



## 2025-2026 CANDIDATES Officers Announced

The MSCPA Nominations Committee reports the candidates for officers/director for the 2025-2026 year. The election is scheduled for Saturday, June 21, 2025, during the Annual Business Meeting at the Sandestin Golf & Beach Resort, Destin, Florida. Absentee ballots for members who will be unable to attend the Business Meeting will be available later this spring.

### Chairman

Anita Goodrum, *Eupora*

### Secretary

Shannon Adams, *Ridgeland*

### Vice-Chairman/Chairman-Elect

Kimberly Williams, *Ridgeland*

### At-Large Board Member

Stacy Thomas, *Jackson*

### Treasurer

Rob King, *Hattiesburg*

### Education Foundation Trustee

Samantha Moore, *Ridgeland*

Members of the Nominations Committee included: Jerry Goolsby, Chairman, Canton; Allison Wilson, Bolton; Ed Jones, Pascagoula, Noah Davis, Meridian; Scott Adams, Natchez, Clyde Herring, Starkville; Steven Eilders, Ridgeland.

## IN MEMORIAM

GEORGE MADISON HARRGILL

*Clinton, MS*

Died December 4, 2024



## MEMORIAL GIFT

To the  
EDUCATION FOUNDATION

In memory of  
LOUIS DAWKINS

*Starkville, MS*

By  
**John Scott**  
*Ridgeland, MS*

and

By  
**Archie P. McKinnis**  
*Gallatin, TN*

## Win a **Free** Registration or Sandestin Stay!

### Register for Convention by May 1 to Enter to Win a FREE Registration

Register early for convention to help us plan effectively! By registering early, you could win **FREE Convention Registration!** Details are available on our webpage under the CPE tab, [www.ms-cpa.org/education/annual-convention](http://www.ms-cpa.org/education/annual-convention).

**ENTER:** To enter, complete your registration by May 1. Spouse/guest registrations are not eligible.

**GRAND PRIZE:** The grand prize winner will receive a refund of their General Registration fees, paid via credit card or check.

**GENERAL RULES:** The winner will be selected randomly and notified initially via phone and/or email. No substitutions or transfers allowed.

To register online or download a printable form, visit [www.ms-cpa.org/education/annual-convention](http://www.ms-cpa.org/education/annual-convention).

*Brochures will be mailed next month.*

### Book Your Room Now for a Chance to Win a FREE Sandestin Getaway

Book your room directly with Sandestin by May 1 to be automatically entered. Prize includes a **FREE two-night stay at the Sandestin Beach and Golf Resort** in Destin, Florida. The winner will be selected in a random drawing during Convention.

Group Code: **25126G**

Phone: **1-800-320-8115** • Book Online: <https://shorturl.at/V7KKz>

*We recommend making reservations by phone. Not all rooms display on the website.*



*Photo Credit: Sandestin Golf & Beach Resort*



*Published  
by the*

*Mississippi Society of  
Certified Public Accountants*

306 Southampton Row

The Commons

Highland Colony Parkway

Ridgeland, MS 39157

PHONE: (601) 856-4244

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EMAIL: [memberservices@ms-cpa.org](mailto:memberservices@ms-cpa.org)

WEBSITE: [www.ms-cpa.org](http://www.ms-cpa.org)

## OFFICERS

### *Chairman*

Tom Walker

JACKSON

### *Vice Chairman/Chairman-Elect*

Anita Goodrum

EUROPA

### *Treasurer*

Philando Brown

JACKSON

### *Secretary*

Lydia Windham

JACKSON

### *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

**John Corkern**

HORNE

Ridgeland, MS

**Kimberly Fitts**

McKenzie CPA, PLLC

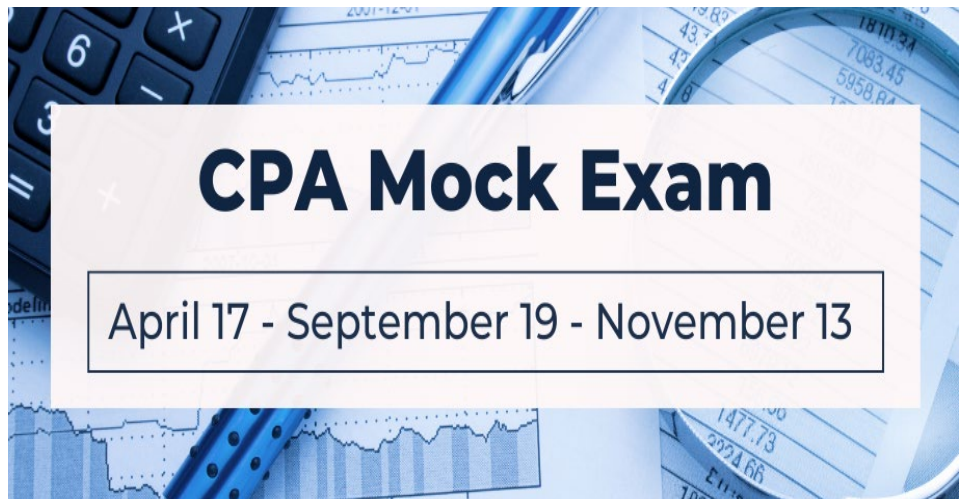
Madison, MS

## 2025 CPE Catalog is Now Online

*Start planning your CPE today!*



MSCPA is excited to provide you with a new online catalog of our 2025 CPE course offerings. MSCPA is dedicated to offering the highest quality, highest value continuing education programs to our members. Your support is critical to our success! Thank you for choosing the MSCPA as your provider of continuing education.





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# Member

## Allison Appointed to Airports Council International Finance Steering Committee



Allison

**Kim Allison** has been appointed to the Airports Council International-North America (ACI-NA) Finance Steering Committee to a 4-year term as a small-hub airport representative. While any airport finance professional can serve on the larger Finance Committee, selection to a coveted position on the Finance Steering Committee requires a nomination to this leadership group. There are 29 members currently serving chosen from airports of all sizes across the nation and Canada.

The purpose of the ACI-NA Finance Committee is to create a platform of information sharing among airports to improve the economic health of the airport industry. Members work together to influence legislative changes affecting the industry with organizations such as GASB, FAA, and TSA. They also facilitate conferences that provide continuing professional education and networking opportunities.

Kim has been in the role of Vice-President and Chief Financial Officer of Tucson Airport Authority for two years. She previously served as Chief Financial Officer of Gulfport-Biloxi Regional Airport Authority for three years. Prior to that Kim was in various industry and public accounting roles for 26 years.

Kim served as President of the MSCPA Gulf Coast Chapter and was instrumental in reviving the Chapter to its current flagship status for continuing professional education opportunities and networking events, many of which members from around the state attend. She also served on the Board of Governors and the Industry Committee. While we hated seeing her move to Arizona, Kim still maintains her MSCPA membership. She also served on the University of Southern Mississippi Accounting Advisory Board.

## Morehead Attends AGA National Leadership Conference in Washington, D.C. With Students



From L to R: Rebecca Stafford, Professor Billy Morehead, and Brooke Neal

Brooke Neal and Rebecca Stafford, two Mississippi College School of Business accounting majors, and **Billy Morehead** attended the AGA #NLT25 in Washington, DC. Both were 2 of 12 students, nationwide, who won AGA National Leadership Scholarships to provide this opportunity for the trip to DC! Mississippi College is the only University with two students who received the 2025 scholarship!



