



2025

CPE

Catalog

MISSISSIPPI SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS

306 Southampton Row | Ridgeland, MS 39157 | 601-856-4244 | www.ms-cpa.org

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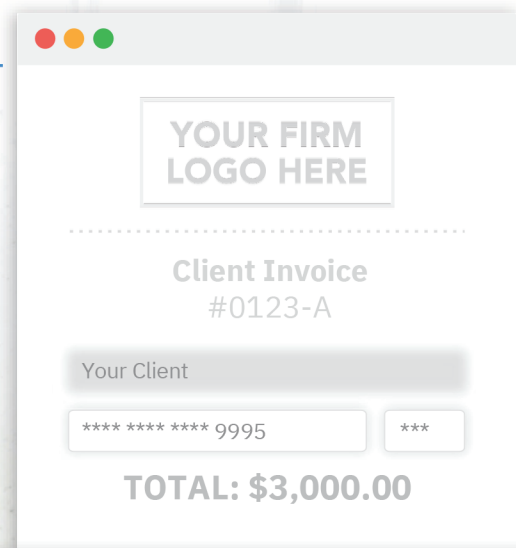
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YOUR TRUSTED LEARNING PARTNER

Whatever your learning needs, the MSCPA has got you covered. There are many changes affecting you such as evolving technologies, new regulations and competitive pressures. These changes bring opportunities for new competencies and specializations. Your partnership with us means priority access to changing regulations and new trends, hundreds of learning products to help you stay sharp, and effective learning outcomes to help you succeed.

MSCPA is dedicated to offering the highest quality, highest value continuing education programs to our members. Your support is critical to our success and we truly can't do it without your support. Start planning your CPE today – and thank you for choosing the MSCPA as your provider of continuing education!

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.

All MSCPA courses and conferences will be offered with in-person and live stream options, unless noted as livestream only. We encourage members to participate in-person for learning, networking, snacks, meals, and hospitality. Some speakers will present virtually as will be noted when registering for an in-person course. Attendees will be able to view the speaker and slides on the projector screen and are encouraged to bring their laptop or iPad to participate in the chat box with the speaker and those viewing online

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The full CPE catalog is available
online at 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	
Apr 23	W		Young CPA Leadership Conference	8:30 - 4:30	150	150	8	A&A/PerDev
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
May 08	Th		Committee Day					
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
May 13-14	T-W		<i>Livestream Only</i>: MS Technology Conference	8:30 - 4:30	500	620	16	Gen
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
May 20-21	T-W		Business and Industry: Management Development Conference	8:30 - 4:30	355	475	16	Gen
May 22	Th		Accounting and Auditing Conference	8:30 - 4:30	225	300	8	A&A
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
Aug 19	T		Agriculture and Farm Activities Conference	8:30 - 4:30	225	300	8	Gen
Aug 20	W	New	<i>Livestream Only:</i> 2025 Compilation, Preparation and Review Update	12:00 - 1:40	80	120	2	A&A
Aug 21	Th		Banking and Finance Conference	8:30 - 4:30	225	300	8	Gen
Aug 26	T		Form 990 Update	8:30 - 4:30	290	360	8	Tax
Sep 11-12	Th-F		Governmental Accounting and Auditing Conference	8:30 - 4:30	305	425	16	A&A
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
Sep 18	Th		Health Care Services Conference	8:30 - 4:30	215	215	8	Gen
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
Sep 25	Th		Not-for-Profit Conference	8:30 - 4:30	125	125	8	Gen
Oct 11-19	Sa-Su	New	Learn Voyage: CPE at Sea		950	1050	20	A&A/Gen
Oct 22	W		Industry Conference	8:30 - 4:30	225	300	8	Gen
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
Nov 07	F	New	<i>Livestream Only:</i> K2's Artificial Intelligence Conference	8:30 - 4:00	295	370	8	Gen
Nov 07	F		Accounting Education Conference	8:30 - 4:30	100	100	8	Gen
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	
Nov 20	Th		Business Valuation and Litigation Services Conference	8:30 - 4:30	225	300	8	Gen
Dec 03	W	New	<i>Livestream Only:</i> K2's Excel Conference	8:30 - 4:30	295	370	8	Gen
Dec 8-9	M-T		Mississippi Tax Institute	8:30 - 4:30	450	570	16	Tax
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



2025 Conference Dates & Sponsorship Opportunities

Young CPA Leadership Conference

April 23 (Wednesday)

Gold \$600 | Silver \$400 | Bronze \$300

Mississippi Technology Conference

May 13-14 (Tuesday-Wednesday)

Livestream Only

Business & Industry Management Development Conference

May 20-21 (Tuesday-Wednesday)

Gold \$600 | Silver \$400 | Bronze \$300

Accounting & Auditing Conference

May 22 (Thursday)

Gold \$600 | Silver \$400 | Bronze \$300

Agricultural & Farm Activities Conference

August 19 (Tuesday)

Gold \$600 | Silver \$400 | Bronze \$300

Banking & Finance Conference

August 21 (Thursday)

Gold \$1,000 | Silver \$500 | Bronze \$300

Governmental Accounting and Auditing Conference

September 11-12 (Thursday-Friday)

Gold \$1,000 | Silver \$500 | Bronze \$300

Health Care Services Conference

September 18 (Thursday)

Gold \$600 | Silver \$400 | Bronze \$300

Not-For-Profit Conference

September 25 (Thursday)

Gold \$1,000 | Silver \$500 | Bronze \$300

Industry Conference

October 22 (Wednesday)

Gold \$600 | Silver \$400 | Bronze \$300

Accounting Education Conference

November 7 (Friday)

Gold \$600 | Silver \$400 | Bronze \$300

K2's Artificial Intelligence Conference

November 7 (Friday)

Livestream Only

Business Valuation & Litigation Conference

November 20 (Thursday)

Gold \$600 | Silver \$400 | Bronze \$300

K2's Excel Conference

December 3 (Wednesday)

Livestream Only

Mississippi Tax Institute

December 8-9 (Monday-Tuesday)

Premier \$1,500 | Gold \$1,000

Silver \$600 | Bronze \$400

Exhibitor Only \$350

Sheraton - Flowood, MS

2025 ANNUAL CONVENTION

WEDNESDAY, JUNE 18 - SUNDAY, JUNE 22

SANDESTIN GOLF AND BEACH RESORT

DESTIN, FLORIDA

Make plans now to attend our 2025 Annual Convention! The Officers and Board of Governors welcome members, their families, and guests and invite you to enjoy a program planned with entertainment for everyone.

Receive up to 16 CPE Hours on Wednesday & Thursday!

Current Challenges and Crucial Skills for CPAs

Wednesday, June 18

8:30am – 12:00pm

Instructor: Bob Mims

Member Price: \$165

Exploring Ethics, Laws, Rules and Regulations

Wednesday, June 18

1:00pm – 4:30pm

Instructor: Wil Crawford

Member Price: \$165

Unmasking Fraud: A Deeper Dive

Thursday, June 19

8:30am – 12:00pm

Instructor: Wil Crawford

Member Price: \$165

Survive and Thrive Against Pressing Hazards and Customer/Employee Issues

Thursday, June 19

1:00pm – 4:30pm

Instructor: Bob Mims

Member Price: \$165

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

Current Triennial Year Ends

June 30, 2025

UPCOMING ETHICS COURSES

The Mississippi State Board of Public Accountancy requires that each CPA must have obtained and report online a minimum four CPE credit hours in Board approved Ethics, Professional Conduct, Public Accountancy Law and Regulations courses triennially. A minimum of one of these Ethics CPE credit hours must be in the subject of Mississippi Public Accountancy Rules.

MSCPA can help you meet the requirement!

4 Hour Classes Include:

3 Hours Ethics and 1 Hour MS Rules

Member Price: \$165

Non-Member Price: \$205

January 23, 2025

Donna Ingram
MSCPA - Ridgeland, MS

May 12, 2025

Donna Ingram
MSCPA - Ridgeland, MS

June 12, 2025

Billy Morehead
MSCPA - Ridgeland, MS

June 18, 2025

Wil Crawford
Sandestin - Destin, FL

June 27, 2025

Donna Ingram
MSCPA - Ridgeland, MS

September 23, 2025

Donna Ingram
MSCPA - Ridgeland, MS

December 12, 2025

Bill Taylor
MSCPA - Ridgeland, MS

1 Hour MS Rules and Regulations

Member Price: \$40

Non-Member Price: \$60

January 23, 2025

Donna Ingram
MSCPA - Ridgeland, MS

May 2, 2025

Donna Ingram
MSCPA - Ridgeland, MS



*Ethics courses at MSCPA will also be available via **Livestream**.*

Lunch & Learn

Limited time? Require CPE credits?

Explore MSCPA's concise 1-2 hour **Lunch & Learn** livestreaming sessions!

TECH TUESDAY IN MARCH

Tech Tuesday is a livestream series designed to provide you with the technical knowledge you need. Each lunch and learn from 12:00-1:40 p.m. will examine a specific tech topic. Popular instructor Karl Egnatoff, CPA will lead the series.

March 4 - The Needed Focus on Cyber Security

March 11 - Steps to Stop External Fraud

March 18 - How AI Fits Into the Accounting World

March 25 - What's New in Excel®

Member Cost: \$80 • Non-Member Cost: \$120 • CPE Credit: 2

JIM MARTIN'S SERIES: CPE THAT YOU CAN USE

12:00-1:40 p.m.

April 30 - CPA's CAN Go to Jail for Ethical Lapses

July 16 - 2025 Federal and State Income Tax Update for the Local Practitioner

August 20 - 2025 Compilation, Preparation and Review Update

November 12 - 50 Reasons to Fire a Client

December 10 - 2025 Federal and State Income Tax Update for the Local Practitioner

Member Cost: \$80 • Non-Member Cost: \$120 • CPE Credit: 2

HOT TOPICS: MANAGEMENT OF ACCOUNTING PRACTICE/FIRM ADMINISTRATION

Join other managing partners, firm leaders, and firm administrators for these interactive quarterly sessions from 11:00 a.m. – 12:00 p.m. to discuss hot topics in managing your accounting practice. These unique interactive sessions will provide attendees the chance to pose questions on camera and engage in open dialogues with guest speakers and peers.

May 7 • August 6 • November 5

Member Cost: \$40 • Non-Member Cost: \$40 • CPE Credit: 1

Please submit your suggestions on the topics you'd like to hear to MSCPA.

Online Partner Courses

& Self Study Partner Courses

The MSCPA offers courses from our partners with quick and easy registration through ms-cpa.org.

We have partnered with the best providers in the country at a reduced cost for our members.

To register for a webinar course, please visit our online catalog at www.ms-cpa.org/cpe/catalog/events.



Onsite Learning Where you Work

Support the MSCPA & Let us HELP YOU!

Take advantage of MSCPA's knowledge and relationship with high quality instructors.

Whether your staff needs to simply maintain their licenses, such as meeting the state's ethics requirements, or would like to delve into the recent changes to professional accounting and auditing standards, the MSCPA has your team covered.

- *Ideal for 10+ staff members*
- *Customizable for your needs: half days, one day or several days*
- *Hundreds of topics*
- *No lost travel time or expenses for staff*
- *Confidential learning environment specific to your firm's needs*

Bring high-quality courses, backed by the resources and experience of the MSCPA, direct to your office.

Schedule a Conversation to Learn More

Contact Information

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Mississippi Society of CPAs
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CPE Special

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

Guest A&A Speaker: Jim Martin, CPA

Saturday, October 11 – Sunday, October 19, 2025 aboard Carnival Horizon

Ports of Call: Aruba, Bonaire, Curacao, from Miami

Guest A&A 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

Guest A&A Speaker: Mike Brand, CPA

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 during these cruises aboard Carnival departing from Port Canaveral, Florida and Miami, Florida.

COST

Member: \$950 • Non-Member: \$1,050

For Cabin Pricing Visit: <https://learnvoyage.com/>

(Cruise cost is subject to change)

CPE Credits Available

8 Hours of A&A Content

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



For complete details, visit: www.learnvoyage.com



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| Life Insurance | Workers Compensation |
| Homeowners | Business Office Package |
| Personal Auto & Flood | Cyber Liability |



ASSOCIATION SERVICES
PROFESSIONALS

CALL 985-674-3880 OR VISIT BBGULFSTATES.COM/ASP

Course Information

All courses listed are offered in-person and via livestream except as noted.

