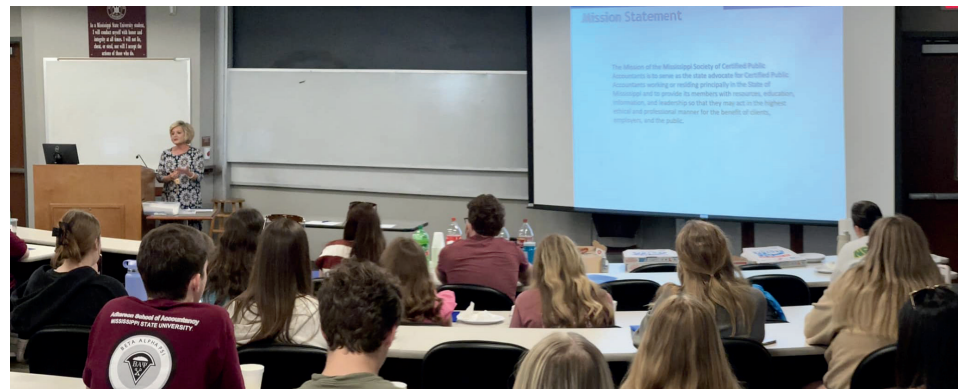
Haddox Reid Eubank Betts
Ridgeland

Samuel Yeager

South Central Regional
Medical Center
Laurel

MSCPA Speaks to MSU Beta Alpha Psi

MSCPA CEO Karen Moody joined Beta Alpha Psi at Mississippi State University to speak on behalf of the Society and hosted a pizza party for the students on Tuesday, April 11.



Mississippi Society of Certified Public Accountants

INCORPORATED UNDER THE LAWS OF THE STATE OF MISSISSIPPI

NOTICE OF ANNUAL MEETING

Under the provisions of Section 4 of the Mississippi Society of CPAs' Bylaws, notice is hereby given of the annual business meeting. It will be held at the Annual Convention at Sandestin Golf and Beach Resort in Destin, Florida on June 24, 2023, at nine o'clock. The election of officers, reports from officers, and other business will be conducted at this time.

Member News

Biglane Family Wins Family Feud



While the show was taped several months ago, on Thursday, April 20, the Biglane family made their debut on Family Feud to then advance and continue to compete on Friday, April 21, and Monday, April 24. Host Steve Harvey suggested during the show that the prize was all but theirs and that the biggest party in Natchez was not far away.

The evening's celebration was, as Harvey predicted, the biggest watch party in Natchez Thursday night. The Biglane family advanced to be the overall winner of \$20,000. Competing on the show were MSCPA members **Lauren Biglane Middleton**, Rebecca Biglane Black, Presley Taylor Jennings, Joanna Biglane McNeel and Melinda Jet Biglane.

Board Nominates Wilder for Trustee

In accordance with the Trust Agreement of the MSCPA Education Foundation, the Trustees of the Foundation of which there are three, shall be appointed by vote of the Society and shall serve for a three-year term beginning July 1. The terms of the Trustees shall be staggered so that one new Trustee shall be appointed each year. For compliance with the Trust Agreement, the Board of Governors of the MSCPA has reappointed Mark Wilder of Oxford. Other Trustees of the Foundation are Josh Norris of Jackson and Stacy Thomas of Jackson.



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Postlethwaite & Netterville Combines with EisnerAmper

Global business advisory firm EisnerAmper announced that the directors and colleagues of Louisiana-based accounting, assurance, tax, consulting and technology firm Postlethwaite & Netterville (“P&N”) will be joining EisnerAmper in a transaction anticipated to close by the summer of 2023.

Founded in 1949, P&N has more than 575 team members across the U.S. and nine offices in Louisiana, Texas and Mississippi. The pairing of these Top 100 accounting firms will bring together two well-established organizations that are fully aligned in their core values, quality client service and integrity.

This combination will have positive impacts for both firms by expanding EisnerAmper’s reach into the Gulf Coast region and providing a platform for P&N’s continued growth on a larger geographic scale. P&N clients will benefit from new and innovative services and the support of a global business advisory firm.

“We’re extremely proud to be joining EisnerAmper and to build upon the existing success of both firms. This is an

unprecedented opportunity to provide our clients with even more innovative and competitive services and for P&N team members to benefit from additional resources and new opportunities for professional growth,” said Dan Gardiner, P&N’s Managing Director and CEO. “By joining with EisnerAmper, P&N will continue to serve our clients across the Gulf South and U.S. with the added support, resources and partnership of a Top 20 firm with a global presence.”