# MSCPA 2025 ANNUAL CONVENTION

*Agenda Announced • June 18-22, 2025*

The **MSCPA 2025 Annual Convention and Business Meeting** will be held at the Sandestin Golf and Beach Resort in Destin, Florida. This year's theme is *Stars, Stripes, and Strategic Solutions*. Chairman Tom Walker extends an invitation to all MSCPA members and friends of the Society to attend! Convention registration begins Thursday, June 19, at 1:00 p.m. in the Azalea Foyer. Stop by to pick up your packet, gifts, and a welcome refreshment.

## THURSDAY NIGHT

### GRAND OPENING RECEPTION

THURSDAY, JUNE 19 • 7:00 – 8:45 P.M.

The grand opening reception starts at 7:00 p.m. in the Azalea Ballroom, and members will be greeted by the current MSCPA officers. **NEW** this year is a magic mirror photo booth. Come to the reception dressed in patriotic colors for an unforgettable evening!

## KEYNOTE SPEAKER SESSIONS

Members who register and attend on Friday morning will have the opportunity to earn 2 additional hours of CPE



Melanie Lauridsen

### The Landscape of Washington Post-Election

Instructor: Melanie Lauridsen

FRIDAY, JUNE 20 • 9:00 – 10:00 A.M. •

CREDITS: 1 GENERAL

The landscape of tax and policy legislation in Washington, D.C. is shifting post-election. With the new balance of power in Congress, this session will provide insight into legislative

priorities, tax reforms, and regulatory shifts that impact businesses and individuals. Melanie will provide actionable analysis essential for CPAs, executive policy makers, and investors looking to stay ahead of legislative developments that could impact the economy, business strategy, and financial planning. Melanie is the AICPA Vice President of the Tax Policy & Advocacy team in Washington. She is responsible for the review, formulation, and submission of federal tax technical and policy recommendations to Congress, Treasury, and the IRS.



Janine Stange

### Choose to Rise: 5 Keys to Maintain Balance + Ignite Momentum

Instructor: Janine Stange

FRIDAY, JUNE 20 • 10:30 – 11:30 A.M. •

CREDITS: 1 GENERAL

Disruption is the new norm. The ability to adapt and thrive is paramount. Janine shares five keys to maintain balance and spark momentum when it is needed most. Discover actionable strategies to empower yourself both personally and professionally. Prepare to confront that challenge you've been procrastinating on and leave equipped with tools to conquer it head-on. Janine is best known for her historic journey to sing the Star-Spangled Banner in all 50 states – a mission she embarked on to honor our brave. Her story is the subject of the documentary "National Anthem Girl" now streaming on Amazon Prime and Apple TV.

## CPE SESSIONS & SPEAKERS

Earn up to 16 hours of CPE on Wednesday and Thursday



Bob Mims

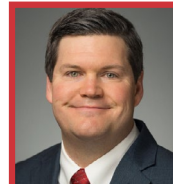
### Current Challenges and Crucial Skills for CPAs

Instructor: Bob Mims

WEDNESDAY, JUNE 18 • 8:30 A.M. – 12:00 P.M. •

CREDITS: 4 GENERAL

Growing our skillsets in weaker skillsets may not be fun, but it is the lowest hanging fruit. We are great at the analysis of things but sometimes don't devote the time to planning and presenting crucial information to our stakeholders. We will dive into a fresh look at examples in decision making regarding accounting using common sense, then map out how best to communicate issues in an ever-changing environment and economy while identifying the top ten crucial skills for 2025.



Wil Crawford

### Exploring Ethics

Instructor: Wil Crawford

WEDNESDAY, JUNE 18 • 1:00 – 4:30 P.M. •

CREDITS: 4 GENERAL

Join us for an insightful session as we discuss ethics. Topics will include why we learn about ethics, where our ethics come from, using a code of ethics, solving ethical dilemmas, and working with the AICPA's Ethics Decision Tree for CPAs. We'll also use an interactive case study and explore rationalization, bias, and other moral topics. This seminar satisfies the State Board's requirement for three hours of general ethics and one hour of Mississippi Rules and Regulations

### Unmasking Fraud: A Deeper Dive

Instructor: Wil Crawford

THURSDAY, JUNE 19 • 8:30 A.M. – 12:00 P.M. • CREDITS: 4 GENERAL

How does fraud happen? Why does fraud happen? How can we prevent fraud? In this session we'll seek to answer those questions and more through an analysis of the fraud triangle, the ACFE's Report to the Nations, and the ACFE's fraud tree. We'll do a deep dive into two fraud stories to learn how pressure can cause good people to make bad decisions.

### Survive and Thrive Against Pressing Hazards and Customer/Employee Issues

Instructor: Bob Mims

THURSDAY, JUNE 19 • 1:00 – 4:30 P.M. • CREDITS: 4 GENERAL

In the dynamic landscape of modern business, the roles of both private and public practitioners extend far beyond financial management; they encompass navigating an array of external and internal uncertainties that can impact organizational performance and sustainability. This seminar will empower CPA professionals with the foresight and practical tools needed to understand, anticipate, and mitigate both external and internal exposure. We will also build a fresh non-accounting view of our customers and employees as we seek to understand what they value. We must be aware and anticipate. Essential for leaders and organizations that want to survive and thrive.



# Convention Activities

## FRIDAY

### Golf Tournament

FRIDAY, JUNE 20 • 1:00 P.M.

Includes green and cart fees, tournament registration, and refreshments. Make your reservation by May 31 to guarantee availability. Tee time is offered on a space-available basis after the cutoff date.



### Pickleball

FRIDAY, JUNE 20 • 1:30 P.M.

Making a big splash last year, this exciting sport returns again. Don't miss out on the fun!

### Deep Sea Fishing

FRIDAY, JUNE 20 • 1:30 P.M.

Includes fishing license, bait, tackle, fish cleaning and refreshments on board the Destin Princess. Advance registration is recommended. **This trip usually sells out!**



### Free Evening

This year's convention schedule again features a free evening Friday night for members to enjoy the benefits of the Resort, and sponsors and exhibitors will have ample free time for networking.

## SATURDAY

### Annual Business Meeting

SATURDAY, JUNE 21 • 9:00 A.M.

Officers for the 2025-2026 fiscal year will be elected, and reports will be presented. Members who have won the Public Service Award and Outstanding Educator Award will also be honored. CPA Exam Medal Winners will be recognized, as will the recipient of the Rising Star Award.

Following the morning refreshment break, members will gather in the main meeting room at 11:20 a.m. for exhibitor prize drawings.

### Volleyball Tournament and Beach Party

SATURDAY, JUNE 21 • 1:30 P.M.

This event will be behind The Beach House. Tents will be arranged, where sponsors will be offering giveaways and door prizes alongside the provision of a keg and snacks. Get your teams together now!



**REGISTER FOR  
CONVENTION TODAY!**

To register for convention, visit  
[www.ms-cpa.org](http://www.ms-cpa.org) or see page #7.



## SATURDAY NIGHT RECEPTION, DINNER, AND SPECIAL ENTERTAINMENT

SATURDAY, JUNE 21 • 6:30 P.M. RECEPTION & 7:30 P.M. DINNER

Members, spouses, guests, sponsors and exhibitors return to the Conference Center on Saturday evening for the reception at 6:30 p.m., followed by dinner at 7:30 p.m. Chairman Tom Walker will introduce newly elected officers, with Chairman-Elect Anita Goodrum's gavel exchange marking the beginning of her term. The Bailey Trophy will be awarded to the winning volleyball team.