MATERIALS

Upon course registration, in-person registrants are asked if they prefer to have a printed manual in addition to the e-materials. Links to the e-materials will be listed with your course registrations in your account on the MSCPA website seven calendar days before the course. You will receive an e-mail when the materials are available. If you request printed materials upon registration, it will be available for pick up at the registration desk on the date of the class. **Printed materials are not available for conferences.**

1/23/2025
Thursday
Ridgeland
MSCPA

Ethics and Professional Conduct

Discussion Leader: Donna Ingram

Cost: Members: \$165 **Non-Members:** \$205

Course Hours: 8:30am-12:00pm

Level: Update **CPE Credit:** 4 **VENDOR:** MSCPA **ACRONYM:** ERR-1 / ERRW-1

Course objectives and description: This seminar satisfies the State Board's approved ethics covering Mississippi Rules, AICPA Code of Conduct, ethics in your tax practice and ethical behavior.

1/23/2025
Thursday
Ridgeland
MSCPA

MS Rules and Regulations

Discussion Leader: Donna Ingram

Cost: Members: \$40 **Non-Members:** \$60

Course Hours: 1:00pm-1:50pm

Level: Update **CPE Credit:** 1 **VENDOR:** MSCPA **ACRONYM:** MRR / MRRW

Course objectives and description: This seminar satisfies the State Board's approved ethics covering Mississippi Rules Regulations.

3/4/2025
Tuesday

Livestream Only: The Needed Focus on Cyber-Security

Discussion Leader: Karl Egnatoff

Cost: Members: \$80 **Non-Members:** \$120

Course Hours: 12:00pm-1:40pm

Level: Basic **CPE Credit:** 2 **VENDOR:** Taymes, LLC **ACRONYM:** NFCSW

Course objectives and description: The ability for an organization to operate without cyber-tools no longer exists. The growth in dependence on connective technology continues to become more significant as telecommuting expands, and the fourth industrial revolution unfolds. The most publicized instances of theft and fraud all now relate to cyber incursions. This session explains the scope of cyber-tools now regularly used by business, details the importance of these tools, and looks at currently used as well as evolving controls to protect this important segment of business operations. Those involved in creating measures to secure a company's cyber-footprint would benefit by taking this session.

3/11/2025
Tuesday

Livestream Only: Steps to Stop External Fraud

Discussion Leader: Karl Egnatoff

Cost: Members: \$80 **Non-Members:** \$120

Course Hours: 12:00pm-1:40pm

Level: Basic **CPE Credit:** 2 **VENDOR:** Taymes, LLC **ACRONYM:** SSEFW

Course objectives and description: Until recently, a percentage of organizations discounted risk related to external fraud attempts. Most were only concerned with protecting physical assets such as inventory or fixed assets. However, because of the many highly publicized corporate hacking events, such as the ones that affected the Colonial Pipeline and JBS Meats, more attention is being paid to external fraud risk of all types. In this session, we look at what is included in a definition of external fraud and then delve into specific control issues that can give rise to increased risk. We then discuss measures that organizations can employ to help reduce exposure to external attacks.

3/18/2025
Tuesday

NEW Livestream Only: How AI Fits into the Accounting World

Discussion Leader: Karl Egnatoff

Cost: Members: \$80 **Non-Members:** \$120

Course Hours: 12:00pm-1:40pm

Level: Basic **CPE Credit:** 2 **VENDOR:** Taymes, LLC **ACRONYM:** HAIFW

Course objectives and description: This session is designed as a primer to introduce artificial intelligence (AI) and to discuss how it will impact accountants as they work. The material will briefly explain what AI is and then focus on ways that it is already serving those in the accounting realm. It will close with a look at future AI-centric developments that will have great potential to positively impact the accounting profession. Those wishing to gain an understanding of what artificial intelligence is and how it will be used by accountants should consider attending this session.

Course Information *continued*

- 3/25/2025** **NEW** **Livestream Only: What's New in Excel®**
Tuesday
Discussion Leader: Karl Egnatoff
Cost: Members: \$80 Non-Members: \$120
Course Hours: 12:00pm-1:40pm
Level: Basic **CPE Credit:** 2 **VENDOR:** Taymes, LLC **ACRONYM:** WNIEW
Course objectives and description: Everyone knows that Excel® is the most widely used spreadsheet application in the world today. However, because it is ever-changing, many users are unable to keep up with the latest features and capabilities of this ubiquitous application. In this session, we look at some of the most helpful new features and tools that have been added to both the Desktop version of Excel® and the Web version. Content like this is valuable to anyone that regularly works with Excel® - We hope you will attend!
- 4/17/2025** **NEW** **Livestream Only: CPA Mock Exam**
Thursday
Discussion Leader: N/A
Cost: Members: \$0 Non-Members: \$0
Course Hours: 12:00pm-4:00pm
Level: CPE **Credit:** 0 **VENDOR:** Surgent **ACRONYM:** MOCEXAM1
Course objectives and description: You are invited to participate in a live 4-hour mock CPA Exam virtual workshop hosted by Mississippi Society of CPAs and Surgent CPA Review to see if you are ready to ace the exam.
This unique opportunity will allow you to experience what it is like to sit for any CPA Exam section as you immerse yourself in questions pulled from the actual CPA Exam Blueprints. Plus, you will leave the session with your own personalized ReadySCORE (an accurate measurement of your actual exam score) as well as a detailed report showing your areas of strength and weakness for that section. Individuals taking the Mock CPA Exam may choose any of the six exams to take (from the 3 Core exams or from the 3 Discipline exams).
- 4/23/2025** **Young CPA Leadership Conference**
Wednesday
Ridgeland
MSCPA
Discussion Leader: Panel
Cost: Members: \$150 Non-Members: \$150
Course Hours: 8:30am-4:30pm
Level: Intermediate **CPE Credit:** 8 **VENDOR:** MSCPA **ACRONYM:** YCPAC / YCPACW
Course objectives and description: This Mississippi Young CPA Network event is for all young and aspiring CPAs, young professionals, and everyone else looking to build success skills to get ahead and to become leaders in their careers. For the best learning experience, in-person attendance is highly recommended.
- 4/30/2025** **NEW** **Livestream Only: CPA's CAN Go to Jail for Ethical Lapses**
Wednesday
Discussion Leader: Jim Martin
Cost: Members: \$80 Non-Members: \$120
Course Hours: 12:00pm-1:40pm
Level: Update **CPE Credit:** 2 **VENDOR:** Jim Martin, CPA **ACRONYM:** CPAELW
Course objectives and description: The focus of this class is the application of AICPA Ethics Standards to the local practitioner who practices in the real world as well as those in industry! It covers the AICPA principles of professional conduct and the additional topic of CPAs doing hard time for ethical lapses. An open your eyes look at how we can get into trouble!
- 5/2/2025** **MS Rules and Regulations**
Friday
Ridgeland
MSCPA
Discussion Leader: Donna Ingram
Cost: Members: \$40 Non-Members: \$60
Course Hours: 1:00pm-1:50pm
Level: Update **CPE Credit:** 1 **VENDOR:** MSCPA **ACRONYM:** MRR-2 / MRRW-2
Course objectives and description: This seminar satisfies the State Board's approved ethics covering Mississippi Rules Regulations.
- 5/7/2025** **Livestream Only: Hot Topics: Mgt of Accounting Practice/Firm Administration**
Wednesday
Discussion Leader: TBD
Cost: Members: \$40 Non-Members: \$40
Course Hours: 11:00am-12:00pm
Level: Advanced **CPE Credit:** 1 **VENDOR:** MSCPA **ACRONYM:** MAPW1
Course objectives and description: Join other managing partners, firm leaders, and firm administrators for this interactive session to discuss hot topics in managing your accounting practice. This session will explore CAS opportunities by unlocking new revenue streams through advisory services.
- 5/12/2025** **MS Sales and Use Tax**
Monday
Ridgeland
MSCPA
Discussion Leaders: Emily Joorfetz & Patrick Sanford
Cost: Members: \$165 Non-Members: \$205
Course Hours: 8:30am-12:00pm
Level: Update **CPE Credit:** 4 **VENDOR:** MSCPA **ACRONYM:** MSUT / MSUTW
Course objectives and description: This seminar, led by representatives of the Mississippi Department of Revenue, will include an Introduction on Sales Tax: Levies, Returns and Filing, and Exemptions; Use Tax; Casual Sales Tax; Industry-Specific Sales Tax; Contractor's Tax; and more. This seminar will be a great opportunity to get the latest Sales and Use Tax information directly from the Department of Revenue.

<p>5/12/2025 Monday Ridgeland MSCPA</p>	<p>Ethics and Professional Conduct Discussion Leader: Donna Ingram Cost: Members: \$165 Non-Members: \$205 Course Hours: 1:00pm-4:30pm Level: Update CPE Credit: 4 VENDOR: MSCPA ACRONYM: ERR-2 / ERRW-2 Course objectives and description: This seminar satisfies the State Board’s approved ethics covering Mississippi Rules, AICPA Code of Conduct, ethics in your tax practice and ethical behavior.</p>
<p>5/13-14/2025 Tuesday/Wednesday</p>	<p>Livestream Only: MS Technology Conference Discussion Leader: Panel Cost: Members: \$500 Non-Members: \$620 Course Hours: 8:30am-4:30pm Level: Intermediate CPE Credit: 16 VENDOR: K2 ACRONYM: MTCW Course objectives and description: The Technology Conference offers up to sixteen hours of fast-paced presentations designed to make you more productive and efficient when using technology. K2 Enterprises’ nationally recognized speakers provide you with practical solutions to the real-world issues faced by accounting, financial, and other business professionals. You will receive helpful tips and advanced techniques, along with the tools and skills necessary to keep up with the ever-increasing pace of changes in technology.</p>
<p>5/15/2025 Thursday Ridgeland MSCPA</p>	<p>Advanced Audits of 401(k) Plans: Best Practices and Current Developments Discussion Leader: Cecil M. (Bill) Felder Cost: Members: \$290 Non-Members: \$360 Course Hours: 8:30am-4:30pm Level: Advanced CPE Credit: 8 VENDOR: Surgent ACRONYM: AAFP / AAFPW Course objectives and description: Looking to improve the quality of your 401(k) benefit plan audits? This is the course for you. Based on recent data from the U.S. Department of Labor and peer reviews on employee benefit plan audits, we know auditors need to up their game to meet stakeholder demands and provide the best possible audit services. In this advanced course, we will discuss the audit and reporting requirements in accordance with SAS 136 and other recently issued SASs. We will also discuss laws and regulations (such as ERISA) that are unique to employee benefit plans and provide practical guidance on their application. Course topics will focus on the most common compliance issues identified in 401(k) audits by the Department of Labor and peer reviews, as well as recommended corrections. Auditors will identify best practices for auditing areas such as payroll and compensation, participant loans, hardship distributions, investments, and plan mergers and acquisitions.</p>
<p>5/16/2025 NEW Friday Ridgeland MSCPA</p>	<p>CFO Fundamentals: Assessing Risk, Navigating Change, and Other Duties as Assigned Discussion Leader: Steven Mulhollen Cost: Members: \$290 Non-Members: \$360 Course Hours: 8:30am-4:30pm Level: Intermediate CPE Credit: 8 VENDOR: Steven Mulhollen, CPA ACRONYM: CFOF / CFOFW Course objectives and description: The role of the Chief Financial Officer continues to evolve beyond the traditional role of strategic accounting and financial management. Today’s CFO must provide strategic leadership in risk management, human capital, and operations functions. This course explores the fundamentals of the modern CFO, including risk management, change leadership, human capital, budgeting, and forecasting. This course is designed for CFOs or aspiring CFOs of small to mid-sized businesses and not for profits.</p>
<p>5/19/2025 Monday Ridgeland MSCPA</p>	<p>Construction Contractors: Critical Accounting, Auditing, and Tax Issues Discussion Leader: Andy Copeland Cost: Members: \$290 Non-Members: \$360 Course Hours: 8:30am-4:30pm Level: Intermediate CPE Credit: 8 VENDOR: Surgent ACRONYM: CONS / CONSW Course objectives and description: Accounting and financial reporting for construction contractors may be the most difficult area to be in compliance with the various standards. Construction engagements are, in many instances, more “dangerous” than most lines of business due to the many users of the financial statements. In this course, we will discuss why construction accounting and financial reporting are so complex and discuss the relationship between the contractor and the surety, both from an underwriting and claims perspective. We will also explore what the surety looks for in order to maximize potential bond credit, and we will discuss key areas of tax compliance concentrating on those areas which make construction unique, including the impact of recent tax legislation.</p>
<p>5/20-21/2025 Tuesday/Wednesday Ridgeland MSCPA</p>	<p>Business and Industry: Management Development Conference Discussion Leader: Panel Cost: Members: \$355 Non-Members: \$475 Course Hours: 8:30am-4:30pm Level: Intermediate CPE Credit: 16 VENDOR: MSCPA ACRONYM: PMD / PMDW Course objectives and description: Business and Industry: Management Development Conference is geared toward chief financial officers, controllers and other executives in industry, managers, and partners in public accounting. Complete agenda forthcoming.</p>

Course Information *continued*

5/22/2025

Thursday
Ridgeland
MSCPA

Accounting and Auditing Conference

Discussion Leader: Panel

Cost: Members: \$225 **Non-Members:** \$300

Course Hours: 8:30am-4:30pm

Level: Intermediate **CPE Credit:** 8 **VENDOR:** MSCPA **ACRONYM:** AAC / AACW

Course objectives and description: 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. Complete agenda forthcoming.

