



# MSCPA

MISSISSIPPI SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS  
VOLUME XLVI  
OCTOBER 2022

## CPA DAY(S) OF SERVICE

November 7, 2022 – November 18, 2022

Unite with CPAs, co-workers and accounting students for the MSCPA's annual CPA Days of Service to make a positive impact in your local community. Like last year, we have expanded our day of giving back to a two-week long event!

You may select your own place where you would like to volunteer for, participate in a food drive or choose one of the options provided for you on our sign-up genius. The link to this sign-up is located on the homepage of our website. Each opportunity is broken up into chapters by location. Participate individually or as a team and pick a date that works best for you. Choosing one of these through our website is vital to the Society to recognize all of your hard work!

### CURRENT VOLUNTEER OPPORTUNITIES BY CHAPTER (MORE TO FOLLOW):

#### Central:

MadCAAP  
We Will Go

#### East Central:

Keep America Beautiful Downtown Clean Up

#### Gulf Coast:

Feed My Sheep

#### North Central:

Salvation Army

#### Northeast:

Salvation Army

#### Southeast:

Edwards Street Fellowship

#### Southwest:

Stewpot Food Drive

## UPCOMING CONFERENCES

Business Valuation  
& Litigation Services Conference  
November 17

Mississippi Tax Institute  
December 7-8

All 2022 conferences are available  
in-person and via livestream.

## CONTEST

Join in on our canned food drive contest  
as a part of our Day(s) of Service!

See how many canned foods you can collect and compete to have the best display! Each group, firm or business will build their best creation with their donations for the opportunity to win. These displays can be themed to your office, a holiday or even a landmark or favorite sports team, etc. Whatever gets your office in the giving spirit! Submit photos of your creation and who you represent to [kstrong@ms-cpa.org](mailto:kstrong@ms-cpa.org) to be in the running. Good luck to all teams and we can't wait to see what you create!

### Registration now open

Register as an individual or team anytime between now and Nov. 18. The registration link can be found on the MSCPA homepage ([www.ms-cpa.org](http://www.ms-cpa.org)). Registration is crucial to tracking data for the event impact report, volunteer participant names and employers and the individual and team who will be recognized.

### How you can get involved

Anything that benefits your community counts. You can sign up to donate to a charity drive or for charity service in your chapter area or plan an activity of your own. Visit our sign-up link at [www.ms-cpa.org](http://www.ms-cpa.org) to find something in your part of the state.

### Who can participate

MSCPA members, co-workers and accounting students. (Non-members may participate on a team with an MSCPA member.) It's all for a good cause.

### Share on social media

#### #MSCPAserve2022

Take pictures and videos of volunteer activities in your t-shirts and tag @MSSocietyofCPAs on Facebook, Instagram and Twitter. Use the CPA Days of Service hashtag on social media, #MSCPAserve2022.

### Send us your pics

Email your photos and videos to [kstrong@ms-cpa.org](mailto:kstrong@ms-cpa.org) so we can share the great things you are doing to serve your communities.



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Certified Public Accountants*

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## OFFICERS

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### *Vice Chairman/Chairman-Elect*

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**President/CEO**  
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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

## MATTHEW BOWEN

Edward Jones  
Starkville

## MELISSA COLEMAN

Carr Riggs & Ingram LLC  
Laurel

## HARUNA CRAIG

Piltz, Williams, LaRosa  
& Company  
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## TRICIA HARMOUNT

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College  
Raymond

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Stafford, PLLC  
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## MARGARET LAUDERDALE

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## STEPHEN MASSEY

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Ridgeland

## SETH MATTHEWS

HORNE  
Ridgeland

## JOSEPH RAY

HORNE  
Ridgeland

## ELISSA ROYBAL

HORNE  
Gulfport

## KELLY SMITH

Barlow & Company  
PLLC  
Brandon

## MATTHEW WALDRUP

Carr Riggs & Ingram LLC  
Laurel

## Nominate a Member for MSCPA Officer

The MSCPA Nominations Committee is seeking nominations from the membership for the 2023-2024 candidate slate. Members will elect a Vice-Chairman/Chair-Elect, Treasurer, Secretary and an At-Large Member to the Board of Governors at the 2023 MSCPA Annual Meeting.

### Nominations should be submitted by December 1.

You are invited to send names of suggested candidates to Ricky Bullock, Nominations Committee Chairman, at [rbullock@nmcpc.com](mailto:rbullock@nmcpc.com) by December 1.

