



MSCPA

MISSISSIPPI SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS
OCTOBER 2024

CPA DAYS OF SERVICE

November 4 – 15, 2024

Join the MSCPA's annual CPA Days of Service to unite with CPAs, co-workers, and accounting students in your local community for two weeks of giving back.

You can volunteer at a place of your choice, take part in a food drive, or select from provided options on our website's sign-up page. Opportunities are organized by chapter, allowing for individual or team participation on a date that suits you. Your participation through the website is crucial for the Society to acknowledge your contributions. Visit www.ms-cpa.org to sign up!

CURRENT VOLUNTEER OPPORTUNITIES BY CHAPTER (more to follow)

Central:
MadCAAP
Little Lighthouse

Delta:
TBD

East Central:
TBD

Gulf Coast:
Elijah's Closet

North Central:
Salvation Army

Northeast:
St. Luke Food
Pantry

Northwest:
Oxford Food
Pantry

Southeast:
Edwards Street
Fellowship
Silly Sock Drive

Southwest:
Stewpot

IN MEMORIAM

FRED GENE RAY
Madison, MS
Died September 12, 2024

MEMORIAL GIFT

To the
EDUCATION FOUNDATION

In memory of
MARTHA B. "MOLLY" NICKEY
Jackson, MS

by
Hugh J. Parker
Madison, MS

In memory of
FRED GENE RAY
Madison, MS

by
Hugh J. Parker
Madison, MS

MOST NEEDED FOOD ITEMS

Canned Fruits
Canned Meats (Chicken,
Tuna or Corned Beef)
Canned Soup
Canned Vegetables
Dry Beans
Dry or Evaporated Milk

Grits
Oatmeal
Spaghetti
Macaroni
Rice
Peanut Butter

Ways to Get Involved!

Anything that benefits your community counts. Sign up to donate to a charity drive or for charity service in your chapter area or plan an activity of your own.

T-Shirts

Wear your Day of Service t-shirt when you volunteer! If you do not have one, contact athorn@ms-cpa.org or 601-856-4244. Stock is limited.



Share on Social Media & MSCPA!

Take pictures of volunteer activities in your t-shirts and tag @MSSocietyofCPAs and use the hashtag #MSCPAserve2024. Email your photos to athorn@ms-cpa.org.

SIGN UP TODAY!
MS-CPA.ORG



TV Show-Themed Contest & Awards Luncheon

Join the canned food drive contest during Days of Service! Compete in **Most Food Collected**, **Most Cash Collected**, and **Best TV Show-Themed Food Display**. Submit photos and totals to athorn@ms-cpa.org by 9 AM on Friday, November 15. Then, come to the Awards Luncheon at 12 PM at the MSCPA in Ridgeland, where winners will be voted on and announced. We hope to see you there!



*Published
by the
Mississippi Society of
Certified Public Accountants*

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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.

Follow us on social media!



Welcome New Members

Bailey Jones

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Carr, Riggs & Ingram, LLC
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Tove L. Mullins

Gainspoletti & Associates, PA
Cleveland

Jennifer Owen

Gulf Coast Community Federal Credit
Union
Gulfport

Jay D. Philpott

Community Foundation for Mississippi
Jackson

Mark Your Calendar!

FRIDAY, DECEMBER 13, 2024

- BOARD OF GOVERNORS MEETING**
2:00 p.m.
MSCPA, Ridgeland, MS
- BOARD OF GOVERNORS &
PAST CHAIRMEN CHRISTMAS GALA**
6:00 p.m.
Mississippi Sports Hall of Fame, Jackson, MS

MSCPA Marriage Announcement

Noma Gillis Burge

Congratulations to our Director of Membership, Noma Gillis, and Scott Burge on their beach wedding on September 28, 2024.

We wish them a lifetime of love, joy, and happiness as they begin this exciting new chapter together!

Send her your congratulations at ngillis@ms-cpa.org.



Member News



Turner

Turner Honored by Ole Miss Alumni Association

Jon C. Turner was recently honored as a 2024 Distinguished Alumni by the Ole Miss Alumni Association, where he received the prestigious Alumni Service Award for his dedicated service to both the university and the Alumni Association. The Alumni Association traces its roots back to 1852 when the first graduating class of the University of Mississippi established the Alumni Society.

Jon is a retired partner from the Jackson office of BKD, LLP - CPAs & Advisors (now FORVIS Mazars), where his public accounting experience with several firms spanned 40+ years and multiple industries, and included audit, tax and strategic consulting services, as well as a managing partner role for the firms. Post retirement he continues to perform profitability analyses for small businesses and litigation support on a limited basis and remains in the community as a member of several boards. Jon was selected as the winner of the 2013 MSCPA Public Service Award for his community and statewide civic involvement.