5/23/2025

Friday
Ridgeland
MSCPA

Employer's Handbook: Legal, Tax, and Health Care Issues

Discussion Leader: William F. (Bill) Taylor

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am-4:30pm

Level: Basic **CPE Credit:** 8 **VENDOR:** Surgent **ACRONYM:** HTOF / HTOFW

Course objectives and description: The employer-employee relationship strains both sides in uncertain times, and businesses need CPAs, controllers, and other advisors to provide understanding of the complex legal, tax, and health care issues associated with all aspects of employment. This course provides in-depth coverage of this critical area. It will be updated and supplemented throughout the year to cover breaking developments.

5/27/2025

Tuesday
Ridgeland
MSCPA

The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent

Discussion Leader: William F. (Bill) Taylor

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am-4:30pm

Level: Update **CPE Credit:** 8 **VENDOR:** Surgent **ACRONYM:** BCPE / BCPEW

Course objectives and description: This year practitioners need to keep abreast of tax changes affecting pass-through entities used by their business clients and employers, and this enlightening course delivers that information. You will learn invaluable strategies, techniques, innovative tax-planning concepts, income-generating ideas, and other planning opportunities available to S corporations, partnerships, LLCs, and LLPs. In addition, this course will discuss current trends and emerging issues, helping practitioners stay informed about relevant and significant topics that may impact their clients. Continually updated to reflect enacted legislation.

5/28/2025

Wednesday
Ridgeland
MSCPA

Hot IRS Tax Examination Issues for Individuals and Businesses

Discussion Leader: William F. (Bill) Taylor

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am-4:30pm

Level: Intermediate **CPE Credit:** 8 **VENDOR:** Surgent **ACRONYM:** EXIB / EXIBW

Course objectives and description: The Inflation Reduction Act increased the IRS budget. As a result, the IRS continues to replenish its audit workforce. The IRS trains its audit workforce by examining the tax returns of individuals and small businesses. Now, more than ever, Accounting, Tax, and Financial Professionals need clients to understand the need for documentation and procedures to substantiate what IRS examiners are pursuing. Learn the high audit risk areas and ways to help clients survive an IRS audit with little or no change. It is critical for Accounting, Tax, and Financial Professionals in public accounting to understand the risk to clients and to themselves in tax return preparation and planning since the IRS continues to increase its audit coverage and is examining more taxpayers than it has in the recent past.

5/29/2025 **NEW**

Thursday
Ridgeland
MSCPA

Enterprise Risk Management

Discussion Leader: Mark Conine

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am-4:30pm

Level: Intermediate **CPE Credit:** 8 **VENDOR:** Mark Conine, CPA **ACRONYM:** ERM / ERMW

Course objectives and description: This course offers a comprehensive exploration of critical risks that businesses encounter, including strategic, financial, operational, cybersecurity, and compliance risks. Attendees will learn to identify, assess, and manage these risks through practical applications. The curriculum emphasizes the development of effective risk mitigation strategies to enhance organizational resilience and ensure long-term success.

5/30/2025 **NEW**

Friday
Ridgeland
MSCPA

Financial Forensics

Discussion Leader: Mark Conine

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am-4:30pm

Level: Intermediate **CPE Credit:** 8 **VENDOR:** Mark Conine, CPA **ACRONYM:** FF / FFW

Course objectives and description: This course provides an in-depth exploration of financial forensics, focusing on the principles and techniques used to investigate financial crimes and analyze accounting data as evidence. Attendees will learn to detect and prevent fraudulent activities and applying investigative auditing methods. Key topics include the identification of financial fraud, and analysis of financial evidence. The curriculum emphasizes the development of skills necessary to assess organizations' susceptibility to financial fraudulent activities and to communicate findings effectively.

6/2/2025

Monday
Ridgeland
MSCPA

Business Law Essentials for Practitioners and Controllers (Virtual Speaker)

Discussion Leader: Curtis Quickel

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am-4:30pm

Level: Basic **CPE Credit:** 8 **VENDOR:** Surgent **ACRONYM:** BLAW / BLAWW

Course objectives and description: This course covers basic legal principles that every accountant should be familiar with to avoid common legal disputes and costly litigation. By analyzing business law issues from the standpoint and background of accountants and auditors, this course will help you develop an approach to client and practice issues with a sensitivity and appreciation for potential legal ramifications.

6/3/2025

Tuesday
Ridgeland
MSCPA

Estate and Life Planning Issues for the Middle-Income Client

Discussion Leader: Harris H. (Trip) Barnes III

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am - 4:30pm

Level: Basic **CPE Credit:** 8 **VENDOR:** Surgent **ACRONYM:** PMIC / PMICW

Course objectives and description: Clients think that estate planning only applies to the very rich. In truth, there are many issues of critical concern for which the middle-income client needs to plan. This course is a must-attend for all Accounting and Financial Professionals who work with middle-income clients and are looking for ways to provide additional quality services. Continually updated with the latest guidance.

6/4/2025

Wednesday
Ridgeland
MSCPA

Surgent's Individual and Financial-Planning Tax Camp

Discussion Leader: William F. (Bill) Taylor

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am - 4:30pm

Level: Intermediate **CPE Credit:** 8 **VENDOR:** Surgent **ACRONYM:** IFCP / IFCPW

Course objectives and description: Each year brings its own set of tax planning challenges, and this year is no exception. This course aims to arm tax planners with planning strategies and ideas that all clients, but in particular, wealthy clients, middle-income clients, and closely held business owners need to consider right now to take advantage of present opportunities and plan for future tax advantages. Learn strategies that can really have an impact on client lives, while also bringing value to you and your firm. This material is continuously updated for recent legislation impacting individual taxpayers.

6/5/2025

Thursday
Ridgeland
MSCPA

Succession Planning for the Small Business Owner: Finding the Exit Ramp

Discussion Leader: William F. (Bill) Taylor

Cost: Members: \$165 **Non-Members:** \$205

Course Hours: 8:30am – 12:00pm

Level: Intermediate **CPE Credit:** 4 **VENDOR:** Surgent **ACRONYM:** BSP4 / BSP4W

Course objectives and description: The life cycle of the small business can be summed up in three segments: 1) starting the business; 2) operating the business; and 3) getting out of the business. This course focuses on getting out of the business. The most elusive element of owning a small business can be finding the proper exit strategy. This course is designed to provide the business consulting practitioner with tools and concepts to advise the small business owner and assist them in developing the right exit strategy. The course covers exit strategies related to third-party sales and succession planning within a family.

6/5/2025

Thursday
Ridgeland
MSCPA

Taxation of Partnership Distributions and Sales of Partnership

Discussion Leader: William F. (Bill) Taylor

Cost: Members: \$165 **Non-Members:** \$205

Course Hours: 1:00pm - 4:30pm

Level: Basic **CPE Credit:** 4 **VENDOR:** Surgent **ACRONYM:** PDS4 / PDS4W

Course objectives and description: This program focuses on two parts of Subchapter K, partnership distributions and sales of partnership interests and topics that tax practitioners are often asked about by clients. Tax practitioners are called upon to advise both the partnership which makes distributions and the partners receiving the distributions regarding the tax consequences of these transactions. Additionally, tax practitioners will be deeply involved in decisions regarding the sale and purchase of a partnership interest. These topics are thoroughly covered in this program. The presenters also discuss several types of partnership distributions and the tax rules relating to them, as well as analyze the tax rules relating to the sale of a partnership interest. Tax practitioners will be given an in-depth analysis of these complex topics, so that they can effectively answer their clients' questions.

Course Information *continued*

6/6/2025

Friday
Ridgeland
MSCPA

Preparing Not-for-Profit Financial Statements

Discussion Leader: Cecil M. (Bill) Felder

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am - 4:30pm

Level: Intermediate **CPE Credit:** 8 **VENDOR:** Surgent **ACRONYM:** ENFP / ENFPW

Course objectives and description: In order to prepare accurate and effective not-for-profit financial statements, professionals must have a strong working knowledge of the reporting requirements. Now is the time to obtain that knowledge! This course explains the requirements, illustrates how the requirements manifest in the financial statements, and clarifies options available to not-for-profits in applying the requirements. The course covers key accounting areas that affect not-for-profits, including net assets, contributions, and functional expense reporting. The course materials utilize a highly illustrative and innovative format, including over 30 focused exercises to provide an enhanced working knowledge of not-for-profit accounting and reporting. This course qualifies for Yellow Book.

6/9/2025

Monday
Ridgeland
MSCPA

Evaluating Fraud Risk in a Financial Statement Audit (Virtual Speaker)

Discussion Leader: Curtis Quickel

Cost: Members: \$165 **Non-Members:** \$205

Course Hours: 8:30am-12:00pm

Level: Basic **CPE Credit:** 4 **VENDOR:** Surgent **ACRONYM:** ARF4 / ARF4W

Course objectives and description: The Association of Certified Fraud Examiners says that there is fraud lurking in all businesses, including not-for-profit organizations. It often goes undetected for years and when uncovered, management and the board may question why an auditor did not identify it. The auditor's responsibility in a financial statement audit is to assess risk and perform sufficient procedures to obtain reasonable assurance that the financial statements are free from material misstatement due to fraud or error. However, failure to perform an adequate fraud risk assessment and report deficiencies in internal control, such as a lack of segregation of duties, can leave a firm vulnerable. This course will discuss the audit procedures that should be performed in accordance with AU-C §240 as recently amended, best practices in performing fraud risk assessment procedures, when and how to report control deficiencies noted in an audit, and the most frequent types of fraud found in small to mid-sized entities along with internal controls that could be implemented to help prevent and detect them. We will look at various cyber fraud schemes and how they might be prevented or detected, the use of analytics as fraud risk procedures, and assessments of fraud risk in a Single Audit.

6/9/2025

Monday
Ridgeland
MSCPA

Annual FASB Update and Review (Virtual Speaker)

Discussion Leader: Curtis Quickel

Cost: Members: \$165 **Non-Members:** \$205

Course Hours: 1:00pm-4:30pm

Level: Intermediate **CPE Credit:** 4 **VENDOR:** Surgent **ACRONYM:** FUR4 / FUR4W

Course objectives and description: This course provides a detailed discussion on the key topics related to financial reporting, though in a summarized format. The course will focus on recent ASUs issued by the FASB with a concentration on issues of greatest significance to most accounting practitioners, including recently released ASUs. Specifically, the course will review recently issued FASB standards on leases and provide an update on ASC 842 and ASC 326 post-implementation items and other hot button accounting issues, such as what is on the FASB's technical agenda. This course is the place to go for a succinct but thorough update on the big topics impacting financial accounting and reporting.

6/10/2025

Tuesday
Ridgeland
MSCPA

Integrated Planning, Forecasting, and Budgeting for Organizational Success (Virtual Speaker)

Discussion Leader: Curtis Quickel

Cost: Members: \$165 **Non-Members:** \$205

Course Hours: 8:30am-12:00pm

Level: Intermediate **CPE Credit:** 4 **VENDOR:** Surgent **ACRONYM:** PLF4 / PLF4W

Course objectives and description: Planning may be one of the most important assignments of the finance professional; however, it is often accomplished in a way that can harm the organization. In many cases, huge sums are spent only to have a planning document developed that does not serve to bring the company together, but rather causes internal division. In some situations the budget can actually harm both productivity and alignment. This course is designed to bring planning, budgeting, and forecasting together into one fully aligned process that is easier, more efficient, and fully engages all parts of the organization. Rather than the plan being owned by the finance department, it is owned and followed by everyone from the CEO to the entry-level employee.