**NEW** this year is a less structured evening with more time to visit throughout the dinner. Background music will be performed by singer and musician **JARED HERZOG** who gained national recognition as a contestant on *The Voice* Season 17 in 2019. Jared impressed the judges with his soulful voice and heartfelt performances, earning a spot on John Legend's team. He currently performs at venues across the country.

The evening will conclude with a \$2,000 drawdown (**doubled from last year!**) and a prize money and Sandestin getaway drawings. Members are encouraged to visit exhibitors' booths on Friday and Saturday to get their convention cards stamped to be eligible for the prize money. Members who booked a room in the MSCPA block by May 1 will be eligible for the Sandestin getaway.

## SUNDAY

### Prayer Breakfast

SUNDAY, JUNE 22 • 8:00 A.M.

The traditional Sunday morning Prayer Breakfast will close the 2025 meeting. Don't miss a special guest devotional speaker PLUS music by Saturday night's singer **JARED HERZOG!**

## SPOUSES EVENTS

FRIDAY, JUNE 20 • 9:00 A.M.

Enjoy a full breakfast while watching or participating in a pasta making demonstration of various shapes and colors PLUS samples and recipes for everyone. Lots of prizes will be given away. You don't want to miss this!



FRIDAY, JUNE 20 • 10:30 A.M.

Spouses are invited to listen to keynote speaker Janine Stange.  
SATURDAY, JUNE 21 • 9:00 A.M.

Bingo will be held in the Camellia Room with prizes made possible by the MSCPA Chapters.

## CHILDREN ACTIVITIES Ages 4-12

**Registrations are required. Only register children attending activities.**

THURSDAY, JUNE 19 • 6:30 – 9:00 P.M.

Arts, crafts, games, movie, and snacks.

FRIDAY, JUNE 20 • 8:30 A.M. – 12:00 P.M.

Lawn and pool party with games and snacks.



SATURDAY, JUNE 21 • 6:00 – 9:30 P.M.

Carnival with entertainment, arts, crafts, games, movie, and dinner.



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MSCPA 2025 Annual Convention:

**REGISTRATION FORM**

June 18-22, 2025 • Sandestin Golf and Beach Resort | Destin, FL

**PRIMARY REGISTRATION**

As a member, is this the first time you have attended the MSCPA Annual Convention?  Yes\*  No

Name \_\_\_\_\_ Company \_\_\_\_\_

Address \_\_\_\_\_ City/State/Zip \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

For planning purposes, will the registered member and spouse/guest attend Saturday night's banquet?  Yes  No

\_\_\_\_\_ \*MEMBER FIRST TIME ATTENDEE GENERAL REGISTRATION (approved for 2 CPE credits)..... \$275  
Includes welcome reception, three breakfasts, two speaker presentations, Friday box lunch,  
Saturday beach party/volleyball tournament, reception, banquet, and special entertainment.

\_\_\_\_\_ GENERAL REGISTRATION ..... \$335  
Includes welcome reception, three breakfasts, two speaker presentations (approved for 2 CPE credits),  
Friday box lunch, Saturday beach party/volleyball tournament, reception, banquet, and special entertainment.

\_\_\_\_\_ SPOUSE/GUEST REGISTRATION ..... \$175  
Includes welcome reception, three breakfasts, Friday morning demonstration/prizes, Friday box lunch,  
Saturday bingo/prizes, beach party/volleyball tournament, reception, banquet, and special entertainment.

Spouse/Guest Name: \_\_\_\_\_

\$ \_\_\_\_\_  
SUBTOTAL

**CPE SEMINAR SELECTION**

\_\_\_\_\_ Wednesday, June 18 • 8:30 a.m. – 12:00 p.m. • CPE Credit: 4 ..... \$165  
Current Challenges and Crucial Skills for CPAs, Bob Mims

\_\_\_\_\_ Wednesday, June 18 • 1:00 – 4:30 p.m. • CPE Credit: 4 ..... \$165  
Exploring Ethics, Wil Crawford

\_\_\_\_\_ Thursday, June 19 • 8:30 a.m. – 12:00 p.m. • CPE Credit: 4 ..... \$165  
Unmasking Fraud: A Deeper Dive, Wil Crawford

\_\_\_\_\_ Thursday, June 19 • 1:00 – 4:30 p.m. • CPE Credit: 4 ..... \$165  
Survive and Thrive Against Pressing Hazards and Customer/Employee Issues, Bob Mims.....

\$ \_\_\_\_\_  
SUBTOTAL

**ACTIVITIES Spouses and Guests Welcome! Cash Prizes Will Be Awarded!**

\_\_\_\_\_ Golf Tournament: Friday, June 20 ..... \$85  
Includes green fee, cart fee, tournament registration, and refreshments. Reservation must be received  
by May 31 to guarantee availability. Tee time is offered on a space available basis after cutoff date.  
Player(s) and Handicap(s): \_\_\_\_\_

\_\_\_\_\_ Deep Sea Fishing: Friday, June 20 (Children allowed) ..... \$55  
Includes fishing license, bait, tackle, fish cleaning, and refreshments on board the Destin Princess.  
Advance registration recommended. This trip usually sells out!  
Participant(s): \_\_\_\_\_

\_\_\_\_\_ Pickleball: Friday, June 20 ..... \$40  
Includes registration, paddles, balls, and refreshments.  
Player(s): \_\_\_\_\_

\$ \_\_\_\_\_  
SUBTOTAL

**CHILDREN'S EVENTS Ages 4 to 12 years old • Registrations are required. Only register children attending these free activities.**

\_\_\_\_\_ Thursday Evening: Arts, crafts, games, movie, and snacks ..... FREE  
Number of Children Attending: \_\_\_\_\_

\_\_\_\_\_ Friday Morning: Lawn and pool party with games and snacks ..... FREE  
Number of Children Attending: \_\_\_\_\_

\_\_\_\_\_ Saturday Evening: Carnival with entertainment, arts, crafts, games, movie, and dinner ..... FREE  
Number of Children Attending: \_\_\_\_\_

\$ \_\_\_\_\_  
TOTAL AMOUNT DUE



ONLINE: [www.ms-cpa.org/education/annual-convention](http://www.ms-cpa.org/education/annual-convention)  
FAX: Registration form to 601-856-8255  
CALL: Noma Gillis at 601-856-4244 or 800-772-1099  
MAIL: Registration form with credit card details or check made payable to:  
MSCPA, 306 Southampton Row, Ridgeland, MS 39157

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SIGNATURE \_\_\_\_\_

For planning purposes, registrations or cancellations are encouraged to be made by June 11, 2025. Cancellations/no shows on the date of the event forfeit the entire registration fee. To download a fillable and printable form, visit [www.ms-cpa.org](http://www.ms-cpa.org).



# Legislative **UPDATE**

## New Nonprofit Annual Report Filing Requirement Due by May 15th

Pursuant to House Bill (HB) 1344 from the 2024 Legislative Session and signed by the Governor, effective July 1, 2024, all nonprofit organizations will now be required to file an annual report with the Secretary of State's Office. These reports will be available starting January 1, 2025, and will be due on or before May 15th of each calendar year.

There is no cost associated with this report. Failure to file this report will result in administrative dissolution.