Cruthird Graduates from 2024-2025 Leadership Gulf Coast Program

Caitlin Cruthird, a Tax Senior Manager at HORNE, was recently named a graduate of the 2024-2025 Leadership Gulf Coast program, a prestigious initiative run by the Mississippi Gulf Coast Chamber of Commerce.

The Leadership Gulf Coast program is a 10-month initiative designed to equip emerging leaders with the tools to address the Mississippi Gulf Coast's challenges and opportunities. Graduates of the program gain a deeper understanding of community issues and build a network of leaders committed to improving the region.

Photo: Cruthird is pictured middle of second row from bottom in pink.



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MSCPA Attends 2024 Policy Summit

MSCPA President & CEO Karen Moody and MSCPA Legislation Committee Member Tony Huffman attended Speaker Jason White's 2024 Policy Summit on September 24 at The Sheraton Refuge in Flowood. The Summit focused on a deep dive into Mississippi's prospects for tax reform.

Tax reform experts and lawmakers collaborated to explore solutions as the House of Representatives examined Mississippi's tax code and identified opportunities to reduce the tax burden on Mississippians, including elimination of income tax and a reduced grocery tax.

Attendees heard from Governor Tate Reeves, Speaker Jason White, key lawmakers, tax expert Grover Norquist, Arkansas Rep. Les Eaves, and business leaders from MML, MMA, BIPEC, and MDOT.



Speaker White

Photos Credit: Jason White Twitter @JasonWhiteMS



Panelist Discussion



Gov. Reeves

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State Board Meets at Mississippi State University



The Mississippi State Board of Public Accountancy convened for its regularly scheduled meeting on September 19, 2024, at Mississippi State University. Dr. Shawn Mauldin, Director and Professor of the MSU Adkerson School of Accountancy, welcomed members and acknowledged faculty and students present.



In attendance were Dr. Annette Pridgen, Chair; Gary Walker, Vice-Chair; Willie Sims, Jr., Secretary; and members, Dr. Rick Elam, William Kelly, and Charles Prince from the State Board.

Also present from the Board staff were Sharee Brewer, Executive Director, and Elizabeth Greenwood, Associate Director and Investigator. Representing the Mississippi Society of Certified Public Accountants was Karen Moody, and Alexis Morris represented the Mississippi Attorney General's Office.



Following the meeting, the MSU Adkerson School of Accountancy hosted a luncheon for the attendees, which included additional MSU accounting students. This gave students the opportunity to engage directly with Board members, who shared insights about the licensing process and encouraged them to pursue CPA certification.

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Nominate a Member for MSCPA Officer

The MSCPA Nominations Committee is seeking nominations from the membership for the 2025-2026 candidate slate. Members will elect a Vice-Chairman/Chair-Elect, Treasurer, Secretary, and an At-Large Member to the Board of Governors at the 2025 MSCPA Annual Meeting in Destin, FL.

Submit Nominations by December 1

You are invited to send names of suggested candidates to Jerry Goolsby, Nominations Committee Chairman, at jerryngoolsby@gmail.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.

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Exempt Organizations



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

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

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



Jackson Office - 5 River Bend Place, Suite A, Flowood, Mississippi 39232 - Phone: (601) 981-6336

Gulfport Office - 1105 30th Avenue, Ste. 204, Gulfport, Mississippi 39501 - Phone: (228) 868-0197



MSCPA

Young CPA Network

CHRISTMAS SOCIAL 2024

The MSCPA Young CPA Network is thrilled to invite you to our **CHRISTMAS SOCIAL** on Wednesday, December 18, 2024, from 6:00-8:00 p.m. at Georgia Blue, Event Hall, 202 Baptist Drive, Madison, MS.

Join us for an evening of fun games, exciting prizes, and a chance to win **BIG** with our **\$200 drawdown!** Don't forget to bring a toy for **Toys for Tots** and help spread holiday cheer!

Please RSVP by Wednesday, December 11 to laurenvherzog@gmail.com to let us know you're coming. We can't wait to celebrate the season with you!

There's no cost to attend, and the dress code is casual. *Students are invited!*



Christmas Social

DECEMBER | **18** | 6 - 8 PM

WEDNESDAY

Join the MSCPA Young CPA Network for an evening of fun games, exciting prizes, and a chance to win **BIG** with our **\$200 drawdown!**

Don't forget to bring a toy for **Toys for Tots** and help spread holiday cheer!

**GEORGIA BLUE, EVENT HALL
202 BAPTIST DR, MADISON, MS**

There is no cost to attend, and the dress code is casual.

**RSVP BY WEDNESDAY, DECEMBER 11 TO
LAURENVHERZOG@GMAIL.COM**



Why It's Important to Maintain Prior Acts Coverage

Do Not Lose Coverage for Your Prior Acts!

By: CAMICO, July 25, 2024

Most Accountants Professional Liability insurance policies are “claims made and reported” policies. Two important features of claims made and reported policies include:

1. The insurance applies only to claims that are first made and reported to the insurance company during the policy period.
2. The insurance provides coverage for professional services performed from the Retroactive Date (or “Prior Acts Date” or “Initial Effective Date”) to the expiration date of the policy as stated in the **Declarations**.

The **Retroactive Date** is the **earliest date** from which the policy provides coverage for an act, error or omission from which a claim for damages arises. Claims arising from professional services performed **prior** to the policy’s Retroactive Date are not covered. The Retroactive Date is normally first established at the onset of the firm’s first policy and continues to follow the renewal of that policy for as long as the policy is continuously renewed without any lapses in coverage.

A firm that is changing from one insurance carrier to another must make the change seamlessly to avoid losing the Retroactive Date. If a lapse occurs and that continuity is broken (i.e., the policy not renewed continuously), the initial Retroactive Date is lost, and

a new policy will most likely have a new Retroactive Date that is advanced to the inception date of the new policy.

The advancement of the Retroactive Date causes the firm to lose the coverage that it had with an older Retroactive Date, and past professional services that were previously covered would no longer be covered. **Firms should always maintain “seamless” coverage, with no lapses in the policy along the way, to ensure coverage for professional services performed back to the original Retroactive Date.**

We encourage you to return your application(s) as early as possible to avoid any gaps in coverage. In any event, **return your application(s) before your current coverage expires.**

Do not assume that insurers will ignore a late-returned application(s) and backdate coverage to allow you to maintain your Prior Acts Coverage, as they are in no obligation to do so. **Please contact your underwriter or agent with any questions or requests for additional information.**

Disclaimer: This information is provided as a general overview and is not intended to be a complete description of all applicable terms and conditions of coverage. The precise coverage afforded by any insurer is subject to the actual terms and conditions of the policies as issued.

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CHAPTER NEWS

GULF COAST CHAPTER

MSCPA's Gulf Coast Chapter hosted a family **Fall Social** at the Mississippi Aquarium in Gulfport, MS on October 5. They enjoyed a wonderful lunch followed by a tour of the aquarium. Thank you to the members who attended and thank you to the Gulf Coast Chapter for organizing such a successful event!



CENTRAL CHAPTER

Join us for our upcoming **Lunch & Learn** sessions at the MSCPA Training Center in Ridgeland, MS. These informative sessions will offer great opportunities to expand your knowledge, network with fellow professionals, and enjoy a delicious meal.

Tuesday, November 19, 2024
Professional Ethics in the Age of Artificial Intelligence
Barber Boone, Butler Snow
Employer Fraud
Joel Jasper, Morgan White Group, Inc.

Thursday, January 30, 2025
Mississippi Tax Reform Update
John Fletcher, Jones Walker
Labor Market in Mississippi
Courtney Taylor, AccelerateMS

Register at www.ms-cpa.org/membership/chapters/CE:central

NORTHEAST CHAPTER

Join the Northeast Chapter for the **Tax Seminar** on December 3 at the Cadence Bank Conference Center in Tupelo, MS! This event will feature the latest tax updates, expert speakers, and valuable networking opportunities. It's a must-attend for CPAs, tax professionals, and financial advisors looking to stay informed and connected. Mark your calendar—more details coming soon!

Calling All Chapters!
GOT NEWS? SHARE IT WITH US!
Send your news to athorn@ms-cpa.org.

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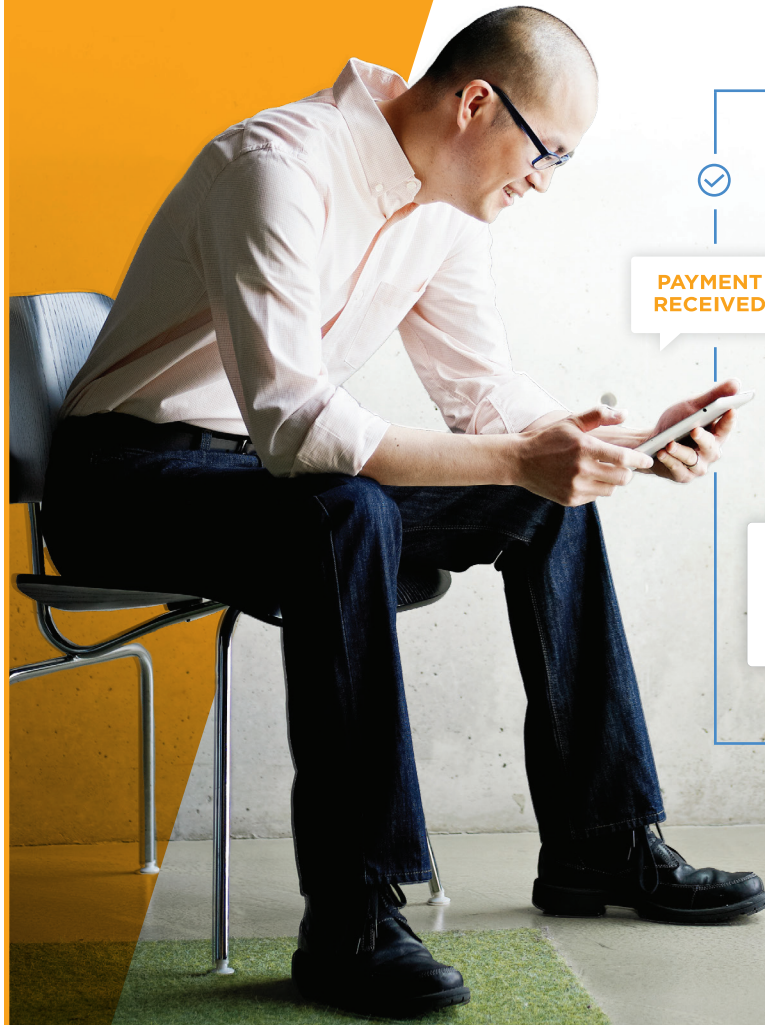
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NEW! Beneficial Ownership Reporting: Planning Your Firm's FinCEN Filing Strategy

Wednesday, November 20, 2024

11:00 a.m. – 12:00 p.m.

CREDIT: 1 MEMBER COST: FREE NON-MEMBER COST: \$40

*****LIVESTREAM ONLY*****

Did you know that there are currently more than 33 million U.S. businesses who have yet to file their beneficial ownership report (BOI) and that 70% of business owners are looking to service providers like their CPAs to file it for them? If your firm is not capitalizing on the new service offering for your clients, you are putting your clients at risk and missing out on new revenue opportunities. Join us for a **FREE** CPE course on the impact of the Corporate Transparency Act on the Accounting industry and how to incorporate FinCEN filings into your service portfolio. Charles Wismer, CEO of FincenFetch, breaks down the filing process and shows firms of all sizes how to keep your clients compliant and your bottom line growing.

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CONFERENCES

HEALTH CARE SERVICES CONFERENCE

MSCPA hosted our Health Care Services Conference on September 19, 2024. 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 were **Andrew Donahue**, Healthcare Financial Management Association; **Bryan Allison**, XCELERATE Technology & Consulting, LLC; **Austin Miller**, Frazier & Deeter; **Jennifer Wentworth**, Mississippi Division of Medicaid; **Shane Hariel**, Carr, Riggs & Ingram, LLC; **Shenika Russell**, Perry County General Hospital; **Florence Bauer**, HORNE; **Jason Brooks**, Watkins, Ward and Stafford, PLLC; **Baxter Howell**, Forvis Mazars, LLP; **Andy Williams**, Forvis Mazars, LLP; and **Kevin Blackwell**, Mississippi State Senator. Chairman: **Julia Jesuit**; Millennial Chair: **Andres Posada**



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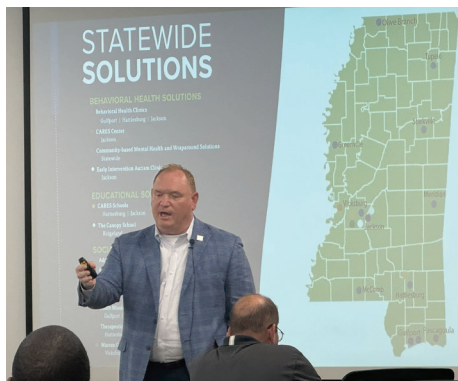
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NOT-FOR-PROFIT CONFERENCE

MSCPA hosted our annual Not-for-Profit Conference on September 26, 2024. We heard 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 included **Kassi Rushing**, Kassi Rushing Consulting; **Brian Yacker**, Baker Tilly; **Jane Alexander**, Community Foundation for Mississippi; **Amanda Crawford**, Mississippi Nurses Foundation; **John Damon**, Canopy Children's Solutions; **Matt Milliman**, Mercy House Adult & Teen Challenge; **Lee Stringer**, 5th Squad; **Tanya Webber**, Mississippi Secretary of State's Office; **John Damon**, Canopy Children's Solutions; **Donna Ladd**, Mississippi Free Press; **Maura McDevitt**, BMSS, LLC; **Steven Mulhollen**, Mississippi College; and **Eric B. Tisdale**, BT Advisors. **BMSS Advisors & CPAs** hosted a Mixer following the conference at Sombra Mexican Kitchen in Ridgeland. 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: **Miya Bates**



Business Valuation & Litigation Services Conference

Thursday, November 21, 2024

IN-PERSON and LIVESTREAM at the MSCPA Training Center in Ridgeland, MS

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

CREDITS:

8

MEMBER PRICE:

\$200

Agenda

- | | |
|------------|--|
| 7:45 a.m. | Breakfast & Networking |
| 8:30 a.m. | Hot Topics in Business Valuation and Litigation Services
<i>Robert D. King, EAG Gulf Coast, LLC, a subsidiary of Eisner Advisory Group, LLC (this is not a CPA firm)</i> |
| 9:30 a.m. | Rules 29 and 702 Updates
<i>Stephen Fritz, Bradley Arant Boult Cummings LLP</i> |
| 10:20 a.m. | Break |
| 10:30 a.m. | M&A Transactions and Current Trends
<i>William Morgan, Jackson, Tullos, Rogers & Morgan, PLLC</i> |
| 11:20 a.m. | Gift and Estate Tax Rules and the Impact to Valuation Professionals
<i>Jody E. Varner, Brunini Firm</i> |
| 12:10 p.m. | Lunch Break |
| 1:00 p.m. | Insurance Fraud
<i>Thomas Dunbar, Ross & Yerger Insurance Inc.</i> |
| 1:50 p.m. | Attacking and Defending Personal Injury and Wrongful Death Economic Damage Calculations
<i>James A. "Jim" Koerber, EAG Gulf Coast, LLC, a subsidiary of Eisner Advisory Group, LLC (this is not a CPA firm)</i> |
| 2:40 p.m. | Break |
| 2:50 p.m. | Judges Panel
<i>Rachel K. Kinzer, Moore Colson CPAs and Advisors; Troy Odom, Chancellor for the Twentieth Chancery District, Place 2 (Rankin County, Mississippi); and Randy G. Pierce, Mississippi Supreme Court (former), Chancellor for the Sixteenth Chancery Court District (former), and Mississippi House of Representatives (former)</i> |
| 4:20 p.m. | Door Prizes & Adjourn |

TO REGISTER, VISIT:

WWW.MS-CPA.ORG



MISSISSIPPI TAX INSTITUTE

DECEMBER 16-17, 2024

In-Person and Livestream
at the Sheraton-The Refuge in
Flowood, MS

In-person attendance encouraged!

CPE Credits: 16 · CLE Credits: 13.3 · Price: \$400

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.

REGISTER ONLINE AT WWW.MS-CPA.ORG

Attendees are invited to join us for a **ROOFTOP RECEPTION** on Monday, December 16, directly after the day's events.

TOPICS

Federal Tax Update

Supreme Court Rulings Update

Estate Planning

R&D / Solar Tax Credits

179D & Energy Tax Credit

Navigate Buy-Sell Strategies Post-Supreme Court Ruling on Life Insurance in the Connelly Case

Washington Federal Tax Landscape Post Election

Conservation Easements

Legislative Update

MSDOR Update

Reserve your room at the Sheraton in Flowood, MS, **no later than December 4!**

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- North MS/Metro Memphis – Gross \$1.25M - SOLD
- Rankin County, MS – Gross \$518k – SOLD
- East Memphis Suburb – Gross \$950k – SOLD
- Memphis, TN – Gross \$708k – SOLD
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PRACTICES FOR SALE:

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- Pascagoula area Enrolled Agent grossing \$220K *Price Reduced*
- Birmingham, AL tax practice grossing \$300K *Sale Pending*
- Birmingham, AL CPA grossing \$470K *Sale Pending*
- Chattanooga CPA grossing \$290K *New*
- South of Knoxville, TN CPA grossing \$440K *Available*
- Dyersburg, TN area CPA grossing \$320K *Available*
- Upper Cumberland, TN CPA grossing \$975K *Available*
- Knoxville CPA grossing \$515K *Sale Pending*
- Crestview, FL area (Panhandle) CPA grossing \$365K *Available*

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