6/10/2025

Tuesday
Ridgeland
MSCPA

Controller/CFO Update: Hot Topics Facing Today's Financial Professional (Virtual Speaker)

Discussion Leader: Curtis Quickel

Cost: Members: \$165 **Non-Members:** \$205

Course Hours: 1:00pm-4:30pm

Level: Update **CPE Credit:** 4 **VENDOR:** Surgent **ACRONYM:** TCF4 / TCF4W

Course objectives and description: In today's rapidly changing world, finance professionals are required to wear many hats and are often the keys to the success of the organization. On one hand, they need to be abreast of the latest proven financial skills for making the best decisions, and on the other hand they need the best skills to motivate, manage, and lead people. Being pigeon-holed into one area or another is neither good for career building nor good for the organization. This reality has proven to be even more true with the advent of COVID-19. We'll cover the latest issues that all CFOs and controllers need to know about and provide how-to guidance to allow for immediate use in their organizations. The program is focused on organizational success and will concentrate on ways to manage risk and achieve greater productivity.

<p>6/11/2025 Wednesday Ridgeland MSCPA</p>	<p>NEW</p>	<p>A Brief History of the Universe: But Mostly Business Entity Tax Treatment Discussion Leader: Michael Carraway Cost: Members: \$165 Non-Members: \$205 Course Hours: 8:30am-12:00pm Level: Basic CPE Credit: 4 VENDOR: MSCPA ACRONYM: BETT / BETTW Course objectives and description: Tax treatment of business entities has evolved over decades, as have the different types of entities themselves. Mike Carraway explores their similarities, key differences, limitations and resultant opportunities, with a little history included, including C corporations, S corporations, partnerships, LLCs, and wholly-owned unincorporated businesses. Attendees will gain a greater understanding of many of the key tax aspects of various business entity vehicles, including advantages and drawbacks.</p>
<p>6/11/2025 Wednesday Ridgeland MSCPA</p>	<p>NEW</p>	<p>Fiduciary Tax: What You Didn't Know You Need to Know Discussion Leader: Jessica Cooley Cost: Members: \$165 Non-Members: \$205 Course Hours: 1:00pm-4:30pm Level: Basic CPE Credit: 4 VENDOR: MSCPA ACRONYM: FTWD / FTWDW Course objectives and description: Whether you're new to fiduciary tax or seeking to refine your expertise, this course is packed with actionable knowledge that will elevate your understanding of fiduciary tax concepts. The session will allow attendees to gain practical insights into key tax reporting requirements for fiduciaries, navigate the complexities of income distribution deductions, further awareness of various trust types and related tax concepts, including special elections and rules as well as tax effects for beneficiaries.</p>
<p>6/12/2025 Thursday Ridgeland MSCPA</p>	<p>NEW</p>	<p>In Person: Mississippi Board Rules & Regulations Discussion Leader: Billy Morehead Cost: Members: \$165 Non-Members: \$205 Course Hours: 8:30am-12:00pm Level: Update CPE Credit: 4 VENDOR: MSCPA ACRONYM: ERR-3 / ERRW-3 Course objectives and description: This seminar satisfies the State Board's requirement for three hours of general ethics and one hour of Mississippi Rules and Regulations.</p>
<p>6/12/2025 Thursday Ridgeland MSCPA</p>	<p>NEW</p>	<p>Leading with Internal Controls Discussion Leader: Billy Morehead Cost: Members: \$165 Non-Members: \$205 Course Hours: 1:00pm-4:30pm Level: Update CPE Credit: 4 VENDOR: MSCPA ACRONYM: LWIC / LWICW Course objectives and description: Strong internal controls help build efficient and effective organizations. Great leaders use internal controls to help guide dynamic organizations. No matter the person, how compelling the vision, or how brilliant the strategy is, without leadership grounded in strong internal controls, there is bound to be a failure in execution. Gaining buy-in, building trust, and inspiring loyalty are skills developed over time...often through the "School of Hard Knocks." A leader sets the "Tone at the Top" through actions, policies, values, influence, and day-to-day activities; a leader must learn how to communicate to stakeholders through authentic messages and powerful conversations. These skills are all grounded in strong internal controls. We will study the speaker's award-winning article, The Anatomy of a Fraud, to see the best practices of internal control every entity, especially smaller ones, can use to deter fraud. We will focus on serious and funny experiences over the speaker's 30+ year career in government financial management to connect the dots between leadership, building effective teams, and COSO & Green Book internal controls. (Will meet Yellow Book CPE requirements.)</p>
<p>6/13/2025 Friday Ridgeland MSCPA</p>		<p>Surgent's Individual Income Tax Update (Virtual Speaker) Discussion Leader: John Kilroy Cost: Members: \$165 Non-Members: \$205 Course Hours: 8:30am-12:00pm Level: Update CPE Credit: 4 VENDOR: Surgent ACRONYM: BIT4 / BIT4W Course objectives and description: This highly informative course will bring you up-to-speed on the latest in individual tax law developments and the corresponding or responsive planning opportunities available to your clients. You will come away from the course ready to educate your individual tax clients and implement tax-savings ideas that will serve their ever-evolving needs. Continually updated to reflect enacted legislation.</p>
<p>6/13/2025 Friday Ridgeland MSCPA</p>		<p>Key Partnership and S Corporation Tax Planning Strategies (Virtual Speaker) Discussion Leader: John Kilroy Cost: Members: \$165 Non-Members: \$205 Course Hours: 1:00pm-4:30pm Level: Intermediate CPE Credit: 4 VENDOR: Surgent ACRONYM: BTS4 / BTS4W Course objectives and description: Most of our clients are pass-through entities for which many of the general business strategies are subject to additional limitations. To provide the tax planning strategies for closely held business clients that will bring more revenue, this course focuses on the special concerns and techniques the practitioner needs to thrive in this market.</p>

Course Information *continued*

6/16/2025

Monday
Ridgeland
MSCPA

Securing a Comfortable Retirement in the Age of Spending

Discussion Leader: William F. (Bill) Taylor

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am - 4:30pm

Level: Intermediate **CPE Credit:** 8 **VENDOR:** Surgent **ACRONYM:** SCRT / SCRTW

Course objectives and description: This course gives CPAs the knowledge to help their clients plan for retirement by evaluating how much retirement income will be required and strategizing about how to reach retirement goals.

6/17/2025

Tuesday
Ridgeland
MSCPA

Social Security and Medicare: Planning for You and Your Clients

Discussion Leader: William F. (Bill) Taylor

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am - 4:30pm

Level: Basic **CPE Credit:** 8 **VENDOR:** Surgent **ACRONYM:** SSRB / SSRBW

Course objectives and description: Social Security seems poised for changes in benefits and eligibility age. The leading edge of the baby boomer generation has already reached retirement age. Financial and tax planners can expect increased demand for strategies that dovetail Social Security with other retirement and estate planning objectives. This course provides tax and financial planning professionals with both the background information on the Social Security system and the strategies clients will need in dealing with Social Security, and the myriad of other related retirement planning issues.

6/18/2025

Wednesday

Livestream Only: Implementing and Maintaining an Internal Control System

Discussion Leader: Karl Egnatoff

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am - 4:30pm

Level: Intermediate **CPE Credit:** 8 **VENDOR:** Taymes, LLC **ACRONYM:** IMICW

Course objectives and description: Many organizations are successful as they create a system of internal controls, however some fail to properly implement the measures that are established. Moreover, entities regularly neglect the important process of testing, monitoring, and updating control procedures, which weakens the entire internal control structure. This session provides an overview of control creation methods and discusses ways to successfully implement policies and procedures. Additionally, it includes an array of control maintenance checklists that participants can take and adapt to their organization as they work to improve policies and procedures. Finally, it provides an understanding of the need for dynamic, fluid controls that adapt to changes in business tools and methods. Participants that take this course will have a strengthened ability to implement and maintain an internal control system.

6/19/2025

Thursday

Livestream Only: Advanced Excel® Topics for Spreadsheet Power Users

Discussion Leader: Karl Egnatoff

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am - 4:30pm

Level: Intermediate **CPE Credit:** 8 **VENDOR:** Taymes, LLC **ACRONYM:** AXLTW

Course objectives and description: Accountants and other business professionals that work in Excel® extensively become very strong with many aspects of the ubiquitous spreadsheet application. They, however, often do not have knowledge of the numerous advanced features available in Excel®. In this session we highlight many of the powerful tools found in Excel® and provide details as to how they are beneficial and how they are used. Topics include data connectivity, advanced functions available for formula creation, Tables and PivotTables, and charting tools. Many proficient Excel® users only utilize a limited percentage of the available functionality when they work with spreadsheets, which is like tying one's hands behind his back. This session will help make participants "two-fisted" Excel® users!

6/20/2025

Friday

Livestream Only: Making Excel Formulas Work for You

Discussion Leader: Karl Egnatoff

Cost: Members: \$165 **Non-Members:** \$205

Course Hours: 8:30am - 12:00pm

Level: Intermediate **CPE Credit:** 4 **VENDOR:** Taymes, LLC **ACRONYM:** MEFW

Course objectives and description: A great many Excel® users do not realize how powerful and versatile formulas can be. Additionally, some are intimidated by formulas that do not behave as expected. In this session, we step through the basic and then the more complex formula conventions. We then review the function library and discuss details on how they (functions) can best be used. Finally, we spend time reviewing some of the ways formulas can be helpful and time saving. Users that want to learn how to "program" Excel® should take this session!

- 6/20/2025** **NEW** **Livestream Only: How AI is Automating Internal Control**
 Friday
Discussion Leader: Karl Egnatoff
Cost: Members: \$165 **Non-Members:** \$205
Course Hours: 1:00pm - 4:30pm
Level: Intermediate **CPE Credit:** 4 **VENDOR:** Taymes, LLC **ACRONYM:** HAIAW
 Course objectives and description: The term “artificial intelligence” (AI) has become mainstream and while most have a layperson understanding of AI, few know the depth and breadth of these technologies’ capabilities. AI is affecting just about everything in business and in people’s personal lives. The operation of an internal control system is also changing because of this incredible advancement. This session explains what AI is and how it works and then goes into detail about how it can be applied to a system of internal control. The material speaks about changes occurring in today’s world as well as to what’s coming in the not too distant future.
- 6/23/2025** **NEW** **Communicating to Colleagues - Making the Numbers Make Sense**
 Monday
 Ridgeland
 MSCPA
Discussion Leader: Bob Mims
Cost: Members: \$290 **Non-Members:** \$360
Course Hours: 8:30am - 4:30pm
Level: Intermediate **CPE Credit:** 8 **VENDOR:** Bob Mims, CPA **ACRONYM:** PIU / PIUW
 Course objectives and description: This course is designed to enhance the presentation skills of CPAs and CFOs by emphasizing the importance of understanding and mastering the facts before delivering any presentation. The goal is to equip financial professionals with the tools needed to overcome fears and provide the best practices research on all types of presentations-from communicating complex financial information effectively to conducting a casual virtual meeting. This is a fun session intended to be interactive with participation either live, virtual or both. It is built to be a flexible course that involves live interaction, virtual engagement, or use of videos.
- 6/24/2025** **NEW** **Common Sense Solutions for Acct, Strategy, and the Evolving Role of the CFO**
 Tuesday
 Ridgeland
 MSCPA
Discussion Leader: Bob Mims
Cost: Members: \$290 **Non-Members:** \$360
Course Hours: 8:30am - 4:30pm
Level: Intermediate **CPE Credit:** 8 **VENDOR:** Bob Mims, CPA **ACRONYM:** CSSA / CSSAW
 Course objectives and description: We mostly focus on the income statement, but what about other financial statements and countless other accounting concerns? This seminar discusses some of the common balance sheet issues, both on-the-books and off, that have an impact on our stakeholders and the value of the organization. Using practical analysis, case discussions, and interactivity - we highlight several key tools in understanding and communicating the importance of the cornerstone of accounting: the balance sheet. We must understand the real drivers of accounting issues to ensure that the balance sheet will be exemplary. This seminar will also empower finance professionals with the foresight and practical tools needed to understand, anticipate, and mitigate both external and internal risks without discussing COSO. Ultimately the onus is on us to wear many hats and set strategy for our organizations and these modules are designed to assist us on this journey as leaders.
- 6/25/2025** **How to Settle a Client’s Estate (Virtual Speaker)**
 Wednesday
 Ridgeland
 MSCPA
Discussion Leader: Don Cochran
Cost: Members: \$290 **Non-Members:** \$360
Course Hours: 8:30am - 4:30pm
Level: Basic **CPE Credit:** 8 **VENDOR:** Surgent **ACRONYM:** SEAZ / SEAZW
 Course objectives and description: Federal estate and gift taxes currently affect few clients, but there are many other issues involved in settling an estate or administering a trust. Clients who are beneficiaries of a trust or estate often turn to their financial advisors to understand the administrative process and its effect on their interests. This course enables the accountant to cut through the jargon to understand the legal concepts, communicate a real-world explanation to clients, and serve, in some instances, as an advisor to them. After taking this course, practitioners will feel more confident to serve in a fiduciary capacity. Updated for developments relative to estate taxation.
- 6/26/2025** **NEW** **Performing Preparation, Compilation, and Review Engagements**
 Thursday
 Ridgeland
 MSCPA
Discussion Leader: Kurt Oestriecher
Cost: Members: \$290 **Non-Members:** \$360
Course Hours: 8:30am - 4:30pm
Level: Update **CPE Credit:** 8 **VENDOR:** Kurt Oestriecher, CPA **ACRONYM:** PPCRE / PPCREW
 Course objectives and description: The Accounting and Review Services Committee of the AICPA (ARSC) develops the SSARS. There are now three levels of engagements in the SSARS, Preparation, Compilation, and Review. The SSARS also now extend to engagements other than historical financial statements such as specified items, elements, and accounts, pro-forma financial information, and prospective financial information.
 If you perform any engagements under SSARS, this course is an absolute must. An in-depth discussion of all three levels of service will provide the necessary guidance to ensure that you are completing your engagements within standards.