“P&N’s long-standing reputation for excellence in the Gulf Coast and beyond precedes itself. With this one strategic move, we’re adding more than 575 top-talent professionals and further extending deep industry experience in all aspects of our assurance, tax, advisory and outsourcing practice areas—no small accomplishment,” said Christopher Loiacono, EisnerAmper’s Vice Chair of Services. “We greatly look forward to our historic combination with P&N and the vast opportunities it will afford our clients and staff for years to come.”

HORNE Named in Top 25 Accounting Firms



HORNE has been named one of the top 25 accounting firms in the U.S. by industry publication Accounting Today. The magazine recently released a report ranking the top 100 accounting firms, and HORNE was number 24 on the list.

“Over the last 60 years, HORNE has grown from an accounting firm to a dynamic professional services company dedicated to helping clients of every size solve their biggest challenges.” Managing Partner Neil Forbes said, “From data

analytics, strategy and people solutions, to accounting and consulting, we go beyond traditional services to help our clients succeed wherever they are.”

HORNE has 2,000+ team members and more than 30 office and project locations across the country. Specialty areas include Construction, Healthcare, Financial Institutions, Franchise, Government Services and Publicly Traded and Privately Held Companies.

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.

Deloitte contributed \$5,000 toward student outreach in 2022 and \$5,000 toward our Diversity, Equity, and Inclusion (DE&I) initiatives and efforts in 2021.

Thank you, Deloitte for your continuous contributions!



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MSCPA Recognizes OUTSTANDING SENIOR ACCOUNTING MAJORS

In the spring of each year, the MSCPA recognizes outstanding seniors majoring in accounting from colleges and universities all across the state of Mississippi. MSCPA awarded each recipient a plaque and a name plate to be displayed at their college or university. The 2023 recipients are:

ALCORN UNIVERSITY

Akilia Mull

BELHAVEN UNIVERSITY

Herbert Le Roux

DELTA STATE UNIVERSITY

Melissa Lynn Gregg

JACKSON STATE UNIVERSITY

Andrew Evans-Onwujurum

MILLSAPS COLLEGE

Camille Fremaux

MISSISSIPPI COLLEGE

Avery Hederman

MISSISSIPPI STATE UNIVERSITY

Alisha Worthy

MISSISSIPPI UNIVERSITY FOR WOMEN

Kennedy Pugh

MISSISSIPPI VALLEY STATE
UNIVERSITY

Amarachi Nwokpo

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Haley Milstead
Outstanding Senior Accounting Major

CHAPTER INFORMATION REQUESTED

As we approach our new year beginning July 1, we are asking all chapters to report their new officers for the upcoming year, as well as, their newly elected Board of Governors representatives to replace those whose terms expire June 30. We will update the chapter pages on our website in July. Please send the information to Noma Gillis at ngillis@ms-cpa.org.

2023-2024 MEET THE CANDIDATES

The election is scheduled for Saturday, June 24, 2023, during the Annual Business Meeting at Sandestin Golf and Beach Resort in Destin, Florida. Absentee ballots for members who will be unable to attend the Business Meeting are available upon request.

Members of the Nominations Committee included: Ricky Bullock– Chairman, Tupelo; Lee Adams, Flowood; Wil Crawford, Jackson; Penny Godwin, Flowood; Mary Larosa, Gulfport; Katherine Little, Starkville; and Cheryl Sykes, Clinton.

CHAIRMAN



Jerry Goolsby, Jackson

JERRY GOOLSBY, prior to his retirement at the end of May, was an assurance partner with FORVIS in Jackson where he led FORVIS' Mississippi commercial services practice. Jerry began his public accounting career in 1991 with Smith, Turner & Reeves, which merged with BKD (now FORVIS) in 2008. Prior to joining Smith, Turner & Reeves, Jerry served in the accounting department of BancorpSouth in Tupelo. He has served a wide spectrum of industries, including manufacturing, distribution, construction, and telecommunications. Jerry is a native of Falkner, Mississippi and a 1987 graduate of Mississippi State University where he is a member of the Advisory Council for the School of Accountancy and previously served as chair. Jerry is a long-time active member of the MSCPA having served as Treasurer and on the Board of Governors and Executive Committee, as well as President and Vice-President of Programs for the Central Chapter. He currently serves on the Legislative Committee and the Long-Range Planning Committee which he previously chaired. In the community he has served as Chairman of the Metropolitan Jackson YMCA and Treasurer of Friends of Children's Hospital at the University of Mississippi Medical Center and is a graduate of both Leadership Rankin and Mississippi Economic Council's Leadership Mississippi. Jerry is a member of Colonial Heights Baptist Church in Ridgeland where he has served as Chairman of the Elders and Finance Committee and currently teaches a young couples class. Jerry and his wife Vicky have two grown sons and currently live in Canton.