Please note this annual report requirement applies to all nonprofit corporations registered with the Mississippi Secretary of State's Office and is separate from the annual charity registration filing. The annual report filing is in addition to the charity registration filing. Pursuant to MCA § 79-11-503(1), every charitable organization which solicits or intends to solicit contributions by any means whatsoever must register as a charity with the Charities Division. A nonprofit corporation that also solicits contributions within the State of Mississippi will file both reports each year.

For questions or more information, contact the Business Services Division at (601) 359-1633 or email [Customer.Service@sos.ms.gov](mailto:Customer.Service@sos.ms.gov).



## USE YOUR TAX DOLLARS AS A DONATION TO HELP KIDS WHO NEED IT MOST

Redirect your tax dollars to make a meaningful impact! Through Mississippi's Dollar-for-Dollar State Tax Credit for 2025, you can turn your tax payment into a direct donation to Hope Village for Children - helping provide essential care and support for the children who need it most.



SCAN CODE TO  
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Founded in 2000, Hope Village for Children is a nationally recognized, leading residential care facility for kids in Mississippi who are in the custody of Child Protection Services (CPS) at no fault of their own.





# LEARN — VOYAGE —

## Earn Up to 20 CPE Hours on a Cruise

MSCPA, in conjunction with other state societies, is proud to offer a learning experience unlike any other with CPE at Sea. Up to 20 hours of CPE are available.

Discussion Leader: Marc Hamilton

**Saturday, July 26 – Saturday, August 2, 2025 aboard Carnival Mardi Gras**  
Ports of Call: Mahogany Bay, Cozumel, Celebration Key, from Port Canaveral  
A&A Guest Speaker: Jim Martin, CPA

**Saturday, October 11 – Sunday, October 19, 2025 aboard Carnival Horizon**  
Ports of Call: Aruba, Bonaire, Curacao, from Miami  
A&A Guest Speaker: Bruce Nunnally, CPA

**Sunday, May 10– Sunday, May 17, 2026 aboard Carnival Celebration**  
Ports of Call: St. Thomas, Amber Cove, Celebration Key, from Miami  
A&A Guest Speaker: Mike Brand, CPA

### COST

Member: \$950 • Non-Member: \$1,050

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(Cruise cost is subject to change)

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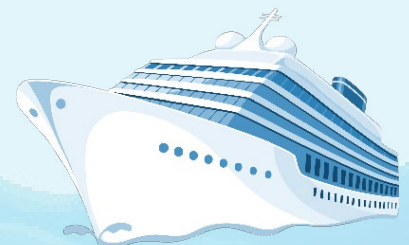
12 Hours of Technology-Focused Education

### SESSION TOPICS

- Cybersecurity and Data Protection for CPAs
- Excel CoPilot Financial Automation
- GPT and Prompt Engineering for CPAs
- Power Automate Accounting Workflows
- PowerBI Dashboards Financial Visualization
- Power Query Data Cleanup



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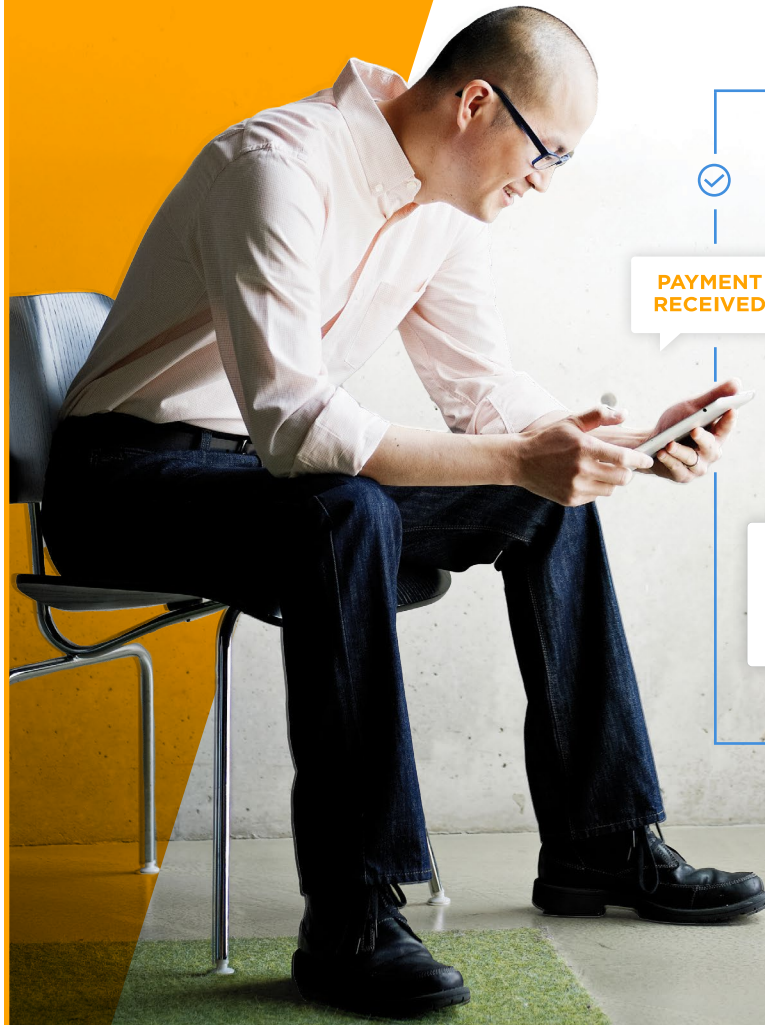
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# Spring Social



## PIZZA, DRINKS & CORNHOLE TOURNAMENT

**Tuesday, 22 April 2025**

**Belhaven Town Center  
6:00pm-8:00pm  
1121 N Jefferson St  
Jackson, MS 39202**

RSVP to Lauren Wray by Noon April 21  
[laurenvherzog@gmail.com](mailto:laurenvherzog@gmail.com)

Mississippi has

# \$8,735,421.77

available as of 2/24/25 to save lives and support families through  
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\*There is a capped limit for allocated funds, so credits are issued on a first-come, first-served basis; applying early helps secure your credit while funds are available. \*This information is not intended to give tax advice. Please consult with your tax professional about your specific tax questions.

**Scan QR to learn more about CPC Metro and the Pregnancy Resource Act tax credit**

Contact Carly:  
[carly@cpcmetro.org](mailto:carly@cpcmetro.org)  
(601) 586-5080

Center for Pregnancy Choices  
Metro Area  
[cpcmetro.org](http://cpcmetro.org)





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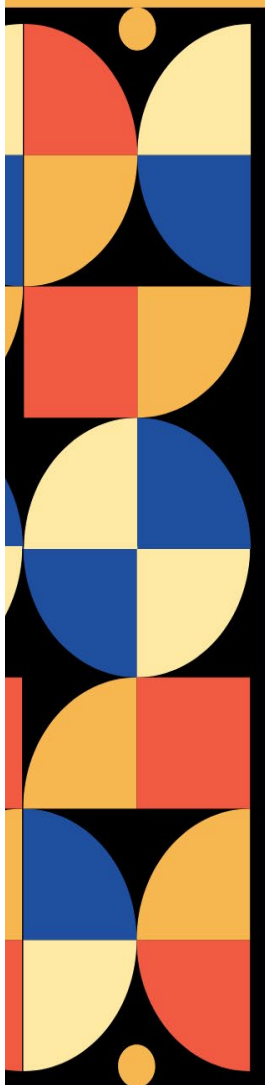
S. Gray Edmondson, J.D., LL.M.<sup>1</sup>  
 Joshua W. Sage, J.D., LL.M.<sup>1,4</sup>  
 Charles J. Allen, J.D., LL.M., CPA<sup>2,3</sup>  
 H. Devin Mills, J.D., LL.M., CPA<sup>2</sup>  
 A. Parker Durham, J.D., LL.M.<sup>2</sup>

<sup>1</sup> Licensed to Practice Law in Mississippi

<sup>2</sup> Licensed to Practice Law in Tennessee

<sup>3</sup> Licensed to Practice Law in Texas

<sup>4</sup> Licensed to Practice in Arkansas



# Volunteer to Join a Committee

Joining a MSCPA committee offers networking opportunities, valuable experience, and connections within your industry. Committee members collaborate to achieve MSCPA objectives. Chair appointments are currently being made by Chairman-Elect Anita Goodrum. Put your name forward or nominate someone by **April 1**.