### Qualifications for Candidacy

The Nominating Committee will provide an increased level of consideration to those candidates with the following history of Society involvement:

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

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

## 2023 MSCPA Annual Convention Booking Information Released

June 21-25, 2023

**Sandestin Golf and Beach Resort • Destin, Florida**

Group Code: 24Q6Z3

Book Online: [www.sandestin.com/24Q6Z3](http://www.sandestin.com/24Q6Z3)

Sandestin Group Reservations: 1-800-320-8115

This year will mark the 37th year for the Annual Convention and Business Meeting to be held at Sandestin Golf and Beach Resort in Destin, Florida. Sandestin's Baytowne Conference Center will be the meeting venue for the convention, located just steps from the activities and attractions of the Village of Baytowne Wharf. Your cut-off date for reservations is May 21, after which rooms will be sold on a space available basis.

MSCPA wants to promote the important achievements of our members in the Members News section of our Newsletter. If you would like to share news about a colleague or yourself with the MSCPA community, please email [kstrong@ms-cpa.org](mailto:kstrong@ms-cpa.org).

### Appropriate topics include:

- Significant achievements, professional accolades, awards or recognitions, and partner promotions.
- A link to a press release or website with the announcement is preferred.
- If no link is available, please provide a 50 – 200 word summary of the news.

Your submission will be reviewed for posting. Accepted submissions may be edited and/or formatted by MSCPA.

To submit an announcement for potential inclusion in the MSCPA Newsletter, please send email [kstrong@ms-cpa.org](mailto:kstrong@ms-cpa.org).

**BOARD OF GOVERNORS MEETING • FRIDAY, DECEMBER 16**

2:30 pm • MSCPA Training Center - Ridgeland

**BOARD OF GOVERNORS & PAST CHAIRMEN CHRISTMAS GALA  
FRIDAY, DECEMBER 16 • 6:00 pm • Sheraton The Refuge - Flowood**

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# Member News

## MSCPA Members Appointed to AICPA Committies for 2022-2023

The following MSCPA members have been appointed to an AICPA volunteer group for the committee year that began in May 2022 and will end in May 2023. This includes appointments to boards, committees, and task forces including the AICPA Peer Review Board and the Joint Trial Board.



**Raleigh Cutrer**  
Tax Practice  
Management Committee



**Scott Christian**  
Designated Council  
Representative



**Angela Pannell**  
State Board Committee



**Jan Lewis**  
Tax Executive Committee,  
Chairman



**Charlie Prince**  
Peer Review Board  
& Planning Task Force



**Cheryl Sykes**  
Elected Council  
Representative

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Missy Roberts, CPA  
Dianne Singley, CPA

Samantha Thames, CPA  
Mary Williams, CPA  
Angel Bradley  
Mackenzie Bohl  
Rebecca Coffman  
Rita Dearman  
Adella Gilbert

Mary Grace  
Michael Harrison  
Alana Lewis  
Gina May  
Tena Satcher  
Jessica Young

#### Our Existing Location

900B Hwy 19 South – P.O. Box 271  
Meridian, MS 39301  
Telephone: 601-693-6105

[www.kwsbcpa.com](http://www.kwsbcpa.com)

[www.wws.cpa](http://www.wws.cpa)

#### Our Other Office Locations

Amory · Calhoun City · Columbus · Eupora · Houston  
Kosciusko · Louisville · Macon · Okolona · Oxford  
Philadelphia · Pontotoc · Ridgeland · Starkville · Tupelo · West Point

# Get A Jump Start On Reducing Your 2022 State Tax Liability

## CHILDREN'S PROMISE ACT CREDIT

The Children's Promise Act tax credit, passed by the Legislature and signed by the Governor in 2019, provides a tax credit for donations to an Eligible Charitable Organization (ECO) or an Educational Services Charitable Organization (ESCO).

From the available funds, an individual is allowed a tax credit of up to \$1,000 filing jointly (\$500 single). A business is allowed a tax credit for up to 50 percent of its tax liability.

To make sure your gift is eligible for the full tax credit, an application for certification of the credit must be completed with the Mississippi Department of Revenue. The gift will be certified within 30 days based on the funds available in the credit fund. The certification will be submitted with the state tax return to receive the credit. ACT NOW! There is a limited amount of tax credit money available each calendar year.

Allocations are on a first come, first served basis based on the time and date the application is received by the Department. The Department will begin accepting applications for the 2022 calendar year on Saturday, January 1st, at 12:00 AM CST by email only. The Department will not be responsible for any technological problems preventing an e-mail from being delivered. E-mailed applications should be sent to [contributiontaxcredit@dor.ms.gov](mailto:contributiontaxcredit@dor.ms.gov). Since the Department is closed on January 1st and has no way to accept physical applications until January 3rd, applications by hand delivery or mail will be accepted beginning January 3rd at 8:00 AM CST.