VICE-CHAIRMAN/CHAIRMAN-ELECT



Tom Walker, Jackson

TOM WALKER is a partner in the Corporate Practice Group of Jones Walker, LLP, in Jackson. Tom focuses his practice on commercial and regulatory matters in the financial services industry, with a depth of experience representing financial institutions. Tom received his Bachelor of Accountancy and Masters in Professional Accountancy from Mississippi State University, and he received his J.D. from the University of Mississippi. Tom has been an active Certified Public Accountant in Mississippi since 2001, and currently serves the Society as Chairman of the Banking Committee and as a member of the Long Range Planning Committee. Tom previously served on the Board of Governors for the Society as Secretary as well as the Central Chapter representative. He has also served as a member of the Society's Health Care Services and Legislation Committees, as well as the first Millennial Chair of the Long Range Planning Committee and a member of the initial board of directors of the Young CPA Network. In addition to his service to the MSCPA, Tom has previously served as Chairman of the Attorneys Committee of the Mississippi Bankers Association during the 2017-2018 fiscal year, and currently serves as a member of that committee as well. He has also served as Treasurer and member of the Executive Council of the Mississippi Young Bankers, and has been named in Best Lawyers in America in the areas of Administrative/Regulatory Law, Banking and Finance Law, Business Organizations (including LLCs and Partnerships), Corporate Law, Financial Services Regulation Law and Mergers and Acquisitions Law, and Securities / Capital Markets Law. Tom was also recognized in 2020 and 2023 by Best Lawyers in America as Lawyer of the Year in Financial Services Regulation Law for Jackson, Mississippi.

TREASURER



Chase Farmer, Tupelo

Charles F. "Chase" Farmer, IV is a manager at Nail McKinney Professional Association in Tupelo. He has over 15 years of public accounting experience, focusing on small business accounting, government and non-profit auditing, and tax services for individuals and businesses. Chase holds degrees from both The University of Mississippi and Mississippi University for Women.

Chase has served as Treasurer/Secretary, Vice-President, and President of the Northeast Chapter and two terms on the Board of Governors. He continues to help coordinate CPE and meetings for the Northeast Chapter.

MEET THE CANDIDATES CONT'D

SECRETARY

Julia Jesuit, Ridgeland



JULIA JESUIT is a partner with Carr, Riggs & Ingram, LLC in Ridgeland. She has over 13 years of experience in providing reimbursement services to hospitals, rural health clinics, home health agencies, hospices, and skilled nursing facilities. She specializes in cost reporting services, Medicaid eligibility studies for Medicare DSH/LIP purposes, Medicare bad debt review and analysis services, and assistance with Medicare worksheet S-10 analysis and auditor reviews. Julia is a graduate of Millsaps College, in 2010 with her BBA in Accounting and then in 2011 with her Masters of Accountancy. Julia has served as Treasurer, VP of Membership, VP of Programs, and President for the Central Chapter during the years of 2014 – 2018. She also has previously served two terms on the MSCPA Board of Governors. She currently serves as the Chairman for the MSCPA Healthcare Services Committee. Julia is a past recipient of the Hamp King Award in 2009 and then the Rising Star Award in 2019. She also is a Fellow of the Healthcare Financial Management Association (HFHMA) and currently serves as the Treasurer for the Louisiana Chapter of HFMA. Julia is a current member of the Junior Auxiliary of Madison County where she has previously served as Assistant Treasurer, Treasurer, and most recently Finance Committee Co-Chair. She also is a current member with the Junior League of Jackson.

AT-LARGE BOARD MEMBER

Annette Herrin, Hattiesburg



ANNETTE HERRIN is the CFO for Southern Bone & Joint Specialists, P.A. Prior to her work in the corporate setting, she gained over 25 years of public accounting experience, 20 of which focused in the areas of business valuation and litigation support. Annette is Accredited in Business Valuation (ABV), a Certified Fraud Examiner (CFE), and Certified in Financial Forensics (CFF). She was named one of “Mississippi’s 50 Leading Business Women” in 2001 and “Top 40 Under 40” in 2008 by the Mississippi Business Journal. She is a past Chairman of the MSCPA and also served as Secretary and on the Executive Committee. She served as Chairman of the Business Valuation and Litigation Support Committee of the MSCPA and is a past member of the Certified in Financial Forensics Credential Committee of the AICPA. She has also previously served as member of the Valuation Education and Credentialing Board of the National Association of Certified Valuators and Analysts and past President of its Mississippi chapter. Annette has also served on the University of Southern Mississippi Foundation Estate Planning Council (including member of the Executive Committee), the Finance Committee for the University of Southern Mississippi Alumni Association, and is a past President of the Southeast Chapter of the MSCPA. She is a graduate of the University of Southern Mississippi with a Bachelor of Science in Business Administration and a Master of Business Administration.