Course Information *continued*

6/27/2025

Friday
Ridgeland
MSCPA

Ethics and Professional Conduct

Discussion Leader: Donna Ingram

Cost: Members: \$165 Non-Members: \$205

Course Hours: 8:30am-12:00pm

Level: Update **CPE Credit:** 4 **VENDOR:** MSCPA **ACRONYM:** ERR-4 / ERRW-4

Course objectives and description: This seminar satisfies the State Board's approved ethics covering Mississippi Rules, AICPA Code of Conduct, ethics in your tax practice and ethical behavior.

6/27/2025

Friday
Ridgeland
MSCPA

Fraud: Sign, Sign, Everywhere a Sign

Discussion Leader: Donna Ingram

Cost: Members: \$165 Non-Members: \$205

Course Hours: 1:00pm-4:30pm

Level: Intermediate **CPE Credit:** 4 **VENDOR:** MSCPA **ACRONYM:** SSES / SSESW

Course objectives and description: In this session we will discuss some of the tell-tale signs that may indicate fraud is occurring and various actions management may take in response. We will also cover prevent and detect controls and fraud investigative techniques.

6/30/2025 NEW

Monday
Ridgeland
MSCPA

Transforming Accounting with AI: Practical Insights and Applications

Discussion Leader: Thomas Newell

Cost: Members: \$290 Non-Members: \$360

Course Hours: 8:30am - 4:30pm

Level: Basic **CPE Credit:** 8 **VENDOR:** Surgent **ACRONYM:** TAAI / TAAIW

Course objectives and description: This course is designed to provide CPAs in public and private practice with the latest insights and practical knowledge on the integration of artificial intelligence (AI) in accounting. With a focus on real-world applications and ethical considerations, this course equips accounting professionals with the skills necessary to leverage AI for improved efficiency and accuracy in their work. Having previous experience or exposure to AI is not necessary. This course will provide actionable insights and training CPAs can use on future engagements regardless of where the CPAs are along their AI learning path.

7/9/2025 NEW

Wednesday

Livestream Only: Power BI Dashboards: Real Time Financial Visualizations

Discussion Leader: Marc Hamilton

Cost: Members: \$90 Non-Members: \$140

Course Hours: 8:30am-10:10am

Level: Intermediate **CPE Credit:** 2 **VENDOR:** MSCPA **ACRONYM:** PBIDW

Course objectives and description: Transform raw data into actionable insights with Power BI. This session introduces tools to build dynamic, interactive dashboards that clearly communicate performance metrics. Learn how to create visuals that empower better decision-making and impress stakeholders.

7/9/2025 NEW

Wednesday

Livestream Only: Advanced Power BI Techniques for CPA Dashboards

Discussion Leader: Marc Hamilton

Cost: Members: \$90 Non-Members: \$140

Course Hours: 10:20am-12:00pm

Level: Intermediate **CPE Credit:** 2 **VENDOR:** MSCPA **ACRONYM:** APBITW

Course objectives and description: Take your Power BI skills to the next level with advanced techniques for creating impactful dashboards. This session highlights custom visuals, data transformations, and interactivity to help you present compelling insights. Master the tools to make your dashboards unforgettable.

7/9/2025 NEW

Wednesday

Livestream Only: Document Automation for Financial Professionals

Discussion Leader: Marc Hamilton

Cost: Members: \$90 Non-Members: \$140

Course Hours: 1:00pm-2:40pm

Level: Intermediate **CPE Credit:** 2 **VENDOR:** MSCPA **ACRONYM:** DAFPW

Course objectives and description: Simplify your documentation process with AI-powered tools that reduce manual effort. This session introduces strategies to automate reports, engagement letters, and client communications, improving consistency and freeing time for higher-value work.

7/9/2025 NEW

Wednesday

Livestream Only: Budgeting and Variance Analysis with AI

Discussion Leader: Marc Hamilton

Cost: Members: \$90 Non-Members: \$140

Course Hours: 2:50pm-4:30pm

Level: Intermediate **CPE Credit:** 2 **VENDOR:** MSCPA **ACRONYM:** BVAAW

Course objectives and description: Discover how AI can revolutionize your approach to budgeting by creating models that adapt to real-time changes. This session explores tools to streamline variance analysis and provide deeper insights into financial performance. Learn how to make smarter, faster decisions with AI-driven budgeting techniques.

- 7/15/2025** **NEW** **Livestream Only: K2's Microsoft 365/Office 365 - All the things You Need to Know**
 Tuesday
Discussion Leader: Steve Yoss
Cost: Members: \$295 Non-Members: \$365
Course Hours: 9:00am-4:30pm
Level: Intermediate **CPE Credit:** 8 **VENDOR:** K2 **ACRONYM:** MSOW
 Course objectives and description: Microsoft 365/Office 365 continues to grow and evolve, yet most utilize only a fraction of the tools available in their subscription. For example, powerful resources such as SharePoint Online and audio and video conferencing can change how your organization communicates and collaborates. In contrast, more personal apps such as Teams, Planner, Flow, and Sway allow individuals to work more efficiently and effectively in virtually all facets of their jobs. Further, security enhancements to Office 365 mean that your organization can take advantage of all these features in a highly secure environment. Isn't it time you learned how to move beyond the traditional Microsoft 365/Office 365 applications such as Excel, Word, and Outlook and unleash all your subscription offers? Join us in this fast-paced and highly interactive seminar where you will learn what you need to know to succeed with Microsoft 365/Office 365.
- 7/16/2025** **NEW** **Livestream Only: 2025 Federal and State Income Tax Update for the Local Practitioner**
 Wednesday
Discussion Leader: Jim Martin
Cost: Members: \$80 Non-Members: \$120
Course Hours: 12:00pm-1:40pm
Level: Update **CPE Credit:** 2 **VENDOR:** Jim Martin, CPA **ACRONYM:** FSITUW-1
 Course objectives and description: There is a new sheriff in town! As always, an income tax update that focuses on the normal practitioner's clients. New government legislation presented from the perspective of what the typical tax practitioner needs to know. As an added bonus, changes in the local state rules are covered. Sprinkle in court cases that can apply to a lot of middle to high income taxpayers and you have a review that you can apply to the real world!
- 7/16/2025** **NEW** **Livestream Only: K2's Small Business Internal Controls, Security, and Fraud Prevention and Detection**
 Wednesday
Discussion Leader: Steve Yoss
Cost: Members: \$295 Non-Members: \$365
Course Hours: 9:00am-4:30pm
Level: Intermediate **CPE Credit:** 8 **VENDOR:** K2 **ACRONYM:** ITCW
 Course objectives and description: Internal controls are more important than ever, and their importance increases daily. However, internal controls present a challenge for many smaller organizations. This program will teach you how to evaluate, develop, and implement an effective internal control structure in a small business environment. You will identify how to assess risk in smaller organizations and implement preventive, detective, deterrent, and compensating controls to mitigate these risks, even without proper segregation of duties. Additionally, participating in this program will teach you technology-focused techniques for preventing and detecting fraud and securing information systems and sensitive data.
 For small organizations, maintaining an effective system of internal controls presents a significant challenge. Realistically, implementing many theoretical concepts surrounding internal controls may sometimes be impossible. Consequently, many internal control structures foster an environment where too much risk exists. This factor and uncontrolled information systems can often lead to disastrous results. Participate in this program to learn the necessary insights and tools to design, implement, and monitor small organizations' internal controls, security, and anti-fraud measures.
- 7/17/2025** **NEW** **Livestream Only: K2's Excel Charting And Visualizations**
 Thursday
Discussion Leader: Steve Yoss
Cost: Members: \$170 Non-Members: \$210
Course Hours: 9:00am-12:00pm
Level: Intermediate **CPE Credit:** 4 **VENDOR:** K2 **ACRONYM:** ECV4W
 Course objectives and description: Charts and graphs are nothing new. However, many professionals struggle with building compelling visualizations. If that statement describes you, participate in this session to improve your skills in creating Excel charts and other visualizations. As a result, you will create visualizations to enhance your communication skills.
 This session is much more than just a seminar on fundamental charts. Instead, in this session, you will learn how to create advanced charts that are interactive, dynamic, and aesthetically pleasing – three qualities that will help to ensure that your readers and audience will understand the data you are presenting. This seminar is a must if you want to improve your communication skills.
- 7/17/2025** **NEW** **Livestream Only: K2's Best Word, Outlook, And PowerPoint Features**
 Thursday
Discussion Leader: Steve Yoss
Cost: Members: \$170 Non-Members: \$210
Course Hours: 1:00pm-4:30pm
Level: Intermediate **CPE Credit:** 4 **VENDOR:** K2 **ACRONYM:** WPO4W
 Course objectives and description: Most professionals routinely use Word, Outlook, and PowerPoint, but many are self-taught and, as a result, have not used many of the best features of these three applications. Consequently, they often use "brute force," inefficient means when working with these three components of Microsoft Office. If that describes you, carve time out of your schedule to participate in this four-hour session. In it, you will learn how to work much more efficiently when using these tools to get better results in less time.

Course Information *continued*

7/26/2025 NEW
Saturday-Saturday
Port Canaveral, FL
Carnival Mardi Gras

Learn Voyage: CPE at Sea

Discussion Leader: Marc Hamilton **Guest A & A Speaker:** Jim Martin, CPA.

Cost: Members: \$950 **Non-Members:** \$1,050

Course Hours: 20

Level: Intermediate **CPE Credit:** 20 **VENDOR:** MSCPA **ACRONYM:** CPESEA1

Course objectives and description: 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 during this 7-day cruise aboard Carnival departing from Port Canaveral, Florida. For complete details, visit: www.learnvoyage.com.

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

7/29/2025 NEW
Tuesday

Livestream Only: K2's Microsoft Teams

Discussion Leader: Steve Yoss

Cost: Members: \$170 **Non-Members:** \$210

Course Hours: 9:00am-12:00pm

Level: Intermediate **CPE Credit:** 4 **VENDOR:** K2 **ACRONYM:** MST4W

Course objectives and description: Microsoft Teams is one of the most exciting personal and organizational productivity tools ever appearing on the business landscape. With Teams, you can communicate and collaborate easily and securely with others, including colleagues outside your organization. Further, you can extend the already-robust functionality in Teams by incorporating add-in solutions with just a few mouse clicks. Unfortunately, despite Teams' power and relatively simple interface, many organizations struggle to deploy and use Teams.