**VOLUNTEER TODAY!**

[www.ms-cpa.org/membership/committees](http://www.ms-cpa.org/membership/committees)  
 or [kmoody@ms-cpa.org](mailto:kmoody@ms-cpa.org)



# Young CPA Leadership Conference

Wednesday, April 23, 2025

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

**In-Person attendance recommended and encouraged!**

This Mississippi Young CPA Network event is for young and aspiring CPAs looking to build success skills to get ahead.

Credits: 8 • Member Price: \$125

## AGENDA

- 8:00 a.m. **REGISTRATION, BREAKFAST, & NETWORKING**
- 8:30 a.m. **CREATIVITY FOR LEADERS**  
Michael K. Jordan, Belhaven University
- 9:30 a.m. **LEADERSHIP AND LEADING OTHERS**  
Charles Haynes, Director of the Mississippi Highway Patrol and Assistant Commissioner of the Mississippi Department of Public Safety.
- 10:30 a.m. **BREAK**
- 10:40 a.m. **EFFECTIVE COMMUNICATION FOR PERSONAL AND PROFESSIONAL SUCCESS**  
Ralph W. Reed, First Resource Capital
- 12:00 p.m. **LUNCH**
- Annual Business Meeting
  - Rising Star Award
  - Sponsor Appreciation
- 1:00 p.m. **FRAUD, LIES, AND HERMES TIES**  
AARON BEAM
- 3:30 p.m. **THE RIPPLE EFFECT: DISCOVERING THE POWER OF YOUR INFLUENCE**  
Kimberly M. Williams, Medical Management Services
- 4:30 p.m. **DOOR PRIZES & ADJOURNMENT**

**REGISTER  
TODAY!**  
MS-CPA.ORG

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# CHAPTERS

## SOUTHEAST

The Southeast Chapter had a tremendous turnout for their lunch meeting on February 20th held at Cooperative Energy’s Training Center located in Hattiesburg. President **Jabe Mills** welcomed members and presided over the business meeting, and Vice-President **Jay Babbington** presented the financial report. The order of business for the day included the election of new officers.

Keynote speakers **Blaise M. Sonnier**, Director of the School of Accountancy at the University of Southern Mississippi, and MSCPAs President/CEO **Karen Moody** discussed Licensing Model Updates and Legislation. At the conclusion of the presentation there were door prizes, and Karen recognized Jabe and Jay for their years of dedicated service to the Chapter and presented them with gifts.



**Congratulations to the newly elected officers top left:**

- President: Blaise Sonnier
- Vice-President: Frank Smith
- Secretary/Treasurer: Destiny Chafin



# CENTRAL



# 2025 LUNCH & LEARN

## Speakers :



**Shad White**  
State Auditor



**David McRae**  
State Treasurer

April 29, 2025



11:30 a.m. - 2:00 p.m.



306 Southampton Row  
Ridgeland, MS 39157



More Information : 601-856-4244

## Officer Elections/ Volunteer Now



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





## AICPA and NASBA Announce Proposed Changes to the Uniform Accountancy Act

### Alternate Pathway to Licensure

In the previous MSCPA Newsletter issue we discussed current activity regarding an alternate pathway to licensure. In a turn of events on March 3, the American Institute of CPAs (AICPA) and National Association of State Boards of Accountancy (NASBA) proposed new changes to the profession's model law. The Uniform Accountancy Act (UAA) provides state legislatures and boards of accountancy with a national model that can be adopted in full or partially adapted to meet the needs of each jurisdiction.

The proposed UAA changes would:

- Enable states to adopt a third licensure pathway (earn a bachelor's degree, complete two years of professional experience, and pass the CPA Examination)
- Shift to an "individual-based" mobility model, which allows CPAs to practice in other states with just one license
- Add safe harbor language to ensure CPAs who meet existing licensure requirements preserve practice privileges

These updates reflect feedback gathered during the 2024 exposure draft period, as well as forward-looking solutions led by state CPA societies and licensing boards.

Comments are due May 3, 2025, and can be submitted through [this form or by scanning the QR code](#). Members are encouraged to participate.

Download the 2025 UAA Exposure Draft [here](#) or visit the MSCPA website homepage.

*AICPA contributed to this article.*



## Morgan Stanley



L-R: **Taylor Davis**, Client Service Associate; **Jennifer Walley**, Financial Advisor; **Preston Dowell**, Financial Advisor; **Melanie Dowell CRPS®**, Financial Advisor; **Walker Dowell**, Financial Advisor; **Sandi Peebles**, Client Service Associate; **Brandi Carr**, Wealth Management Associate

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\* As of June 30, 2023. Includes \$293 million not in custody at Morgan Stanley.

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CRC 6047712 10/23 CS 895245-3868290 11/23

# BOI Reporting Update

*As of Press Time*

On February 17, the Beneficial Ownership Information (BOI) filing injunction was lifted. FinCEN responded by stating that BOI reporting requirements are back in effect, with a new deadline of March 21, 2025, for most companies.

However, FinCEN and Treasury later announced that they will not issue any fines or penalties or take any other enforcement actions against any companies based on any failure to file or update beneficial ownership information reports pursuant to the Corporate Transparency Act by the current deadlines. No fines or penalties will be issued, and no enforcement actions will be taken, until a forthcoming interim final rule becomes effective and the new relevant due dates in the interim final rule have passed. This announcement continues Treasury's commitment to reducing regulatory burden on businesses, as well as prioritizing under the Corporate Transparency Act reporting of BOI for those entities that pose the most significant law enforcement and national security risks.

**No later than March 21, 2025**, FinCEN intends to issue an interim final rule that extends BOI reporting deadlines, recognizing the need to provide new guidance and clarity as quickly as possible, while ensuring that BOI that is highly useful to important national security, intelligence, and law enforcement activities is reported.

FinCEN also intends to solicit public comment on potential revisions to existing BOI reporting requirements. FinCEN will consider those comments as part of a notice of proposed rulemaking anticipated to be issued later this year to minimize burden on small businesses while ensuring that BOI is highly useful to important national security, intelligence, and law enforcement activities, as well to determine what, if any, modifications to the deadlines referenced here should be considered.

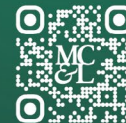
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Than Later?**



MATTHEWS  
CUTRER *and*  
LINDSAY, P.A.

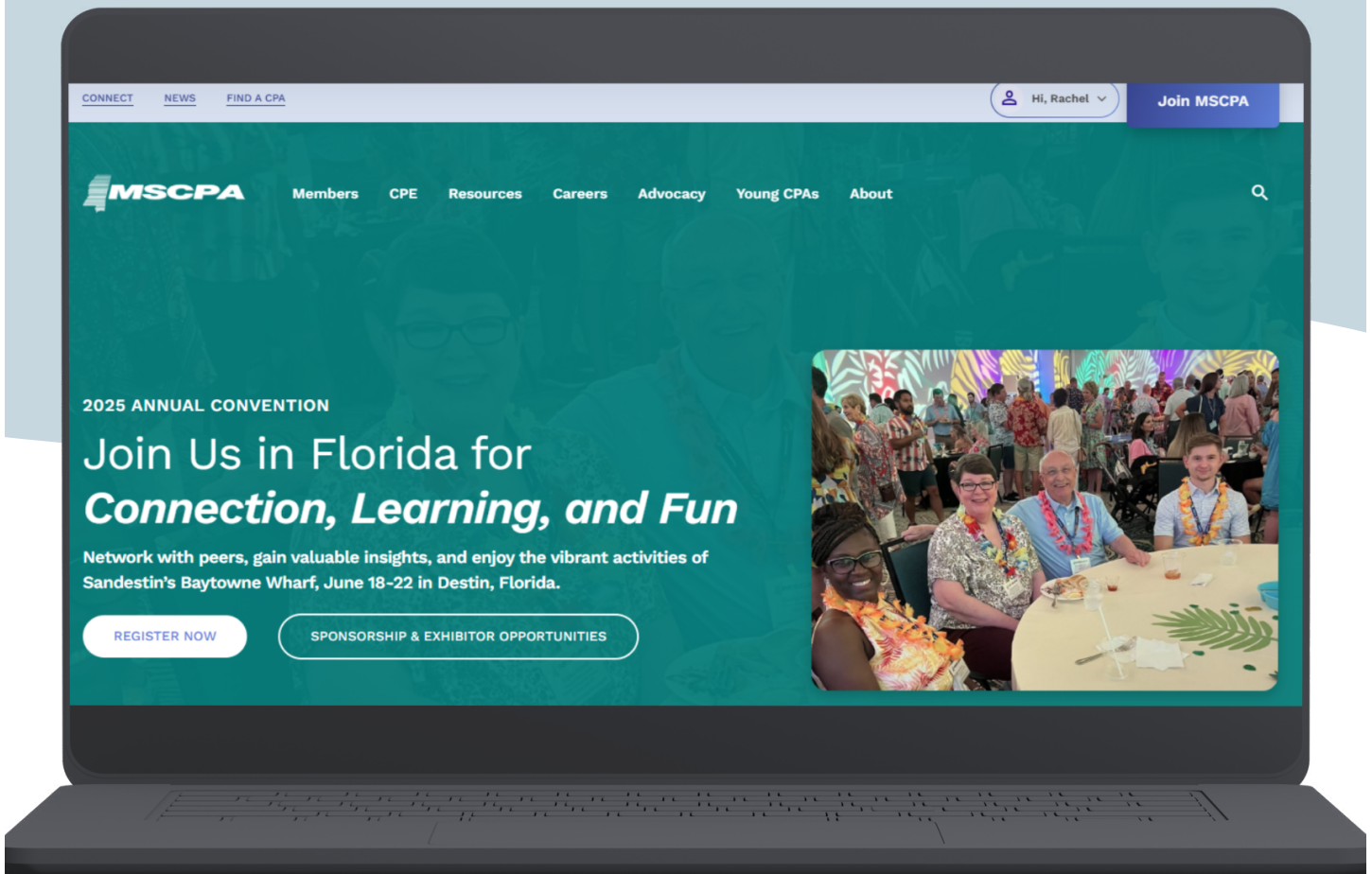
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# IMPORTANT NEWS THIS YEAR

Out with the old and in with the new! We are excited to announce that we are moving to an all-inclusive platform designed for CPA societies that completely integrates our NEW website, member database, community forum, marketing and communications, and CPE livestreaming. The best news for our members may be that polling questions will now be prompted by sound! The platform will include the bells and whistles you are accustomed to plus MORE. The registration process will be easier to distinguish between in-person and livestreaming courses at a glance and once registered you will no longer receive subsequent emails marketing that same course. This platform will allow for more versatility in the future to enhance your member experience.





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# MSCPA Upcoming Conferences

*Register to Attend MSCPA Conferences Happening in May!*

## Mississippi Technology Conference

May 13-14, 2025 • 8:30 a.m. – 4:30 p.m.

Livestream Only

This conference offers 16 hours of dynamic presentations aimed at boosting your tech productivity.

Renowned speakers from K2 Enterprises tackle real-world challenges in accounting, finance, and business, delivering practical solutions, advanced techniques, and essential skills to keep you ahead in the fast-evolving tech landscape.

Topics Include:

- **Tech Update • Microsoft Teams • Microsoft 365 • CPA Firm Update • Automation • Excel • Data Security**
- **CRM • Client Accounting Services for CPA Firms • AI • Quickbooks • Home Networking • Power BI**
- **PDF Tips • Tech Crimes**

## Business & Industry Management Development Conference

May 20-21, 2025 • 8:30 a.m. – 4:30 p.m.

In-person at the MSCPA in Ridgeland or Livestream

This conference is geared toward chief financial officers, controllers and other executives in industry, managers, and partners in public accounting.

Topics Include:

- **Getting Audit Ready • Human Resources • Marketing • Ever Changing Account and Strategic Demands**
- **Communicating in Today's Office • Internal Investigations • AI**

## Accounting and Auditing Conference

May 22, 2025 • 8:30 a.m. – 4:30 p.m.

In-person at the MSCPA in Ridgeland or Livestream

This event will provide the crucial guidance you need to stay in compliance with the many A&A rules affecting your practice, business or clients.

Topics Include:

- **Making Financial Statements Come Alive • Accounting Automations and Data Analytics • Accounting is More Than Debits and Credits**