EDUCATION FOUNDATION TRUSTEE

Dr. Mark Wilder, Oxford



DR. MARK WILDER is Dean and KPMG Chair of Accountancy in the Patterson School of Accountancy at The University of Mississippi. His educational background includes an associates degree from Tyler (TX) Junior College, a bachelors degree from The University of Alabama, an MBA from the University of South Alabama, and a PhD in Accounting from Florida State University. Dr. Wilder is a CPA and has been on the faculty at Ole Miss since 1993, serving as dean since 2006. His expertise is in financial accounting and he continues to teach the two intermediate courses as well as a doctoral seminar in financial accounting. He has also been published in a variety of journals. Dr. Wilder has been instrumental in the development of the School of Accountancy’s highly successful internship program. He has previously served as the Society’s president of the Northeast Chapter, as state-wide Treasurer, an appointment on the Board of Governors, Chair of the Awards, Education, and Scholarships Committee, and on the Nominating Committee. He currently serves as a Trustee of the MSCPA Educational Foundation. Dr. Wilder has received the top two campus-wide faculty awards at Ole Miss including the prestigious Elsie M. Hood Outstanding Teacher Award in 2005, and the Faculty Achievement Award in 2004. In 2006, Mark was honored as the Society’s Outstanding Educator and was also the University of Mississippi HEADWAE Faculty Honoree for 2006. He is also a two-time winner of both of the Patterson School’s top faculty awards (the Outstanding Teacher Award and the Outstanding Researcher Award). In 2017, he was honored by the Mississippi Business Journal as one of the state-wide Leaders in Finance.

PREMIER CHECKING

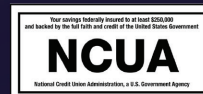
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KEYNOTE & CPE INSTRUCTOR AT THIS YEARS ANNUAL CONVENTION!

The Top 10 Excuses That Keep You From Being Great

1. You don't know how.

One word kicks this excuse in the teeth: "Google."

Information is more accessible now than any time in history, and most of it is free. Find it. Put it to use.

If you Google isn't helpful, find a book at your local library or buy one on Amazon. If that doesn't work, hire a coach, or ask a mentor for help.

Success requires preparation and that requires learning.

2. You don't know the right people.

Information is accessible and so are people that can help you, even if it doesn't seem like it.

Nearly anyone you need to connect can be found on Twitter, Facebook, or LinkedIn. Every person has a telephone number and an email address. Get in the habit of reaching out.

With a little patience and persistence, you can connect with the right people. Some people may play hard to get, but you will connect if you want it bad enough.

Do not waste people's time. Communicate details of a mission they can't resist, and you'll be half-way there.

3. You don't have the money.

Just to be clear, you have some money. Whenever you don't have enough money, there are ways to re-prioritize your spending. Create a strict budget and set aside a portion of your income to achieve your dream.

Past that, there are plenty of ways to increase your income, including freelancing and (gasp!) working a second job. Cash is everywhere, go earn your share.

Change your mind set about money. Consider creative financing through trade and favorable terms.

4. Someone else is already doing it.

The fact that someone beat you to the punch can be good news.

Which came first, Copyblogger or Probblogger? Groupon or Living Social? Dyson or Hoover? Yahoo or Hotmail?

Does it matter? Not really.

5. You'll get to it later.

No, you won't. You never do.

Get to it now, or at least schedule it. Then, follow through. Think of achieving goals like golfing. Just keep getting the ball closer to the hole.

6. You're not ready for that level of success.

This is my personal favorite. It's been my "go to" excuse forever.

If you believe it, it must be true, right?

Let's reframe. Maybe you're not ready for that level of success right now, but you will be soon.

Success is an iterative process. Every step leads to the next step. Every "overnight success" was a long, winding road littered with obstacles. Dealing with those obstacles makes you stronger.

Only one thing is guaranteed: success doesn't actually happen overnight.

7. There are too many obstacles.

Every epic success story involves overcoming challenges.

To save the princess, you must travel through dangerous territory, sail the ocean, answer the riddles of the creepy old man at the bridge, and bring an offering to the king.

And that's the easy part. For only then do you get to slay the dragon.

It's going to be difficult, but trust me, the princess is worth it.