In this session, you will learn how to get up and running quickly in Teams to take full advantage of this powerful tool. More specifically, you will learn how to get started in Teams and critical decisions affecting your deployment. Also, you will learn how to work in Teams, take advantage of the chat, voice, and video call services, and share documents securely with others. Moreover, you will learn how to extend your Teams platform to external organizations for improved communication and collaboration. Additionally, you will identify how to add other applications to Teams and optimize Team's configuration for the best overall efficiency and security. If you are working with Teams or plan to do so, this is one CPE session you can't afford to miss!

7/29/2025 NEW
Tuesday

Livestream Only: Artificial Intelligence For Accounting And Financial Professionals

Discussion Leader: Steve Yoss

Cost: Members: \$170 **Non-Members:** \$210

Course Hours: 1:00pm-4:30pm

Level: Intermediate **CPE Credit:** 4 **VENDOR:** K2 **ACRONYM:** AIF4W

Course objectives and description: Discover the real-world power of Artificial Intelligence (AI) and equip yourself with the skills to conquer modern challenges in accounting and finance. In this engaging course, we demystify AI and unveil its practical applications, transforming it from theory into a hands-on tool. Learn the essential AI fundamentals and unlock its remarkable potential to boost your productivity and effectiveness alongside your team.

Explore the specific problem-solving capabilities of AI, tailored to address the unique challenges faced by accounting and financial professionals. Gain expertise in leveraging AI features integrated into everyday applications, including the ubiquitous Excel. Uncover how these features enable you to effortlessly detect fraud, identify potential transaction errors, and elevate your financial operations to new heights. Witness firsthand how AI is reshaping the present and future of your profession, positioning you at the forefront of this revolutionary wave.

7/30/2025 NEW
Wednesday

Livestream Only: K2's Advanced QuickBooks Tips And Techniques

Discussion Leader: Steve Yoss

Cost: Members: \$170 **Non-Members:** \$210

Course Hours: 9:00am-12:00pm

Level: Intermediate **CPE Credit:** 4 **VENDOR:** K2 **ACRONYM:** AQB4W

Course objectives and description: The QuickBooks platform – including the desktop and online environments – is one of the leading accounting solutions for small and growing businesses. Further, Intuit has incorporated numerous advanced features and changes into the tools over the past few releases. This seminar will teach you how to use many new and advanced features in the desktop and online environments to help you solve critical issues. For example, you will learn advanced inventory management techniques, including changing the default costing methodology and implementing lot and serial number tracking. You will also learn how to build complete sets of financial statements in Excel that link in real-time to underlying QuickBooks data files and how to create multi-company financial statements. Additionally, you will learn how to use the Client Data Review feature to streamline how to identify and correct errors and close accounting periods in QuickBooks.

Knowing how to take advantage of the advanced tools and features available can determine your level of success when working with QuickBooks. So, take advantage of this opportunity to learn about QuickBooks' "deep" features to maximize your effectiveness with QuickBooks.

7/30/2025 Wednesday	NEW	<p>Livestream Only: K2's Case Studies In Fraud And Technology Controls Discussion Leader: Steve Yoss Cost: Members: \$170 Non-Members: \$210 Course Hours: 1:00pm-4:30pm Level: Intermediate CPE Credit: 4 VENDOR: K2 ACRONYM: CFT4W Course objectives and description: Fraud plagues businesses at epidemic levels, and technology control failures are a major contributing factor. Using a case study approach, in this session, you will learn about the pervasiveness of fraud, the control failures that contribute to fraud, and what you can do to mitigate fraud risk. A specific focus of this course is the application of information technology general controls and information technology application controls. In this course, you will examine numerous reported fraud cases and identify the general control and application control failures that contributed to each fraud. By learning through these real-world case studies, you will be better positioned to reduce fraud risk.</p>
8/6/2025 Wednesday		<p>Livestream Only: Hot Topics: Mgt of Accounting Practice/Firm Administration Discussion Leader: TBD Cost: Members: \$40 Non-Members: \$40 Course Hours: 11:00am-12:00pm Level: Advanced CPE Credit: 1 VENDOR: MSCPA ACRONYM: MAPW2 Course objectives and description: Join other managing partners, firm leaders, and firm administrators for this interactive session to discuss hot topics in managing your accounting practice.</p>
8/19/2025 Tuesday Ridgeland MSCPA		<p>Agriculture and Farm Activities Conference Discussion Leader: Panel Cost: Members: \$225 Non-Members: \$300 Course Hours: 8:30am-4:30pm Level: Intermediate CPE Credit: 8 VENDOR: MSCPA ACRONYM: AFAC / AFACW Course objectives and description: This conference covers special tax rules and tax accounting methods pertaining to agricultural and farming activities and any tax law changes that affect farmers. Complete agenda forthcoming.</p>
8/20/2025 Wednesday	NEW	<p>Livestream Only: 2025 Compilation, Preparation and Review Update Discussion Leader: Jim Martin Cost: Members: \$80 Non-Members: \$120 Course Hours: 12:00pm-1:40pm Level: Update CPE Credit: 2 VENDOR: Jim Martin, CPA ACRONYM: CPRUW Course objectives and description: This course offers an in-depth look at issues that practitioners have been having in implementing preparation, compilation and review engagements. This course is presented from the perspective of a local firm practitioner. Several new accounting standards are integrated into the new materials as is an extensive discussion of non-attest services. A complete and thorough review of everything preparation, compilation and review for 2025 and beyond!</p>
8/21/2025 Thursday Ridgeland MSCPA		<p>Banking and Finance Conference Discussion Leader: Panel Cost: Members: \$225 Non-Members: \$300 Course Hours: 8:30am-4:30pm Level: Intermediate CPE Credit: 8 VENDOR: MSCPA ACRONYM: BFC / BFCW Course objectives and description: This conference highlights information and the latest developments in the banking industry. Don't miss this opportunity to receive key updates from top regulators, engage in discussions with bank leaders and firm partners, and prepare for the year ahead. Who should attend? Public practitioners with banks & savings institution clients, preparers and/or auditors of financial statements, financial executives working in both large and small institutions, as well as regulators, controllers, and CFOs. Complete agenda forthcoming.</p>
8/26/2025 Tuesday Ridgeland MSCPA		<p>F990 Update Discussion Leader: Brian Yacker Cost: Members: \$290 Non-Members: \$360 Course Hours: 8:30am-4:30pm Level: Intermediate CPE Credit: 8 VENDOR: Brian Yacker, CPA ACRONYM: F990 / F990W Course objectives and description: This full-day presentation will focus on providing guidance to most effectively and efficiently prepare/review the Form 990, including addressing the following components of the Form 990:</p> <ul style="list-style-type: none"> • Program service activities • Governance issues • Executive compensation • Statement of Revenue (including unrelated business income) • Statement of Functional Expenses • Public support test • Special events • Insider/Related party transactions <p>Additionally, attendees will be able to receive answers to whatever Form 990 questions which they have.</p>

Course Information *continued*

- 9/11-12/2025**
Thursday-Friday
Ridgeland
MSCPA
Governmental Accounting and Auditing Conference
Discussion Leader: Panel
Cost: Members: \$305 **Non-Members:** \$425
Course Hours: 8:30am-4:30pm
Level: Update **CPE Credit:** 16 **VENDOR:** MSCPA **ACRONYM:** GAAC / GAACW
Course objectives and description: This event for government accountants will provide the crucial guidance you need to stay in compliance with the many A&A rules affecting your practice, business or clients. Complete agenda forthcoming. This course qualifies for 16 hours of Yellow Book credit.
- 9/16/2025** **NEW**
Tuesday
Livestream Only: Cybersecurity and Data Protection for CPAs
Discussion Leader: Marc Hamilton
Cost: Members: \$90 **Non-Members:** \$140
Course Hours: 8:30am-10:10pm
Level: Intermediate **CPE Credit:** 2 **VENDOR:** MSCPA **ACRONYM:** CDCPW
Course objectives and description: Protecting sensitive data is essential in today's digital world. This session provides practical strategies to safeguard information and ensure compliance with evolving regulations. Gain a deeper understanding of the tools and practices that reduce risk and keep your organization secure.
- 9/16/2025** **NEW**
Tuesday
Livestream Only: Mastering Microsoft 365 for CPA Efficiency
Discussion Leader: Marc Hamilton
Cost: Members: \$90 **Non-Members:** \$140
Course Hours: 10:20am-12:00pm
Level: Intermediate **CPE Credit:** 2 **VENDOR:** MSCPA **ACRONYM:** MMEW
Course objectives and description: Unleash the full potential of Microsoft 365 to improve collaboration and productivity. This session focuses on using Teams, SharePoint, and Planner to streamline communication and project management. Learn how to create a more connected, efficient workplace in any professional setting.
- 9/16/2025** **NEW**
Tuesday
Livestream Only: Practical Applications for AI in CPA Workflows
Discussion Leader: Marc Hamilton
Cost: Members: \$90 **Non-Members:** \$140
Course Hours: 1:00pm-2:40pm
Level: Intermediate **CPE Credit:** 2 **VENDOR:** MSCPA **ACRONYM:** PAACWW
Course objectives and description: Explore how AI is changing the game for CPAs in diverse roles. This session covers practical tools and strategies for integrating AI into daily tasks, from planning to reporting. Gain insights into how technology can bring greater efficiency and accuracy to your work.
- 9/16/2025** **NEW**
Tuesday
Livestream Only: Internal Controls for Small Organizations
Discussion Leader: Marc Hamilton
Cost: Members: \$90 **Non-Members:** \$140
Course Hours: 2:50pm-4:30pm
Level: Intermediate **CPE Credit:** 2 **VENDOR:** MSCPA **ACRONYM:** ICSSOW
Course objectives and description: Develop practical internal controls tailored to the needs of smaller organizations. This session covers tools and methods to enhance accountability, reduce risks, and improve operational efficiency without overcomplicating processes. Build a scalable framework that fits your organization.
- 9/18/2025**
Thursday
Ridgeland
MSCPA
Health Care Services Conference
Discussion Leader: Panel
Cost: Members: \$215 **Non-Members:** \$215
Course Hours: 8:30am-4:30pm
Level: Update **CPE Credit:** 8 **VENDOR:** MSCPA **ACRONYM:** HCSS / HCSSW
Course objectives and description: This event is designed to meet the specific interests of CPAs and financial professionals who provide services to or works for hospitals, physician practices, and long-term care facilities. Complete agenda forthcoming.
SPECIAL DISCOUNT FOR MEDICAL PROVIDERS: Non CPAs who do not need CPE and work for medical providers can take advantage of a discounted price of \$100. Must call the MSCPA office at 601-856-4244 to register.