**Register TODAY: [www.ms-cpa.org](http://www.ms-cpa.org)**

# 2025 CPE at A Glance

DATE	DAY	NEW	COURSE TITLE	TIME	MEM	NON MEM	CPE HRS	CATEGORY
Jan 23	Th		Ethics and Professional Conduct for CPAs	8:30 - 12:00	165	205	4	Ethics/Rules
Jan 23	Th		MS Rules & Regulations	1:00 - 1:50	40	60	1	MS Rules
Mar 04	T		<i>Livestream Only</i> : The Needed Focus on Cyber-Security	12:00 - 1:40	80	120	2	A&A
Mar 11	T		<i>Livestream Only</i> : Steps to Stop External Fraud	12:00 - 1:40	80	120	2	A&A
Mar 18	T	New	<i>Livestream Only</i> : How AI Fits into the Accounting World	12:00 - 1:40	80	120	2	A&A
Mar 25	T	New	<i>Livestream Only</i> : What's New in Excel®	12:00 - 1:40	80	120	2	A&A
Apr 17	Th	New	<i>Livestream Only</i> : CPA Mock Exam	12:00 - 4:00	0	0	0	
<b>Apr 23</b>	<b>W</b>		<b>Young CPA Leadership Conference</b>	<b>8:30 - 4:30</b>	<b>150</b>	<b>150</b>	<b>8</b>	<b>A&amp;A/PerDev</b>
Apr 30	W	New	<i>Livestream Only</i> : CPA's CAN Go to Jail for Ethical Lapses	12:00 - 1:40	80	120	2	Ethics
May 02	F		MS Rules and Regulations	1:00 - 1:50	40	60	1	MS Rules
May 07	W		<i>Livestream Only</i> : Hot Topics: Management of Accounting Practice/Firm Administration	11:00 - 12:00	40	40	1	Gen
<b>May 08</b>	<b>Th</b>		<b>Committee Day</b>					
May 12	M		MS Sales and Use Tax	8:30 - 12:00	165	205	4	Tax
May 12	M		Ethics and Professional Conduct	1:00 - 4:30	165	205	4	Ethics/Rules
<b>May 13-14</b>	<b>T-W</b>		<b><i>Livestream Only</i>: MS Technology Conference</b>	<b>8:30 - 4:30</b>	<b>500</b>	<b>620</b>	<b>16</b>	<b>Gen</b>
May 15	Th		Advanced Audits of 401(k) Plans: Best Practices and Current Developments	8:30 - 4:30	290	360	8	A&A
May 16	F	New	CFO Fundamentals: Assessing Risk, Navigating Change, and Other Duties as Assigned	8:30 - 4:30	290	360	8	A&A
May 19	M		Construction Contractors: Critical Accounting, Auditing, and Tax Issues	8:30 - 4:30	290	360	8	A&A/Tax
<b>May 20-21</b>	<b>T-W</b>		<b>Business and Industry: Management Development Conference</b>	<b>8:30 - 4:30</b>	<b>355</b>	<b>475</b>	<b>16</b>	<b>Gen</b>
<b>May 22</b>	<b>Th</b>		<b>Accounting and Auditing Conference</b>	<b>8:30 - 4:30</b>	<b>225</b>	<b>300</b>	<b>8</b>	<b>A&amp;A</b>
May 23	F		Employer's Handbook: Legal, Tax, and Health Care Issues	8:30 - 4:30	290	360	8	Gen/Tax
May 27	T		The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent	8:30 - 4:30	290	360	8	Tax
May 28	W		Hot IRS Tax Examination Issues for Individuals and Businesses	8:30 - 4:30	290	360	8	Tax
May 29	Th	New	Enterprise Risk Management	8:30 - 4:30	290	360	8	A&A
May 30	F	New	Financial Forensics	8:30 - 4:30	290	360	8	A&A
Jun 02	M		Business Law Essentials for Practitioners and Controllers (Virtual Speaker)	8:30 - 4:30	290	360	8	Gen
Jun 03	T		Estate and Life Planning Issues for the Middle-Income Client	8:30 - 4:30	290	360	8	Tax
Jun 04	W	New	Surgent's Individual and Financial-Planning Tax Camp	8:30 - 4:30	290	360	8	Tax
Jun 05	Th		Succession Planning for the Small Business Owner: Finding the Exit Ramp	8:30 - 12:00	165	205	4	Tax
Jun 05	Th		Taxation of Partnership Distributions and Sales of Partnership Interests	1:00 - 4:30	165	205	4	Tax
Jun 06	F		Preparing Not-for-Profit Financial Statements	8:30 - 4:30	290	360	8	A&A
Jun 09	M		Evaluating Fraud Risk in a Financial Statement Audit (Virtual Speaker)	8:30 - 12:00	165	205	4	A&A
Jun 09	M		Annual FASB Update and Review (Virtual Speaker)	1:00 - 4:30	165	205	4	A&A
Jun 10	T		Integrated Planning, Forecasting, and Budgeting for Organizational Success (Virtual Speaker)	8:30 - 12:00	165	205	4	A&A
Jun 10	T		Controller/CFO Update: Hot Topics Facing Today's Financial Professional (Virtual Speaker)	1:00 - 4:30	165	205	4	Gen
Jun 11	W	New	A Brief History of the Universe: But Mostly Business Entity Tax Treatment	8:30 - 12:00	165	205	4	Tax
Jun 11	W	New	Fiduciary Tax: What You Didn't Know You Need to Know	1:00 - 4:30	165	205	4	Tax
Jun 12	Th	New	Mississippi Board Rules & Regulations	8:30 - 12:00	165	205	4	Ethics/Rules
Jun 12	Th	New	Leading with Internal Controls	1:00 - 4:30	165	205	4	A&A
Jun 13	F		Surgent's Individual Income Tax Update	8:30 - 12:00	165	205	4	Tax
Jun 13	F		Key Partnership and S Corporation Tax Planning Strategies	1:00 - 4:30	165	205	4	Tax
Jun 16	M		Securing a Comfortable Retirement in the Age of Spending	8:30 - 4:30	290	360	8	Gen/Tax
Jun 17	T		Social Security and Medicare: Planning for You and Your Clients	8:30 - 4:30	290	360	8	Tax
Jun 18	W		<i>Livestream Only</i> : Implementing and Maintaining an Internal Control System	8:30 - 4:30	290	360	8	A&A
Jun 19	Th		<i>Livestream Only</i> : Advanced Excel® Topics for Spreadsheet Power Users	8:30 - 4:30	290	360	8	Gen
Jun 20	F		<i>Livestream Only</i> : Making Excel Formulas Work for You	8:30 - 12:00	165	205	4	Gen
Jun 20	F	New	<i>Livestream Only</i> : How AI is Automating Internal Control	1:00 - 4:30	165	205	4	Gen
Jun 23	M	New	Communicating to Colleagues - Making the Numbers Make Sense	8:30 - 4:30	290	360	8	Gen
Jun 24	T	New	Common Sense Solutions for Accounting, Strategy, and the Evolving Role of the CFO	8:30 - 4:30	290	360	8	A&A/Gen
Jun 25	W		How to Settle a Client's Estate (Virtual Speaker)	8:30 - 4:30	290	360	8	Tax
Jun 26	Th	New	Performing Preparation, Compilation, and Review Engagements	8:30 - 4:30	290	360	8	A&A
Jun 27	F		Ethics and Professional Conduct	8:30 - 12:00	165	205	4	Ethics/Rules
Jun 27	F		Fraud: Sign, Sign, Everywhere a Sign	1:00 - 4:30	165	205	4	A&A