8. You don't have a (good) website.

Lots of profitable businesses with terrible websites.

If your site needs an upgrade, stop procrastinating get it done. If it's a matter of money, see excuse number four above.

If you don't have the resources for a website redux, build attractive, effective landing pages instead.

9. You're too tired.

Put yourself on a schedule, structure your day, and get more rest. If necessary (and possible) take naps so you can remain productive.

If you're chronically tired, improve your diet and make time more exercise. Productivity creates energy.

10. You're not confident enough.

Confidence is a learned behavior.

A long time ago someone told me to repeat to myself "I am The Sh*t" 100 times a day."

Eventually, I started to believe it. Find someone who will tell you, "You're the best" and "You deserve it," even if that person is a stranger on a video or podcast. Confidence comes down to believing in yourself. As a speaking coach, it's interesting how frequently I believe in my clients more than they believe in themselves. You can do anything you set your mind to. I believe in you!

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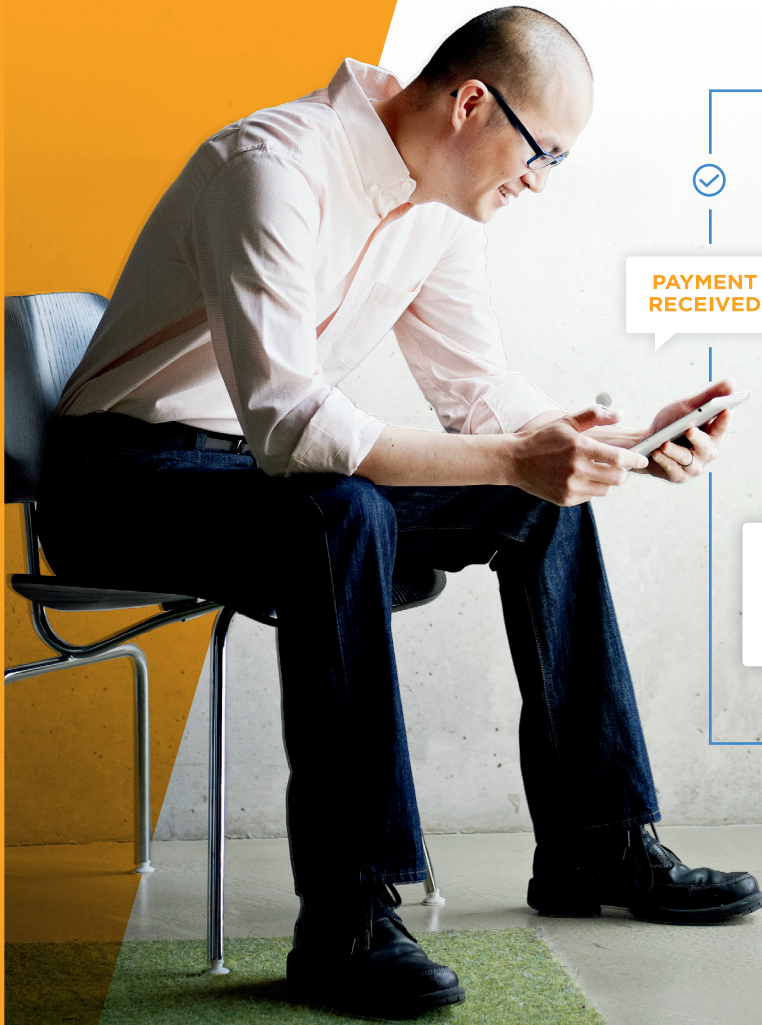
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Register Now for Convention So We Can Complete Planning with Sandestin

Join other MSCPA members in Destin, June 21-25!

MSCPA's Annual Convention is the avenue to promote fellowship among the members. The Officers and Board of Governors welcome members, their families and guest and invite you to enjoy a program planned with entertainment for the whole family. To our new members, we especially invite you to join us and be a part of the convention.

General registration includes:

- Welcome reception with hors d'oeuvres and cocktails
- Friday, Saturday and Sunday breakfast
- Two speaker presentations approved for 2 CPE credits
- Friday box lunch
- Saturday beach party/volleyball tournament
- Saturday reception
- Saturday dinner banquet
- Special entertainment

Following the Friday morning presentations, members may choose to participate in the golf tournament or aboard the Destiny for an afternoon of fishing. We've also added again this year, a free Family Fun Putt-Putt at The Dunes at Beachside Towers on Friday afternoon. Get your activity registrations in! Spouses, guests and children are welcome.

We are also looking for players and teams of six or more people to go head-to-head and claim the Bailey Trophy and title as champions of the 8th annual MSCPA volleyball tournament. The volleyball tournament and beach party is a free activity. Gather up your co-workers, colleagues, family or friends and email kmoody@ms-cpa.org to sign up to play or just let us know you want to play and we will add you to a team.

Visit ms-cpa.org/education/annual-convention to download the brochure for a detailed agenda and for more information about our speakers and special entertainment. You can register online or download a printable registration form to register by fax or mail.

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CPA LICENSE PRESENTATION CEREMONY



MSCPA Members: Christopher Ryan Adcock, Madeline Elizabeth Thames, Anansa Maria Bailey, Karen Moody, Bailey Nicole Matthews, Ashley Sullivan, Holly Caroline Ladner, Samuel E. Yeager and Kayla Jo Martin



Ashley Sullivan, Karen Moody and Chris Adcock



Gary Walker, Charles Prince, Karen Moody, Ashley Sullivan, Billy Morehead, Annette Pridgen and Andy Wright



Kayla Jo Martin and Karen Moody



Charles Prince, Ashley Sullivan, Billy Morehead and Andy Wright



Billy Morehead and Andy Wright



STATE BOARD

Back Row: David Bridgers, Rick Elam, Willie Sims and Gary Walker Front Row: Andy Wright, Bill Kelly, Charles Prince and Annette Pridgen

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- Exempt Organizations



Trip Barnes - J.D., LL.M.




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

Will Janoush - J.D., LL.M.



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YCPA SOCIAL

The MSCPA Young CPA Network hosted a social on April 26 at the Crawdad Hole with over 50 in attendance. Everyone gathered to network and have fun before the YCPA Conference the next day. Crawfish with all the fixings was served while those who chose to participate competed in a cornhole tournament.

Thank you to the Events Chairman Andres Posada, YCPA Board and everyone who attended!



YOUNG CPA CONFERENCE

MSCPA officially kicked off the “CPE season” on April 27 with our Young CPA Conference. There were 32 online and 31 in-person attendees who heard from speakers, Crystal Cooke, Lisa Simpson, Liz Burkhalter, Logan Reeves, Matthew Mclaughlin, and panel: Shannon Adams, Lydia Windham, Noah Davis, Domina Kaler and Kimberly Williams.

During this conference, we also hosted our YCPA Annual Business Meeting voting two new members onto the Board and announced our 2023 Rising Star recipient. Congratulations to Katie Hudson and Lauren Herzog Wray on joining the Board and Lydia Windham on receiving our Rising Star Award!

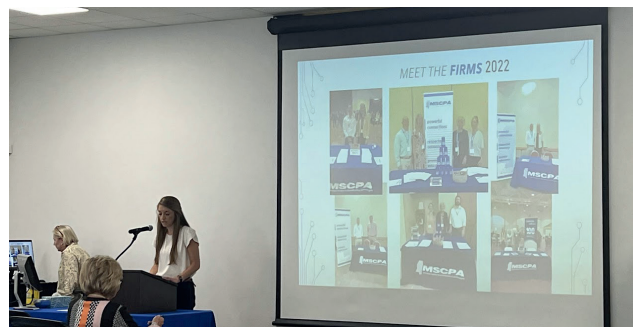
Thank you to the Young CPA Board and Conference Chairman, Noah Davis, for planning such a great event.

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2023 CPE at A Glance

BEGIN	DAY	NEW	COURSE TITLE	LOCATION	LIVESTREAM	AICPA MEM	NON MEM	CPE HRS	RECOM'D CATEGORY	
Jan 23	M	New	Livestream Only: Hot Tax Tips with Art Auerbach	Online		79	119	2	Tax	
Feb 15	W	New	Livestream Only: Hot Tax Tips with Art Auerbach	Online		79	119	2	Tax	
Mar 07	T	New	Livestream Only: What's new in Excel	Online		79	119	2	A&A	
Mar 14	T	New	Livestream Only: Shortcuts that Excel Users Love	Online		79	119	2	A&A	
Mar 21	T	New	Livestream Only: The Needed Focus on Cyber-Security	Online		79	119	2	A&A	
Mar 28	T	New	Livestream Only: Stopping Tech-Fraud Aimed at Individuals	Online		79	119	2	A&A	
Apr 27	Th		Young CPA Conference	MSCPA Center		125	125	8	Gen/PD	
Apr 28	F	New	CFO Series - Planning for the Long Term	MSCPA Center		295	365	8	Gen/A&A	
May 10	W	New	Livestream Only: Hot Tax Tips with Art Auerbach	Online		79	119	2	Tax	
May 11	Th		Committee Day	MSCPA Center						
May 15	M	New	Accounting, Audit, and Attest Update for Practitioners with Small Bus. Clients	MSCPA Center		285	355	8	A&A	
May 16	T		Accounting and Auditing Conference	MSCPA Center		225	300	8	A&A	
May 17	W		MS Sales and Use Tax	MSCPA Center		160	200	4	Tax	
May 17	W		Ethics & Professional Conduct for CPAs	MSCPA Center		160	200	4	Ethics	
May 18-19	Th-F		Business and Industry: Management Development Conference	MSCPA Center		345	465	16	Gen	
May 22-23	M-T		Livestream Only: MS Technology Conference	Online		490	610	16	Gen	
May 24	W	New	Construction Contractors: Critical Accounting, Auditing, and Tax Issues	MSCPA Center		285	355	8	A&A/Tax	
May 25	Th	New	CFO Series - Big Picture Mega-Trends and Risks	MSCPA Center		295	365	8	Gen	
May 26	F	New	CFO Series - Staying Ahead in a Dynamic Economy	MSCPA Center		295	365	8	Gen/A&A	
May 30	T		Individual Income Tax Planning	MSCPA Center		30	285	355	8	Tax
May 31	W		Advanced Taxation of LLCs & Partnerships	MSCPA Center		30	285	355	8	Tax
Jun 01	Th		Real-World Fraud Found in Governments and Not-for-Profits	MSCPA Center		30	285	355	8	A&A/YB
Jun 02	F		2023 Governmental and Not-for-Profit Annual Update	MSCPA Center		30	285	355	8	A&A/YB
Jun 05	M		Select Estate and Life Planning Issues for the Middle-Income Client	MSCPA Center		160	200	4	Tax	
Jun 05	M		Required Minimum Distributions: Compliance and Planning	MSCPA Center		160	200	4	Tax	
Jun 06	T		Maximizing Your Social Security Benefits	MSCPA Center		160	200	4	Tax	
Jun 06	T		Securing a Comfortable Retirement	MSCPA Center		160	200	4	Tax	
Jun 07	W		Surgents Individual Income Tax Update	MSCPA Center		160	200	4	Tax	
Jun 07	W		Surgent's S Corporation, Partnership, and LLC Tax Update	MSCPA Center		160	200	4	Tax	
Jun 08	Th		Annual FASB Update and Review	MSCPA Center		160	200	4	A&A	
Jun 08	Th		Non-GAAP Financial Statement Options: Cash, Modified Cash, and Tax Basis	MSCPA Center		160	200	4	A&A	
Jun 09	F	New	Controller/CFO: Hot Topics Facing Today's Financial Professional	MSCPA Center		160	200	4	Gen	
Jun 09	F	New	Integrated Planning, Forecasting, and Budgeting for Organizational Success	MSCPA Center		160	200	4	Gen	
Jun 12	M		Advanced Audits of 401K Plans: Best Practices and Current Developments	MSCPA Center		285	355	8	A&A	
Jun 13	T	New	CFO Series - Skills for 2023 and Beyond	MSCPA Center		295	365	8	Gen/A&A/PD	
Jun 14	W	New	CFO Series - Today's Staff Retention and Accounting	MSCPA Center		295	365	8	Gen/A&A	
Jun 15	Th		How to Settle a Client's Estate	MSCPA Center		285	355	8	Tax	
Jun 16	F		Accounting and Auditing Update for Small Business	MSCPA Center		30	285	355	8	A&A
Jun 19	M	New	Livestream Only: Advanced Excel Topics for Spreadsheet Power Users	Online		285	355	8	A&A	
Jun 20	T	New	Livestream Only: Internal/External Fraud: Understanding/Working to Control It	Online		285	355	8	A&A	
Jun 21	W	New	Livestream Only: How Fraud Can Affect Smaller Organizations	Online		160	200	4	A&A	
Jun 21	W	New	Livestream Only: Operations Level Internal Control	Online		160	200	4	A&A	

2023 CPE at A Glance *continued*

BEGIN	DAY	NEW	COURSE TITLE	LOCATION	LIVESTREAM	AICPA MEM	NON MEM	CPE HRS	RECOM'D CATEGORY	
Jun 22	Th		Livestream Only: Annual Update/Practice Issues for Prep, Comp & Review	Online		30	285	355	8	A&A
Jun 23	F		Livestream Only: Advanced Controller and CFO Skills	Online		30	285	355	8	A&A
Jun 26	M		Employer's Handbook: Legal, Tax, and Health Care Issues	MSCPA Center			285	355	8	Gen/Tax
Jun 27	T		The Top Five Tax Issues in Dealing with LLCs and Partnerships	MSCPA Center			160	200	4	Tax
Jun 27	T		Succession Planning for the Small Business Owner: Finding the Exit Ramp	MSCPA Center			160	200	4	Tax
Jun 28	W	New	Ethics & Professional Conduct for CPAs	MSCPA Center			160	200	4	Ethics
Jun 28	W		WHAT IN THE WORLD! Current Fraud Cases and Scams	MSCPA Center			160	200	4	A&A
Jun 29	Th		Update on Recent AICPA Standard Setting: Staying Current in a Changing Environ	MSCPA Center			160	200	4	A&A
Jun 29	Th		Technology Trends and Hot Topics Impacting the Accounting Profession	MSCPA Center			160	200	4	A&A
Jun 30	F		Interpreting the New Rev. Recognition Standard: What CPAs Need to Know	MSCPA Center			160	200	4	A&A
Jun 30	F		The Bottom Line on the New Lease Accounting Requirement	MSCPA Center			160	200	4	A&A
Jul 17	M	New	Livestream Only: K2's Next Generation Excel Reporting	Online			285	355	8	A&A
Jul 18	T	New	Livestream Only: K2's Paperless Office	Online			285	355	8	Gen
Jul 26	W	New	Livestream Only: K2's Excel Charting And Visualizations	Online			160	200	4	Gen
Jul 26	W	New	Livestream Only: K2's Hands-On With QuickBooks Online Accountant For Public	Online			160	200	4	Gen
Jul 27	Th	New	Livestream Only: K2's Mastering Advanced Excel Functions	Online			160	200	4	Gen
Jul 27	Th	New	Livestream Only: K2's Improving Productivity With Office 365/Microsoft 365 Cloud	Online			160	200	4	Gen
Jul 28	F	New	Livestream Only: K2's Testing And Auditing Excel Workbooks	Online			160	200	4	Gen
Jul 28	F	New	Livestream Only: K2's Introduction To Excel Macros	Online			160	200	4	Gen
Aug 02	W	New	Livestream Only: Hot Tax Topics with Art Auerbach	Online			79	119	2	Tax
Aug 17-18	Th-F		Governmental Accounting and Auditing Conference	MSCPA Center			295	395	16	A&A/YB
Aug 24	Th		Banking and Finance Conference	MSCPA Center			200	275	8	Gen
Aug 29	T		Agriculture and Farm Activities Conference	MSCPA Center			215	215	8	Gen
Sep 21	Th		Health Care Services Conference	MSCPA Center			215	215	8	Gen
Sep 26	T		Not-for-Profit Conference	MSCPA Center			125	125	8	Gen
Sep 28	Th		Reviewing Individual Tax Returns	MSCPA Center			160	200	4	Tax
Sep 28	Th		Reviewing Partnership Tax Returns	MSCPA Center			160	200	4	Tax
Sep 29	F		Hottest Tax Topics for 2023	MSCPA Center		30	285	355	8	Tax
Oct 20	F		Industry Conference	MSCPA Center			200	275	8	Gen
Oct 23	M		Intermediate Individual Taxation	MSCPA Center		30	285	355	8	Tax
Oct 24	T		S Corporations: Key Issues, Compliance, and Tax Strategies	MSCPA Center		30	285	355	8	Tax
Oct 25	W		Individual Tax Fundamentals	MSCPA Center		30	285	355	8	Tax
Oct 27	F		Accounting Education Conference	MSCPA Center			100	100	8	Gen
Oct 30	M		The Best Federal Tax Update Course by Surgent	MSCPA Center			285	355	8	Tax
Oct 31	T		The Best S Corp, Limited Liability, and Partnership Update Course by Surgent	MSCPA Center			285	355	8	Tax
Nov 15	W	New	Livestream Only: Hot Tax Topics with Art Auerbach	Online			79	119	2	Tax
Nov 16	Th		Business Valuation and Litigation Services Conference	MSCPA Center			200	275	8	Gen
Dec 6-7	W-Th		Mississippi Tax Institute	TBD			400	400	16	Tax
Dec 13	W	New	Livestream Only: Hot Tax Topics with Art Auerbach	Online			79	119	2	Tax
Dec 15	F		AICPA's Federal Tax Update	MSCPA Center		30	285	355	8	Tax
Dec 18	M		Ethics, Rules, and Regulations	MSCPA Center			160	200	4	Ethics
Dec 18	M		Getting Ready for Busy Season: Key Changes Every Tax Practitioner Should Know	MSCPA Center			160	200	4	Tax



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