9/19/2025 Friday	NEW	Livestream Only: CPA Mock Exam Discussion Leader: N/A Cost: Members: \$0 Non-Members: \$0 Course Hours: 12:00pm-4:00pm Level: CPE Credit: 0 VENDOR: Surgent ACRONYM: MOCEXAM2 Course objectives and description: You are invited to participate in a live 4-hour mock CPA Exam virtual workshop hosted by Mississippi Society of CPAs and Surgent CPA Review to see if you are ready to ace the exam. This unique opportunity will allow you to experience what it is like to sit for any CPA Exam section as you immerse yourself in questions pulled from the actual CPA Exam Blueprints. Plus, you will leave the session with your own personalized ReadySCORE (an accurate measurement of your actual exam score) as well as a detailed report showing your areas of strength and weakness for that section. Individuals taking the Mock CPA Exam may choose any of the six exams to take (from the 3 Core exams or from the 3 Discipline exams).
9/23/2025 Tuesday Ridgeland MSCPA	NEW	Ethics and Professional Conduct Discussion Leader: Donna Ingram Cost: Members: \$165 Non-Members: \$205 Course Hours: 8:30am-12:00pm Level: Update CPE Credit: 4 VENDOR: MSCPA ACRONYM: ERR-5 / ERRW-5 Course objectives and description: This seminar satisfies the State Board's approved ethics covering Mississippi Rules, AICPA Code of Conduct, ethics in your tax practice and ethical behavior.
9/23/2025 Tuesday Ridgeland MSCPA	NEW	Hackers, Hoodlums, and Hot Shots Discussion Leader: Donna Ingram Cost: Members: \$165 Non-Members: \$205 Course Hours: 1:00pm-4:30pm Level: Update CPE Credit: 4 VENDOR: MSCPA ACRONYM: HHHS / HHHSW Course objectives and description: A look at the perpetrators of fraud, their schemes, and ways you can prevent and detect their actions.
9/25/2025 Thursday Ridgeland MSCPA		Not-for-Profit Conference Discussion Leader: Panel Cost: Members: \$125 Non-Members: \$125 Course Hours: 8:30am-4:30pm Level: Update CPE Credit: 8 VENDOR: MSCPA ACRONYM: NPC / NPCW Course objectives and description: Get the industry-specific insights you need to maintain a strong organization for you or your clients and get informed about unique challenges facing not-for-profit organizations at this annual event. Complete agenda forthcoming.
10/11/2025 Saturday-Sunday Miami, Florida Carnival Horizon	NEW	Learn Voyage: CPE at Sea Discussion Leader: Marc Hamilton Guest A & A Speaker: Bruce Nunnally, CPA. Cost: Members: \$950 Non-Members: \$1,050 Course Hours: 20 Level: Intermediate CPE Credit: 20 VENDOR: MSCPA ACRONYM: CPESEA2 Course objectives and description: 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 during this 7-day cruise aboard Carnival departing from Miami, Florida. For complete details, visit: www.learnvoyage.com . SESSION TOPICS: <ul style="list-style-type: none"> • 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
10/22/2025 Wednesday Ridgeland MSCPA		Industry Conference Discussion Leader: Panel Cost: Members: \$225 Non-Members: \$300 Course Hours: 8:30am-4:30pm Level: Update CPE Credit: 8 VENDOR: MSCPA ACRONYM: IND / INDW Course objectives and description: This event is designed to approach critical topics from the perspective of a CFO, controller, manager or accountant from the inside of a business or industry position. Complete agenda forthcoming.

10/27/2025

Monday
Ridgeland
MSCPA

Individual Tax Fundamentals

Discussion Leader: Gordon Meicher

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am-4:30pm

Level: Intermediate **CPE Credit:** 8 **VENDOR:** AICPA **ACRONYM:** TSE.ITF / TSE.ITFW

Course objectives and description: This course provides participants up-to-date information on critical tax issues, giving them an outstanding foundation in the federal tax arena for individuals. Let us help you sort through the maze of tax compliance and tax planning strategies to make sure you are taking advantage of present opportunities and preparing for the future. It is critical that you ensure your clients receive the most current tax planning and tax-saving strategies for their tax plans. Join us for this fast-paced, real-world session and make yourself look like a hero in the eyes of your clients! Course materials include the latest legislative and IRS guidance on the latest key tax topics.

10/28/2025

Tuesday
Ridgeland
MSCPA

Intermediate Individual Taxation

Discussion Leader: Gordon Meicher

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am-4:30pm

Level: Intermediate **CPE Credit:** 8 **VENDOR:** AICPA **ACRONYM:** TSE.IIT / TSE. IITW

Course objectives and description: Congress continues to create uncertainty with its frequent legislative changes. This course will provide clarity to you and your client seeking to keep abreast of tax law changes and the individual and business planning opportunities they provide. Explore, in-depth, the effects of the latest tax legislation, including the American Rescue Plan of 2021, tax court decisions, and IRS guidance on the hottest tax topics affecting individual taxpayers. This course provides a wealth of tax-planning tips and strategies and addresses key tax return issues to arm you with the latest guidance to better serve your new and existing clients.

10/29/2025

Wednesday
Ridgeland
MSCPA

S Corporations: Key Issues, Compliance, and Tax Strategies

Discussion Leader: Gordon Meicher

Cost: Members: \$290 **Non-Members:** \$360

Course Hours: 8:30am-4:30pm

Level: Intermediate **CPE Credit:** 8 **VENDOR:** AICPA **ACRONYM:** TSE.SCF / TSE.SCFW

Course objectives and description: New or existing clients and businesses need assistance with the most misunderstood areas of S Corporations taxation and how they can use them to their advantage. Be prepared to explain the benefits and drawbacks of electing S Corporation status and why more business taxpayers favor the pass-through entity over the C Corporation. This course will give you the knowledge you need to speak effectively to potential business clients and existing shareholders about how you can make the S Corporation business model work for them.

11/5/2025

Wednesday

Livestream Only: Hot Topics of Mgt of Accounting Practice/Firm Administration

Discussion Leader: TBD

Cost: Members: \$40 **Non-Members:** \$40

Course Hours: 11:00am-12:00pm

Level: Advanced **CPE Credit:** 1 **VENDOR:** MSCPA **ACRONYM:** MAPW3

Course objectives and description: Join other managing partners, firm leaders, and firm administrators for this interactive session to discuss hot topics in managing your accounting practice.

11/7/2025 **NEW**

Friday

Livestream Only: K2's Artificial Intelligence Conference

Discussion Leader: Panel

Cost: Members: \$295 **Non-Members:** \$370

Course Hours: 8:30am-4:00pm

Level: Intermediate **CPE Credit:** 8 **VENDOR:** K2 **ACRONYM:** AICW

Course objectives and description: Artificial Intelligence has jumped to the forefront of technology, and perhaps no other technology receives as much attention as AI. Yet, most accounting and financial professionals struggle to take full advantage of the productivity gains that AI can provide. Change that paradigm by participating in K2's Artificial Intelligence Conference!

In this event, you will learn how to get started with the AI tools available today and the risks and benefits associated with AI. Further, you will discover some of the advanced options related to AI, including creating your own AI tools. And importantly, you will learn about various risks associated with using AI and how to mitigate those risks.

If you're seeking to improve your productivity and efficiency with AI – without compromising data security or privacy – this Conference is a “must-see” event!

11/7/2025

Friday
Ridgeland
MSCPA

Accounting Education Conference

Discussion Leader: Panel

Cost: Members: \$100 **Non-Members:** \$100

Course Hours: 8:30am-4:30pm

Level: Update **CPE Credit:** 8 **VENDOR:** MSCPA **ACRONYM:** AES / AESW

Course objectives and description: This annual event updates accounting educators on accounting industry trends and equips them to help their students succeed. Complete agenda forthcoming.

<p>11/10/2025 Monday Ridgeland MSCPA</p>	<p>LLC and Partnership Fundamentals Discussion Leader: William F. (Bill) Taylor Cost: Members: \$290 Non-Members: \$360 Course Hours: 8:30am-4:30pm Level: Basic CPE Credit: 8 VENDOR: AICPA ACRONYM: TSE.TFLP / TSE.TFLPW Course objectives and description: Most U.S. businesses are formed as pass-through entities, which include partnerships. If you are new to the subject or have worked in this area but need a quick review, this course will provide a firm grasp of the fundamental concepts, help you build a strong foundation of knowledge, and freshen up your analytical skills. Talking about tax can sometimes sound like you're speaking a foreign language in front of your clients. You can leverage the tone of the course materials to explain complex</p>
<p>11/11/2025 Thursday Ridgeland MSCPA</p>	<p>Surgent's Top 10 Tax Topics This Year Discussion Leader: William F. (Bill) Taylor Cost: Members: \$290 Non-Members: \$360 Course Hours: 8:30am - 4:30pm Level: Basic CPE Credit: 8 VENDOR: Surgent ACRONYM: TTEN / TTENW Course objectives and description: Join us for our annual expedition through the harbors and swamps on the tax landscape this season. We will uncover the top issues with wide applicability and importance this year and explore the practical implications, potential pitfalls, and planning opportunities. Continually updated for items regarding tax reform.</p>
<p>11/12/2025 NEW Wednesday</p>	<p>Livestream Only: 50 Reasons to Fire a Client Discussion Leader: Jim Martin Cost: Members: \$80 Non-Members: \$120 Course Hours: 12:00pm-1:40pm Level: Basic CPE Credit: 2 VENDOR: Surgent ACRONYM: RFCW Course objectives and description: Relationships with your clients don't work out for a variety of reasons. However, sometimes it can be a refreshing feeling to rid yourself of situations that bog down your firm and your life. This class looks at a multiple of reasons why you should consider saying "You're Fired" to your clients and sample correspondence to do the deed!</p>
<p>11/13/2025 NEW Thursday</p>	<p>Livestream Only: CPA Mock Exam Discussion Leader: N/A Cost: Members: \$0 Non-Members: \$0 Course Hours: 11:00am-3:00pm Level: CPE Credit: 0 VENDOR: Surgent ACRONYM: MOCEXAM3 Course objectives and description: You are invited to participate in a live 4-hour mock CPA Exam virtual workshop hosted by Mississippi Society of CPAs and Surgent CPA Review to see if you are ready to ace the exam. This unique opportunity will allow you to experience what it is like to sit for any CPA Exam section as you immerse yourself in questions pulled from the actual CPA Exam Blueprints. Plus, you will leave the session with your own personalized ReadySCORE (an accurate measurement of your actual exam score) as well as a detailed report showing your areas of strength and weakness for that section. Individuals taking the Mock CPA Exam may choose any of the six exams to take (from the 3 Core exams or from the 3 Discipline exams).</p>
<p>11/20/2025 Thursday Ridgeland MSCPA</p>	<p>Business Valuation and Litigation Services Conference Discussion Leader: Panel Cost: Members: \$225 Non-Members: \$300 Course Hours: 8:30am-4:30pm Level: Update CPE Credit: 8 VENDOR: MSCPA ACRONYM: BVLS / BVLSW Course objectives and description: This specialized event is for CPAs, business valuation specialists, appraisers and other financial professionals who perform business valuation and litigation services. Complete agenda forthcoming.</p>
<p>12/3/2025 NEW Wednesday</p>	<p>Livestream Only: K2's Excel Conference Discussion Leader: Panel Cost: Members: \$295 Non-Members: \$370 Course Hours: 8:30am-4:00pm Level: Intermediate CPE Credit: 8 VENDOR: K2 ACRONYM: EXCELW Course objectives and description: Virtually all accounting and financial professionals use Excel but, unfortunately, most don't use it as efficiently and effectively as they could or should. If you're ready to elevate your Excel skills, plan today to participate in this special 8-hour conference designed to help you work better with Excel. In this event, you will go well beyond simple functions such as SUM to learn how you can take full advantage of many key features in Excel. Included in the discussion are newer functions and features such as LAMBDA, PIVOTBY, and XLOOKUP. You will also learn various tips for improving productivity and security when working with Excel. And you will learn best practices for working with PivotTables. You don't want to miss this special opportunity to learn better ways for working with Excel!</p>