## 2025 CPE at A Glance *continued*

DATE	DAY	NEW	COURSE TITLE	TIME	MEM	NON MEM	CPE HRS	CATEGORY
Jun 30	M	New	Transforming Accounting with AI: Practical Insights and Applications	8:30 - 4:30	290	360	8	Gen
Jul 09	W	New	<i>Livestream Only:</i> Power BI Dashboards: Real Time Financial Visualizations	8:30 - 10:10	90	140	2	Gen
Jul 09	W	New	<i>Livestream Only:</i> Advanced Power BI Techniques for CPA Dashboards	10:20 - 12:00	90	140	2	Gen
Jul 09	W	New	<i>Livestream Only:</i> Document Automation for Financial Professionals	1:00 - 2:40	90	140	2	Gen
Jul 09	W	New	<i>Livestream Only:</i> Budgeting and Variance Analysis with AI	2:50 - 4:30	90	140	2	Gen
Jul 15	T	New	<i>Livestream Only:</i> K2's Microsoft 365/Office 365 - All the things You Need to Know	9:00 - 4:30	295	365	8	Gen
Jul 16	W	New	<i>Livestream Only:</i> 2025 Federal and State Income Tax Update for the Local Practitioner	12:00 - 1:40	80	120	2	Tax
Jul 16	W	New	<i>Livestream Only:</i> K2's Small Business Internal Controls, Security, and Fraud Prevention and Detection	9:00 - 4:30	295	365	8	A&A
Jul 17	Th	New	<i>Livestream Only:</i> K2's Excel Charting And Visualizations	9:00 - 12:00	170	210	4	Gen
Jul 17	Th	New	<i>Livestream Only:</i> K2's Best Word, Outlook, And PowerPoint Features	1:00 - 4:30	170	210	4	Gen
Jul 26-Aug 2	Sa-Sa	New	Learn Voyage: CPE at Sea		950	1050	20	A&A/Gen
Jul 29	T	New	<i>Livestream Only:</i> K2's Microsoft Teams	9:00 - 12:00	170	210	4	Gen
Jul 29	T	New	<i>Livestream Only:</i> Artificial Intelligence For Accounting And Financial Professionals	1:00 - 4:30	170	210	4	Gen
Jul 30	W	New	<i>Livestream Only:</i> K2's Advanced QuickBooks Tips And Techniques	9:00 - 12:00	170	210	4	Gen
Jul 30	W	New	<i>Livestream Only:</i> K2's Case Studies In Fraud And Technology Controls	1:00 - 4:30	170	210	4	Gen
Aug 06	W		<i>Livestream Only:</i> Hot Topics: Management of Accounting Practice/Firm Administration	11:00 - 12:00	40	40	1	Gen
<b>Aug 19</b>	<b>T</b>		<b>Agriculture and Farm Activities Conference</b>	<b>8:30 - 4:30</b>	<b>225</b>	<b>300</b>	<b>8</b>	<b>Gen</b>
Aug 20	W	New	<i>Livestream Only:</i> 2025 Compilation, Preparation and Review Update	12:00 - 1:40	80	120	2	A&A
<b>Aug 21</b>	<b>Th</b>		<b>Banking and Finance Conference</b>	<b>8:30 - 4:30</b>	<b>225</b>	<b>300</b>	<b>8</b>	<b>Gen</b>
Aug 26	T		Form 990 Update	8:30 - 4:30	290	360	8	Tax
<b>Sep 11-12</b>	<b>Th-F</b>		<b>Governmental Accounting and Auditing Conference</b>	<b>8:30 - 4:30</b>	<b>305</b>	<b>425</b>	<b>16</b>	<b>A&amp;A</b>
Sep 16	T	New	<i>Livestream Only:</i> Cybersecurity and Data Protection for CPAs	8:30 - 10:10	90	140	2	Gen
Sep 16	T	New	<i>Livestream Only:</i> Mastering Microsoft 365 for CPA Efficiency	10:20 - 12:00	90	140	2	Gen
Sep 16	T	New	<i>Livestream Only:</i> Practical Applications for AI in CPA Workflows	1:00 - 2:40	90	140	2	Gen
Sep 16	T	New	<i>Livestream Only:</i> Internal Controls for Small Organizations	2:50 - 4:30	90	140	2	A&A
<b>Sep 18</b>	<b>Th</b>		<b>Health Care Services Conference</b>	<b>8:30 - 4:30</b>	<b>215</b>	<b>215</b>	<b>8</b>	<b>Gen</b>
Sep 19	F	New	<i>Livestream Only:</i> CPA Mock Exam	12:00 - 4:00	0	0	0	
Sep 23	T	New	Ethics and Professional Conduct	8:30 - 12:00	165	205	4	Ethics/Rules
Sep 23	T	New	Hackers, Hoodlums, and Hot Shots	1:00 - 4:30	165	205	4	A&A
<b>Sep 25</b>	<b>Th</b>		<b>Not-for-Profit Conference</b>	<b>8:30 - 4:30</b>	<b>125</b>	<b>125</b>	<b>8</b>	<b>Gen</b>
Oct 11-19	Sa-Su	New	Learn Voyage: CPE at Sea		950	1050	20	A&A/Gen
<b>Oct 22</b>	<b>W</b>		<b>Industry Conference</b>	<b>8:30 - 4:30</b>	<b>225</b>	<b>300</b>	<b>8</b>	<b>Gen</b>
Oct 27	M		Individual Tax Fundamentals	8:30 - 4:30	290	360	8	Tax
Oct 28	T		Intermediate Individual Taxation	8:30 - 4:30	290	360	8	Tax
Oct 29	W		S Corporations: Key Issues, Compliance, and Tax Strategies	8:30 - 4:30	290	360	8	Tax
Nov 05	W		<i>Livestream Only:</i> Hot Topics: Management of Accounting Practice/Firm Administration	11:00 - 12:00	40	40	1	Gen
<b>Nov 07</b>	<b>F</b>	New	<b><i>Livestream Only:</i> K2's Artificial Intelligence Conference</b>	<b>8:30 - 4:00</b>	<b>295</b>	<b>370</b>	<b>8</b>	<b>Gen</b>
<b>Nov 07</b>	<b>F</b>		<b>Accounting Education Conference</b>	<b>8:30 - 4:30</b>	<b>100</b>	<b>100</b>	<b>8</b>	<b>Gen</b>
Nov 10	M		Tax Fundamentals LLCs and Partnerships	8:30 - 4:30	290	360	8	Tax
Nov 11	T		Surgent's Top 10 Tax Topics This Year	8:30 - 4:30	290	360	8	Tax
Nov 12	W	New	<i>Livestream Only:</i> 50 Reasons to Fire a Client	12:00 - 1:40	80	120	2	Gen
Nov 13	Th	New	<i>Livestream Only:</i> CPA Mock Exam	11:00 - 3:00	0	0	0	
<b>Nov 20</b>	<b>Th</b>		<b>Business Valuation and Litigation Services Conference</b>	<b>8:30 - 4:30</b>	<b>225</b>	<b>300</b>	<b>8</b>	<b>Gen</b>
<b>Dec 03</b>	<b>W</b>	New	<b><i>Livestream Only:</i> K2's Excel Conference</b>	<b>8:30 - 4:30</b>	<b>295</b>	<b>370</b>	<b>8</b>	<b>Gen</b>
<b>Dec 8-9</b>	<b>M-T</b>		<b>Mississippi Tax Institute</b>	<b>8:30 - 4:30</b>	<b>450</b>	<b>570</b>	<b>16</b>	<b>Tax</b>
Dec 10	W	New	<i>Livestream Only:</i> 2025 Federal and State Income Tax Update for the Local Practitioner	12:00 - 1:40	80	120	2	Tax
Dec 12	F	New	Ethics, Rules, and Regulations	8:30 - 12:00	165	205	4	Ethics/Rules
Dec 12	F		Reviewing Individual Tax Returns	1:00 - 4:30	165	205	4	Tax
Dec 16	T		AICPA's Annual Federal Tax Update	8:30 - 4:30	290	360	8	Tax
Dec 19	F		Reviewing Partnership Tax Returns	8:30 - 12:00	165	205	4	Tax
Dec 19	F		Reviewing S Corporation Tax Returns: What are you Missing?	1:00 - 4:30	165	205	4	Tax
May 2026	Su-Su	New	Learn Voyage: CPE at Sea		950	1050	20	A&A/Gen



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Upper Cumberland, TN CPA grossing \$445K \*New\*  
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