The intent of the Children's Promise Act is to provide much-needed assistance to Mississippi's foster care systems and providers of educational services to disadvantaged students. Most non-profit 501(c)(3) schools should qualify as beneficiaries under the program. A complete list of Educational Services Charitable Organizations (ESCOs) can be found on the Mississippi Department of Revenue's website.

Eligible Charitable Organizations (ECOs) listed by the Department currently include:

<b>Baptist Children's Village</b>
<b>Berean Children's Home, Inc.</b>
<b>CARES Centers (dba Canopy Children's Solutions)</b>
<b>Catholic Charities, Inc.</b>
<b>Christians in Action, Inc.</b>
<b>Faith Haven, Inc.</b>
<b>First Place For Youth</b>
<b>Hope Village for Children</b>
<b>Lifeline Children Services, Inc.</b>
<b>Mississippi Children's Home Society (dba Canopy Children's Solutions)</b>
<b>Mississippi Families For Kids</b>
<b>New Beginnings International Children's &amp; Family Services, Inc.</b>
<b>Palmer Home for Children</b>
<b>Rescue 100</b>
<b>Sally Kate Winter's Memorial Children's Home</b>
<b>Southern Christian Services for Children and Youth, Inc.</b>
<b>Sunnybrook Children's Home</b>
<b>The United Methodist Children Home (aka Methodist Children's Home)</b>
<b>Youth Villages, Inc.</b>



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# MSCPA

## Young CPA Network

### MEET THE FIRMS

MSCPA visited many Universities for this year's Meet the Firms. These events provided an opportunity for accounting students to learn more about careers and opportunities within the accounting field, as well as network with representatives from accounting firms, companies, and other professional organizations in order to develop future contacts and employment prospects.



## MSU

YCPA President Ashley Sullivan and YCPA Treasurer John Luley attended Meet the Firms hosted by Mississippi State University on August 31, 2022. Also pictured are MSCPA President/CEO Karen Moody and Mississippi State University's Director of the Adkerson School of Accountancy Shawn Mauldin.



## OLE MISS

YCPA Board members Noah Davis and Cliff Kinney attended Meet the Firms hosted by the University of Mississippi on September 1, 2022. Also pictured MSPCA member Julia Jesuit.



## MISSISSIPPI COLLEGE

YCPA past President Kimberly Williams and YCPA Board Member Andres Posada attended Meet the Firms hosted by Mississippi College on September 6, 2022. Also pictured are MSCPA President/CEO Karen Moody, Director of Marketing and Communications Katelyn Strong, Professor Billy Morehead and Associate Professor Mark Morgan.

continued on page 9



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## SOUTHERN MISS

YCPA past President Lydia Windham and YCPA Board Members Andres Posada and Lindsay James attended Meet the Firms hosted by the University of Southern Mississippi on September 8, 2022. Also pictured are MSCPA President/CEO Karen Moody and Professor Amber Hatten.



## MILLSAPS COLLEGE

MSCPA Secretary Yale Murphy attended Meet the Firms hosted by Millsaps College on September 14, 2022. Also pictured are MSCPA President/CEO Karen Moody, Director of Marketing and Communications Katelyn Strong and Professor Dr. Jesse Beeler.

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# CHAPTER NEWS

## CENTRAL CHAPTER

MSCPA held a meet and greet reception in honor of Blaise Sonnier, JD, DBA, CPA on August 30 at the Ridgeland office. Effective July 1, 2022, Blaise joined the University of Southern Mississippi as the Director of the School of Accountancy and Jerold J. Morgan Distinguished Professor of Accounting.

This event was co-hosted by the Central Chapter. President Ed Simmons and Treasurer Steven Eilders are pictured below with Blaise.





## SOUTHEAST CHAPTER LUNCH AND LEARN

MSCPA's Southeast Chapter hosted a Lunch and Learn on Tuesday, September 27, 2022. This event was held at Cooperative Energy's Conference Center and heard from speakers Charles Naquin, CFE and Gabe Chatelain, MSF, CVA with Postlethwaite & Netterville. These speakers educated the chapter on the ABC's of Valuation and Forensic Services.



## PINE BELT SOCIAL

MSCPA held a Pine Belt Social after the University of Southern Miss Meet the Firms. This event was held at Scianna Hall on the USM campus Thursday, September 8th. Students, colleagues and other professionals were invited for an evening of food, drinks and networking, along with meeting the new School of Accountancy Director, Blaise Sonnier.

This event was co-hosted by the Southeast Chapter. Vice President Jay Babington is pictured next page with Karen Moody.

Special thanks to our sponsor McLeod & Rigel, P.A.







## GULF COAST CHAPTER

MSCPA's Gulf Coast Chapter hosted a Lunch and Learn on Wednesday, September 21, 2022. This event was held at Salute Italian Restaurant and heard from speaker Alison Baker from the Harrison County District Attorney's office. This event earned attendees 1 hour of CPE credit.







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# MSCPA Annual NOT-FOR-PROFIT Conference

MSCPA hosted our annual Not-for-Profit Conference on September 20, 2022. We got to hear from many great speakers on industry-specific insights needed to maintain a strong organization for themselves and their clients and how to be informed about the unique challenges they face in this profession. This year's speakers: Brian Yacker, Charles R. Lindsay, Tanya Webber, Sammy Moon, Stacey Gaines and Cerone F. Sturdivant. This year's panelists: Wil Crawford, Bill Felder, Gina Nelson, Allison Rooker, Angela Sumrall and Debbie Walker. MSCPA would like to thank the Not-for-Profit Committee, presenters, sponsors and attendees for making the conference a success. Chairman - Amie Dean, Millennial Chair - Cammy Nguyen



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# HEALTH CARE SERVICES CONFERENCE

MSCPA hosted our Health Care Services Conference on Thursday, September 22nd. 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. A big thank you to all our sponsors, speakers and committee members who made this conference a success. This year's Speakers: Shawn Stack, Drew Snyder, Daniel Champney and Richard Roberson. This year's Panelists: Gregg Gibbs, Chad Netterville, Lee McCall, Jim Jackson, Ed Tucker, Chris Anderson, Jeff Grimsley and Ken Dulaney. Chairman - Julia Jesuit; Millennial Chair - Andres Posada



COMMITTEE



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# Business Valuation and Litigation Services Conference

Thursday, November 17, 2022

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## Featured Topics

- View from the Bench – Chancery Court
- Family Law and the Financial Expert
- Issues with Goodwill
- Damage Calculations in Personal Injury & Wrongful Death
- Plus more

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# Annual Mississippi Tax Institute

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**WEDNESDAY, DECEMBER 7, 2022**  
**AND THURSDAY, DECEMBER 8, 2022**

8:30am-4:40pm

CPE Credits: 16

CLE Credits: 13.3

Price: \$400

(No optional sessions)

In-Person Attendance Requested

Exhibitors are back!

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

## CONFERENCE AGENDA

### Wednesday, December 7

- 8:00 – 8:20 Registration & Breakfast
- 8:25 – 8:30 Welcome & Announcements
- 8:30 – 10:00 Federal Tax Update  
*Gray Edmondson, Edmondson Sage Dixon, PLLC*  
*Damien Martin, FORVIS*
- 10:00 – 10:15 Break
- 10:15 – 11:25 Federal Tax Update Continued  
*Gray Edmondson, Edmondson Sage Dixon, PLLC*  
*Damien Martin, FORVIS*
- 11:25 – 12:10 Legislative Policy Update  
*Delbert Hosemann, Lt. Governor of MS*
- 12:10 – 1:10 Lunch
- 1:10 – 2:25 Taxpayer Advocate Services  
*Tambra C. Kyles, Taxpayer Advocate*
- 2:25 – 3:40 Financing the Estate Tax - A Comparative Analysis of How to Generate Instant Liquidity at Death  
*William M. Walker & T. Hudson Williams, Capital Strategies*
- 3:40 – 4:40 Cannabis Industry  
*Matthew McLaughlin, McLaughlin, PC*

### Thursday, December 8

- 8:00 – 8:20 Registration & Breakfast
- 8:25 – 8:30 Welcome & Announcements
- 8:30 – 10:00 Assault Upon the Constitution: Administrative Repeal of Conservation and Captive Insurance Inducement Statutes  
*David Aughtry, Chamberlain, Hrdlicka, White, Williams & Aughtry*
- 10:00 – 10:15 Break
- 10:15 – 11:25 SECURE Act  
*David Kemps, Morgan Stanley*
- 11:25 – 12:10 AICPA Tax Practice, Ethics and Advocacy  
*Jan Lewis, AICPA Tax Executive Committee Chairman*
- 12:10 – 1:10 Lunch
- 1:10 – 2:25 MDOR - State Tax Update  
*Jan Craig, MDOR*  
*John Fletcher, Jones Walker*
- 2:25 – 2:40 Break
- 2:40 – 3:40 Post Election Estate Planning Update  
*Stephen R. Akers, Bessemer Trust*
- 3:40 – 4:40 Digital Assets & Their Tax Implications  
*Peyton Gordon, FORVIS*

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