Course Information *continued*

- 12/8-9/2025**
Monday-Tuesday
Flowood
Sheraton Flowood
- Mississippi Tax Institute**
Discussion Leader: Panel
Cost: Members: \$450 **Non-Members:** \$570
Course Hours: 8:30am-4:30pm
Level: Update **CPE Credit:** 16 **VENDOR:** MSCPA **ACRONYM:** MTI / MTIW
Course objectives and description: 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. Complete agenda forthcoming.
- 12/10/2025** **NEW**
Wednesday
- Livestream Only: 2025 Federal and State Income Tax Update for the Local Practitioner**
Discussion Leader: Jim Martin
Cost: Members: \$80 **Non-Members:** \$120
Course Hours: 12:00pm-1:40pm
Level: Update **CPE Credit:** 2 **VENDOR:** Jim Martin, CPA **ACRONYM:** FSITUW-2
Course objectives and description: There is a new sheriff in town! As always, an income tax update that focuses on the normal practitioner's clients. New government legislation presented from the perspective of what the typical tax practitioner needs to know. As an added bonus, changes in the local state rules are covered. Sprinkle in court cases that can apply to a lot of middle to high income taxpayers and you have a review that you can apply to the real world!
- 12/12/2025** **NEW**
Friday
Ridgeland
MSCPA
- Ethics, Rules, and Regulations**
Discussion Leader: William F. (Bill) Taylor
Cost: Members: \$165 **Non-Members:** \$205
Course Hours: 8:30am-12:00pm
Level: Update **CPE Credit:** 4 **VENDOR:** MSCPA **ACRONYM:** ERR-6 / ERRW-6
Course objectives and description: This seminar satisfies the State Board's requirement for three hours of general ethics and one hour of Mississippi Rules and Regulations.
- 12/12/2025**
Friday
Ridgeland
MSCPA
- Reviewing Individual Tax Returns**
Discussion Leader: William F. (Bill) Taylor
Cost: Members: \$165 **Non-Members:** \$205
Course Hours: 1:00pm-4:30pm
Level: Intermediate **CPE Credit:** 4 **VENDOR:** AICPA **ACRONYM:** CL4ITRM / CL4ITRMW
Course objectives and description: The sheer mass of Internal Revenue Code provisions affecting individual taxpayers presents a considerable challenge for CPAs and tax professionals. These provisions combined with the potential for input error when utilizing the array of income tax software available, create the potential for a multitude of errors that can occur when preparing your client's tax return. Join us as we discuss the common errors practitioners make on individual tax returns that are often missed by review staff. Sharpen your reviewing skills by examining case studies discussing issues for which additional information from the client may be warranted, and areas of tax law that require additional analysis and information.
- 12/16/2025**
Tuesday
Ridgeland
MSCPA
- AICPA's Annual Federal Tax Update**
Discussion Leader: TBD
Cost: Members: \$290 **Non-Members:** \$360
Course Hours: 8:30am-4:30pm
Level: Update **CPE Credit:** 8 **VENDOR:** AICPA **ACRONYM:** PTU / PTUW
Course objectives and description: Save time and keep current on the latest tax developments! This comprehensive course covers all legislative, judicial, and IRS developments of the past year with a focus on implementation and compliance. Discover how to effectively and confidently complete tax planning and compliance engagements. Cover current developments affecting individuals (including those regarding income, deductions and losses, tax calculations, individual credits, filing matters), business entities (including those regarding S Corporations and their shareholders, C Corporations, partnerships), estates and trusts, retirement plans, and more.
- 12/19/2025**
Friday
Ridgeland
MSCPA
- Reviewing Partnership Tax Returns**
Discussion Leader: William F. (Bill) Taylor
Cost: Members: \$165 **Non-Members:** \$205
Course Hours: 8:30am-12:00pm
Level: Intermediate **CPE Credit:** 4 **VENDOR:** AICPA **ACRONYM:** CL4PTRM / CL4PTRMW
Course objectives and description: The partnership section of the Internal Revenue Code is arguably one of the most difficult sections to comprehend. That complexity, and the reliability of tax software to properly handle it, can create many issues for you and your staff when processing your client's LLC and partnership tax returns. Join us as we discuss the common errors practitioners make on partnership tax returns that are often missed by review staff. The intent is to sharpen skills for reviewers by examining case studies and discussing issues where additional information from the client may be warranted and areas of tax law where proper treatment requires additional analysis and information. Multiple issues will be discussed including income, deductions, K-1 reporting, and more! This course follows a highly illustrative case study format to increase participant comprehension and retention.

12/19/2025Friday
Ridgeland
MSCPA**Reviewing S Corporation Tax Returns: What are you Missing?****Discussion Leader:** William F. (Bill) Taylor**Cost: Members:** \$165 **Non-Members:** \$205**Course Hours:** 1:00pm-4:30pm**Level:** Intermediate **CPE Credit:** 4 **VENDOR:** AICPA **ACRONYM:** CL4STRM / CL4STRMW

Course objectives and description: In this course, we discuss the common errors practitioners make on S corporation tax returns that review staff often miss. The intent is to sharpen reviewers' skills by examining four case studies and discussing issues where additional information from the client may be warranted and areas of tax law where proper treatment requires additional analysis and information. Matters addressed include income, deductions, K-1 reporting, and K-2 and K-3 reporting. This course follows a highly illustrative case study format to increase participant comprehension and retention.

5/10/2026 NEWSunday-Sunday
Miami, FL
Carnival Celebration**Learn Voyage: CPE at Sea****Discussion Leader:** Marc Hamilton **Guest A & A Speaker:** Michael Brand**Cost: Members:** \$950 **Non-Members:** \$1,050**Course Hours:** 20**Level:** Intermediate **CPE Credit:** 20 **VENDOR:** MSCPA **ACRONYM:** CPESSEA

Course objectives and description: 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 during this 7-day cruise aboard Carnival departing from Miami Florida. For complete details, visit: www.learnvoyage.com.

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

Member Benefits & Discounts

As a member of the statewide organization for CPAs in Mississippi, you have access to an array of member benefits including discounts on quality CPE, as well as many networking and leadership opportunities to help you make the most of your career.

POWERFUL CONNECTIONS

- **Member Directory** to keep in touch with other members through this searchable online directory
- **Young CPA Network** to meet members who are in the beginning stages of their careers through social and professional development events
- **Committees and Task Forces** to share your expertise, exercise your leadership skills and grow your knowledge base
- **Volunteer Opportunities** offering meaningful ways to share your time and expertise with Society-sponsored public service programs
- **Chapters** offering local education and networking opportunities
- **Find a CPA Directory** to reach new clients by listing yourself in this free directory

PERTINENT INFORMATION

- The **MSCPA Newsletter** mailed to all members 10 times per year
- **Career Center** to view current job listings or post an opening for a position at your firm or company



PROACTIVE ADVOCACY

- **National Representation:** Our member network of key-person contacts, MSCPA leadership, and the Legislation Committee allow us to maintain relationships with our Congressional delegation and national associations to address the needs of our members and the profession and to fight for initiatives, improvements, and relief.
- **State Representation:** Through our non-partisan Political Action Committee comprised of CPAs who uphold the political voice of the CPA profession, member support gives us the ability to better achieve our annual state legislative agendas and to support CPA and business interests in our lobbying activities. MSCPA closely monitors legislation and state agency proposals to determine their impact upon the profession. Acting as our liaison, the Taxation Committee meets regularly with the Mississippi Department of Revenue. MSCPA members are encouraged to submit topics and problems for consideration. The liaison group discusses, reviews, and suggests possible solutions to these problems.

PREMIER EDUCATION

- **Member-Only Discounts** on education courses, conferences, and webinars
- **Extensive Catalog** of innovative education programs that prepare members for the future
- **My CPE** automatically records MSCPA CPE courses you have taken and allows you to input other CPE courses to aid in reporting

POLICIES & GENERAL INFORMATION

EDUCATION POLICIES

Continuing Education with MSCPA provides a comprehensive learning plan to help develop and grow professionally. We strive to provide superb customer service and innovative continuing education for MSCPA members and others associated with MSCPA. MSCPA is registered with the Mississippi State Board of Public Accountancy as a sponsor of continuing professional education.

PRICING

The member rate is available to MSCPA members (membership is on an individual basis—not through one’s firm). CPAs who are not members of the MSCPA may register by paying the non-member rate.

COURSE MATERIALS

Upon course registration, in-person registrants are asked if they prefer to have a printed manual in addition to the e-materials. Links to the e-materials will be listed with your course registrations in your account on the MSCPA website seven calendar days before the course. You will receive an e-mail when the materials are available. If you request printed materials upon registration, it will be available for pick up at the registration desk on the date of the class. **Printed materials are not available for conferences.** It is your responsibility to maintain a current e-mail address with the MSCPA.

EVENT CONFIRMATIONS

You will receive an email confirmation for all MSCPA event registrations. Please review your confirmation for accuracy and any special instructions. When registering online, course confirmations are emailed immediately following online registrations. If you do not receive an email confirmation immediately, your registration was not successful. When registering by mail or fax, a confirmation will be sent via email when your registration has been successfully processed. In the event that your confirmation is not received within 2-3 days, please contact our office.

COURSE CANCELLATIONS BY MSCPA

Courses may be cancelled by MSCPA one week prior to the course date if they fail to meet the minimum attendance requirement. In the event of a cancellation, you will be notified and given the option of transferring to another course or receiving a full refund.

EVALUATIONS

Once a course is completed you will have access to a link for the course evaluation. We encourage you to complete the evaluation as this helps us be more efficient in providing quality speakers and materials.

TRANSFERS, CANCELLATIONS, SUBSTITUTIONS AND REFUNDS

More than seven calendar days before the course you may either transfer to another course, transfer the amount paid to money on account, or receive a full refund. You may also substitute your registration to another member. Less than seven calendar days before the course you may substitute another member without penalty, transfer 50% of the amount paid to another course or to money on account, or receive a 50% refund of the amount paid. Cancellations made the day of the event forfeit the entire registration fee.

PARTNER WEBINAR AND WEBCAST CANCELLATION POLICIES

Cancellations made one business day prior to the event or after will forfeit the entire registration fee.

SPECIAL ACCOMMODATIONS

In accordance with the American Disabilities Act (ADA), MSCPA will try to reasonably accommodate anyone disabled and in need of special services. If registering by fax or mail, please indicate on the registration form that you require special services. If registering online, please contact our office. Please call our office if you have special dietary requirements.

DRESS RECOMMENDATIONS

Participants may want to wear layered clothing to allow for comfort throughout the day, as the temperature in the meeting room fluctuates.

MY CPE TRACKER

You may view your CPE tracker online at www.ms-cpa.org. Once logged into the website, click CPE > My CPE > CPE History & Transcript to view all courses taken with the MSCPA. You will also have the option to add courses not taken with the MSCPA in order to have a complete transcript of your CPE for the year.

EXAMPLE

The screenshot displays the 'MY ACCOUNT' and 'MY LEARNING' sections of the MSCPA website. The 'MY ACCOUNT' section includes links for Account Settings, My Orders, My Memberships & Subscriptions, My On-Demand, and CPE History & Transcript. The 'MY LEARNING' section includes links for Upcoming CPE & Events and My On-Demand. Below these sections, there is a 'Filter By' section with dropdown menus for Date Range (All Time), Registration Format (All Registration Formats), Source (All Sources), and Field of Study (All Fields of Study). Below the filters, there is a 'Showing 2 CPE Credits' section with a search bar and buttons for '+ Add CPE', 'Search CPE History', 'Print', 'PDF', and 'CSV'. A table of CPE credits is shown below, with columns for COURSE, DATE, and CPE. The table contains one entry: 'Tax Update' on '2/12/2025' for '2.00 Accounting'. A 'Download Certificate' button is visible next to the entry. A 'LIVESTREAM' button is also present below the table. A note at the top of the page states: 'Courses purchased through MSCPA are automatically added here after event conclusion. You may also add certificates for courses you've purchased through MSCPA. Self-added CPE records are not verified by MSCPA. To prevent duplicates, please do not self-add MSCPA CPE certificates to your history.' A second note states: 'This page is a resource you may use to maintain a record of completed CPE. Individuals are responsible for reporting compliance with CPE requirements at the time of license renewal. Please note; MSCPA does not share this information with any regulatory body or state agency.'

Online registration is easy! Login and register for all your classes online by visiting www.ms-cpa.org/education/cpe-catalog.

Personal Information Check here for a change of address

First _____ MI _____ Last _____

MSCPAs Member Number _____

Firm/Company _____

 Preferred Address Home Business

City _____ State _____ ZIP _____

Phone _____

Email Address (for registration confirmation) _____

Membership Information

 Are you a MSCPAs Member? Yes No Join
 Are you a CPA? Yes No

Payment Information
 Check (Make payable to MSCPAs)

 Credit Card: Visa Mastercard Discover Am Express

Card Number _____

Expiration Date _____ Security Code (required to complete transaction) _____

Signature _____

Name as it appears on card _____

 Company credit card Personal credit card

Special Needs
 Check here if you require special services, including dietary restrictions. Please notify MSCPAs in advance of your needs by contacting Lydia Carlisle at lcarlisle@ms-cpa.org, 601-856-4244.

Course Selection

Course Information			In-Person Only			
Course Date	Course Title	Course Code	Printed Materials Y/N	MSCPAs Member Fee	Non-Member Fee	Subtotal

Total \$ _____

Course Materials: Upon course registration, in-person registrants are asked if they prefer to have a printed manual in addition to the e-materials. Links to the e-materials will be listed with your course registrations in your account on the MSCPAs website seven calendar days before the course. You will receive an e-mail when the materials are available. If you request printed materials upon registration, it will be available for pick up at the registration desk on the date of the class. **Printed materials are not available for conferences.**

If you have not received an email confirmation two business days prior to the course date, please contact the Society office at 601-856-4244. You may fax your completed registration form to 601-856-8255 or mail it to MSCPAs, 306 Southampton Row, Ridgeland, MS 39157.

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REGISTER FOR CPE

ONLINE

www.ms-cpa.org/CPE/catalog/events

FAX

(601) 856-8255

MAIL

Mail your registration form with credit card information or check made payable to:

MSCPA

306 Southampton Row
Ridgeland, MS 39157

SCAN QR CODE:

