





### ZOOM HINTS





### To mute and unmute:

- Click the microphone icon in the toolbar at the bottom of your Zoom window
- OR on a PC press Alt + A, on a Mac press shift + command + A
- OR on a telephone press \*6

### To submit questions:

• Click the Chat icon in the toolbar at the bottom of your Zoom window





### TODAY'S DISCUSSION



- 1. WELCOME TO TXCPA
- 2. MEMBERSHIP
- 3. CHAPTERS
- 4. OPPORTUNITIES FOR FUTURE CPAS
- 5. LEARNING OPPORTUNITIES
- 6. VOLUNTEER OPPORTUNITIES
- 7. ADVOCACY
- 8. PEER ASSISTANCE
- 9. CLOSING AND Q&A

# 



### TXCPA

### WELCOME TO TXCPA

Melinda Bentley, CAE Chief Operating Officer





### WHO WE ARE

- Nonprofit, voluntary, professional organization representing Texas CPAs in public practice, business & industry, government, and education
- TXCPA was created in 1915 and held its first meeting in Fort Worth with 16 founding members
- Today, we have 28,000 members across 20 local chapters
- One of the largest in-state memberships of any state CPA society in the United States



## TXCPA 2020-2024 STRATEGIC PLAN



### VISION

Empower members to lead and succeed.

### MISSION

The Texas Society of CPAs exists to support its members in their professional endeavors and to promote the value and high standards of Texas CPAs.

### **GUIDING PRINCIPLES**



**LEVERAGE & LEAD TECHNOLOGY** 



**FOSTER INCLUSIVE LEADERS** 



**ORGANIZATIONAL FLEXIBILITY** 



**CONNECTING MEMBERS & RESOURCES** 

#### **OUR COMMITMENT TO DIVERSITY, EQUITY, INCLUSION AND BELONGING**

TXCPA values the diverse contributions and talents of all its members. We are committed to promoting diversity, equity, inclusion and a sense of belonging in the workplace, in membership and in the accounting profession. Diversity includes, but is not limited to, race, gender, generations, abilities, orientation, and religious beliefs.



### **COMMUNITY & CONNECTION**

Provide members with opportunities and resources to connect, serve and lead.



### PROFESSIONAL EXCELLENCE

Provide resources to assist members in the achievement of professional and personal success.



#### **ADVOCACY**

Be the voice of our members before public policy makers and the public.



### TXCPA 2020-2024 STRATEGIC PLAN



### STRATEGIC DESTINATION

We are a unified, influential, and adaptive association driven by technology to deliver customized value and service to the evolving accounting profession.

### **GOAL 1: GOVERNANCE**

Organize the Society's governance and chapter affiliations to design an adaptable and unified structure that will act as a catalyst for growth and strengthening operations

### **GOAL 2: TECHNOLOGY**

Acquire or leverage technology platforms to customize and expand delivery of education and member value

### **GOAL 3: GROWTH**

Broaden member categories to reflect evolving profession and identify complementary organizations to partner or affiliate with for expanded service capabilities



### TXCPA

### MEMBERSHIP

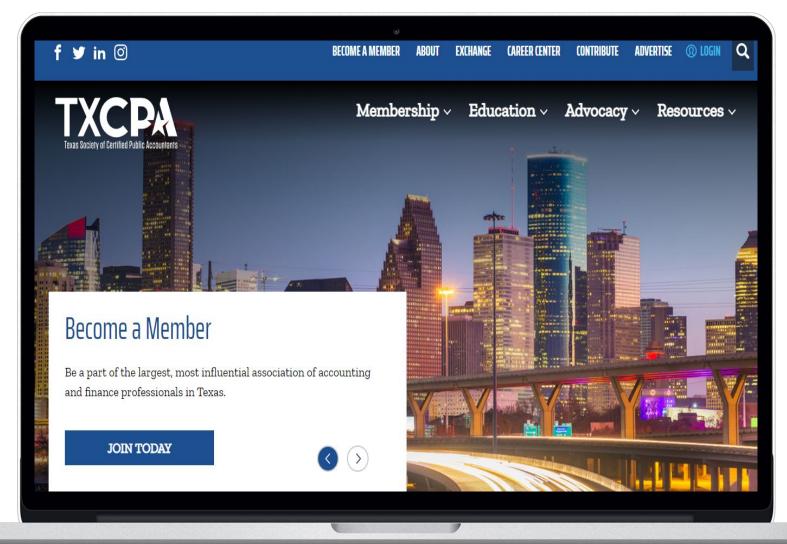
Kristie Estrada

Manager, Membership Operations and Acquisition





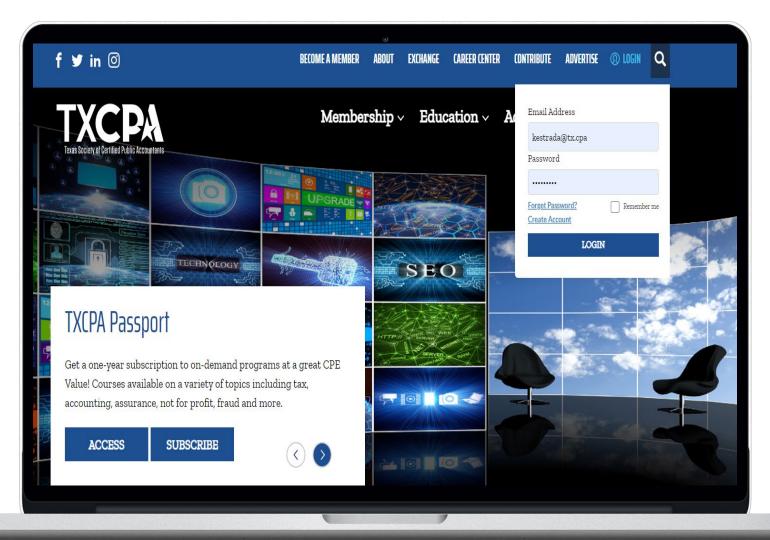
### YOUR ONLINE HOME - TX.CPA







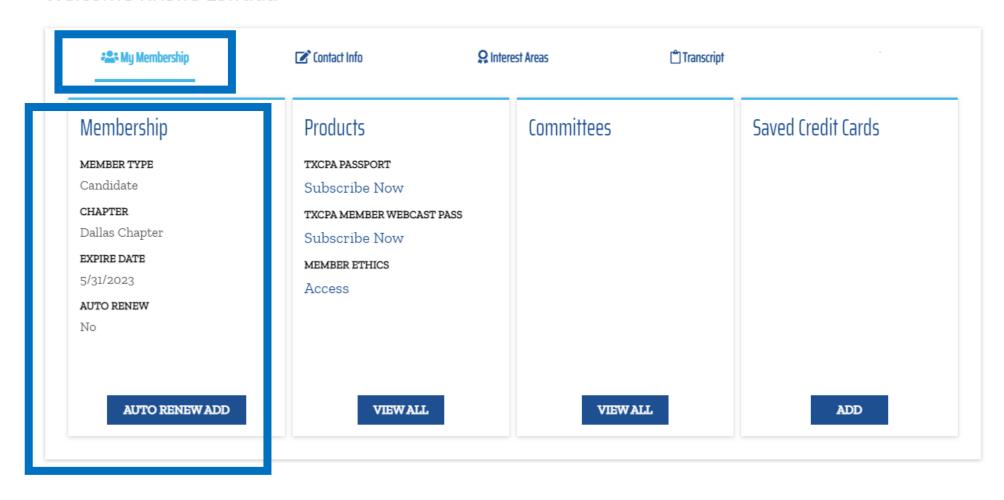
### ACCESSING YOUR MEMBER PROFILE







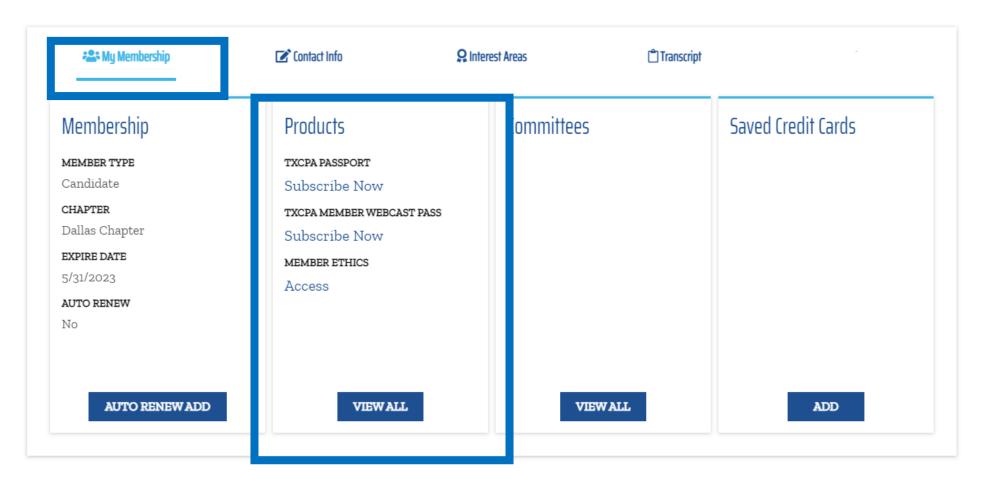
### YOUR ONLINE PROFILE - MY MEMBERSHIP







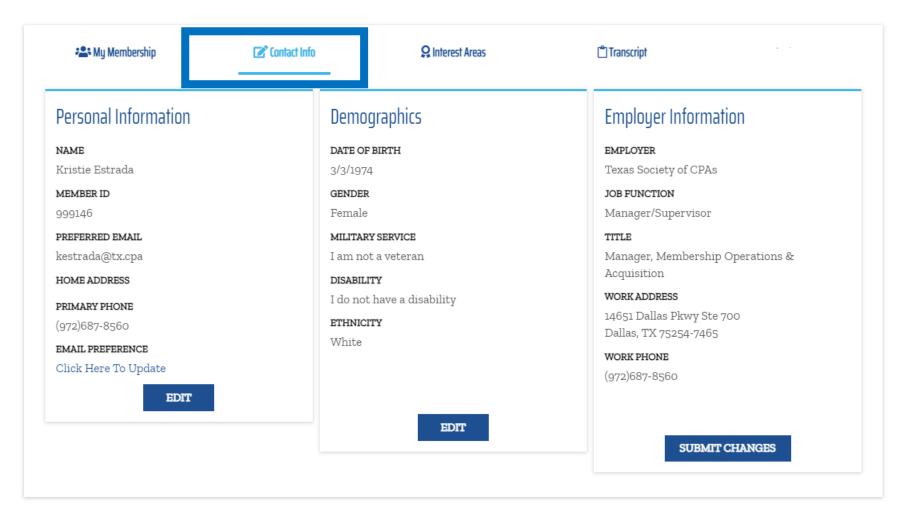
### YOUR ONLINE PROFILE - PRODUCTS







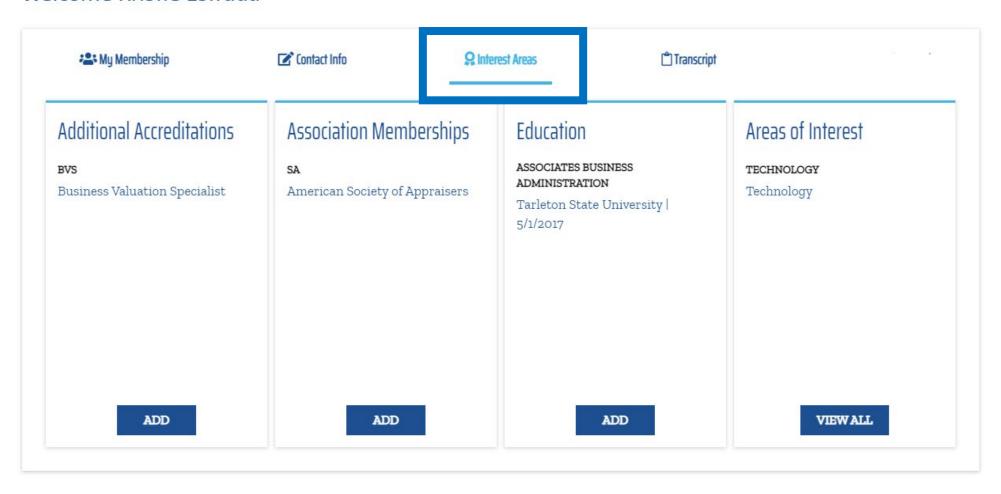
### YOUR ONLINE PROFILE - CONTACT INFORMATION







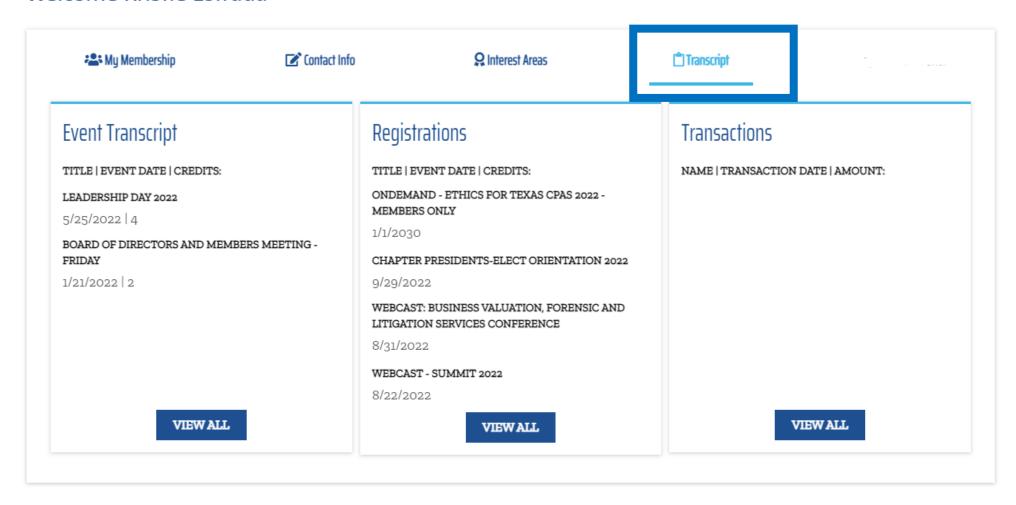
### YOUR ONLINE PROFILE - INTEREST AREAS







### YOUR ONLINE PROFILE - TRANSCRIPTS





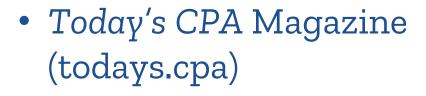


### TXCPA PUBLICATIONS



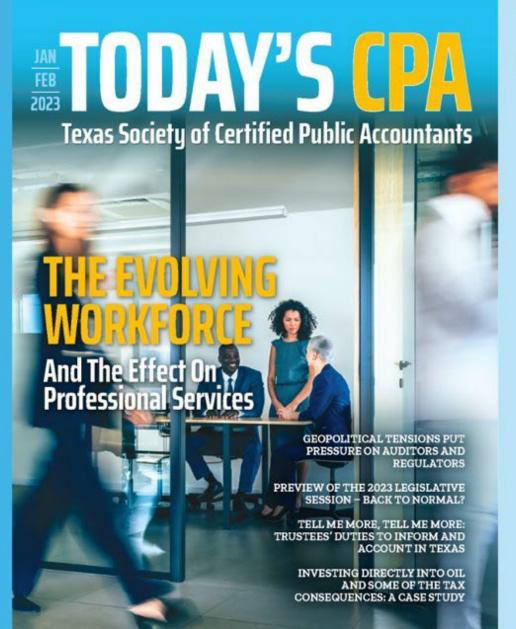
Read the latest issue online

The IRS in 2022: A Work in Progress



- TXCPA Accounting Industry Outlook
- Viewpoint

### NEW ISSUE NOW AVAILABLE ONLINE!



### The January/February issue is now available! Read these articles and more:

- The Evolving Workforce and the Effect on Professional Services
- Tell Me More: Trustees' Duties to Inform and Account in Texas
- Geopolitical Tensions Put Pressure on Auditors and Regulators
- Preview of the 2023 Legislative Session
- Investing Directly Into Oil and Some of the Tax Consequences
- · And more!

WWW.TODAYS.CPA



### TXCPA EXCHANGE

### CONNECT. ENGAGE. SHARE. CONVERSE.

# Join the conversation on TXCPA Exchange!

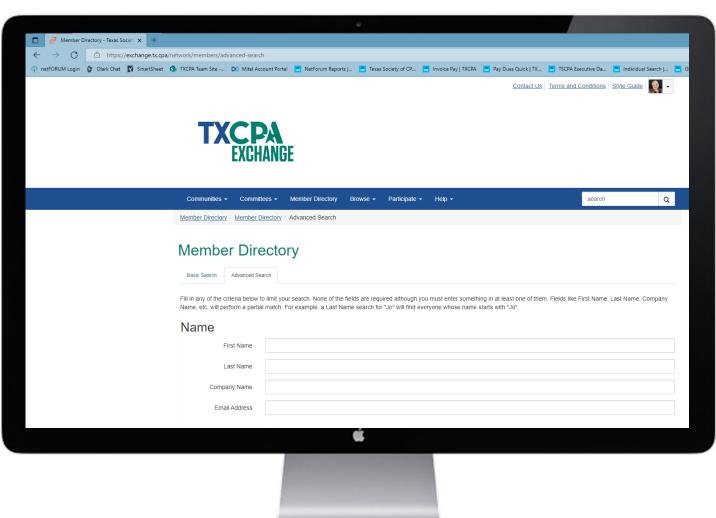
Leverage the knowledge of 28,000 fellow TXCPA members by visiting **exchange.tx.cpa** 

- Find and connect with members through the member directory
- Participate in discussions, ask questions and get feedback from colleagues
- Share knowledge and resources with your fellow CPA community





### MEMBER DIRECTORY

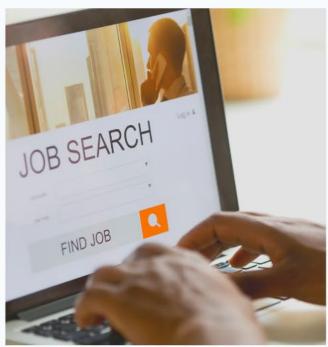




### TXCPA CAREER CENTER:

Your go-to resource to find or post a job







TXCPA's online Career Center can assist you in searching for a new job or hiring just the right candidate. Members can create a FREE job seeker profile, and receive exclusive savings on postings. If it's time to make a career move or you have a job opening, visit the Career Center at **careers.tx.cpa.** 

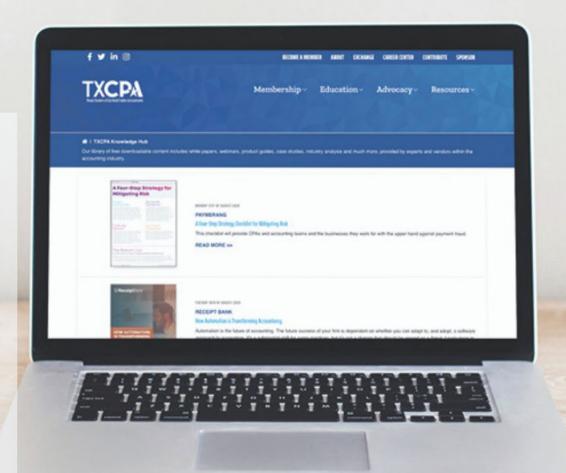


### **Knowledge Hub**



txcpahub.org

The brand new TXCPA Knowledge Hub is a library of free downloadable content, including white papers, product guides, case studies, industry analysis and much more, provided by experts and vendors within the accounting profession.







### TXCPA

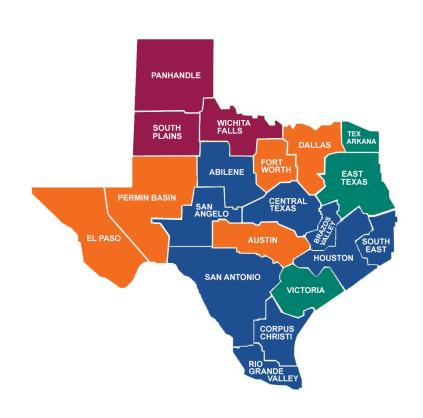
### CHAPTERS

Rori Shaw, CAE
Manager, Chapter Operations





### TXCPA CHAPTERS



- Connect locally with colleagues and your community through one of 20 local chapters.
- Chapters are automatically assigned based on your primary business address unless otherwise requested.
- Attend a CPE event, network at a chapter meeting, or volunteer as a chapter leader.





### TXCPA CHAPTERS

- Chapter Board of Directors
- Chapter Level Committees
- Career Presentations/School Visits
- Content Contributors
- Community Service
- CPE Event
- Networking Event
- Speakers for Events/Broadcasts







### TXCPA CHAPTERS

Abilene Chapter

TXCPAAbilene.cpa

Executive Director: Lana Zullo

**Austin Chapter** 

cpascount.org

Executive Director: Diane Joiner

**Brazos Valley Chapter** 

TXCPABV.cpa

**Executive Director:** Hayley Tuggle

Corpus Christi Chapter

TXCPACC.cpa

Executive Director: Linda Messing

**Central Texas Chapter** 

TXCPACT.cpa

Executive Director: Rebekah North

**Dallas Chapter** 

cpadallas.org

**Executive Director**: Margaret L. Campbell

East Texas Chapter

TXCPAET.cpa

**Executive Director:** Rori Shaw

El Paso Chapter

TXCPAElPaso.cpa

Executive Director: Beverly Longoria

Fort Worth Chapter

Website: TXCPAFW.cpa

**Executive Director:** Jennifer Davis

**Houston Chapter** 

TXCPAHouston.cpa

**Executive Director:** Mark Allen

Panhandle Chapter

TXCPAPanhandle.cpa

Executive Director: Greg Ogburn

**Permian Basin Chapter** 

TXCPAPB.cpa

Executive Director: Rori Shaw

Rio Grande Valley Chapter

riochaptercpa.com

**Executive Director:** Katharine Martin

San Angelo Chapter

TXCPASanAngelo.cpa

Executive Director: Deborah Arledge

San Antonio Chapter

TXCPASA.cpa

Executive Director: Jacqui Belcher

**South Plains Chapter** 

TXCPASouthPlains.cpa

**Executive Director:** Amy James

Southeast Texas Chapter

TXCPAST.cpa

**Executive Director**: Rhonda Ledbetter

Texarkana Chapter

TXCPATexarkana.cpa

**Executive Director:** Kelly J. Birdwell

Victoria Chapter

TXCPAVictoria.cpa

**Executive Director:** Linda Messing

Wichita Falls Chapter

TXCPAWF.cpa

**Executive Director:** Randy Holley



### TXCPA

### OPPORTUNITIES FOR FUTURE CPAS

**Emily Stupnik** 

Student and School Engagement Coordinator





### STUDENT AND CANDIDATE MEMBERSHIP

### Students:

- Free
- Ambassador opportunities
- Eligible until graduation

### Candidates:

- \$125
- Eligible for five years after graduation

### **BENEFITS**

- Access to TXCPA Exchange member directory and forum
- Chapter membership local networking and service opportunities
- Scholarship opportunities
- Member communications
- Free job seeker profile on the TXCPA Career Center
- Access to internship postings
- Leadership training opportunities
- Discounts on CPA Exam prep
- Information/resources/events to guide you to the CPA





### CPA PIPELINE PRIORITIES - 2022/2023

**Advancing Legislative and Regulatory Changes** 

Reducing the Financial Burden of Becoming a CPA

**Increasing Outreach and Visibility** 

**Expanding Current Resources** 







### NEW MATERIALS AVAILABLE!



Accountants are the backbone of the business world. Every possible industry 🕕 needs accountants to keep their finances in check – including nonprofits, government agencies and public accounting firms.

ust like doctors or lawyers, there are lots of different types of accountants and ways to make a diff To matter your interests, there's a job for you in accounting! Here are just a few specialty areas

- Technology Whether it's IT, data analytics or cybersecurity, you can make sure clients and understand their risks and opportunities in a rapidly changing digital business world.
- Entertainment Advise celebrities on their financials, negotiate contracts, and help keep TV shows



keep food and fashion

### La contabilidad puede llevarte a cualquier parte Ábrete a una carrera llena de oportunidades

#### OUÉ ES UN CONTADOR?

os contadores son la columna vertebral del mundo empresarial. Todos los ectores posibles necesitan contadores para mantener sus finanzas baio control. ncluidas las organizaciones sin ánimo de lucro, las agencias gubernamentales y as empresas de contaduría pública.

### ;DÓNDE TRABAJAN LOS CONTADORES?

al igual que los médicos o los abogados, existen muchos tipos de contadores y formas de hacer la

- Tecnología: va sea en las tecnologías de la información, análisis de datos o ciberseguridad, puedes asegurarte de que los clientes y las empresas comprendan sus riesgos y oportunidades en un mundo empresarial digital que cambia rápidamente.
- Entretenimiento: asesora a los famosos sobre sus finanzas, negocia contratos y ayuda a mantener los programas de televisión, los conciertos y los videojuegos dentro del presupuesto
- Organizaciones sin ánimo de lucro: recibe un salario por hacer buenas obras y asegúrate de que las organizaciones sin ánimo de lucro no gasten más dinero del que obtienen.
- Gobierno: ayuda a mantener la honestidad de los departamentos del gobierno local, estatal y nacional, asegurándote de que estos organismos sean fiscalmente responsables con el dinero
- Alimentación y moda: ayuda a tomar decisiones sobre los productos, las tiendas y los precios para que
- las industrias de la alimentación y la moda sigan siendo rentables.

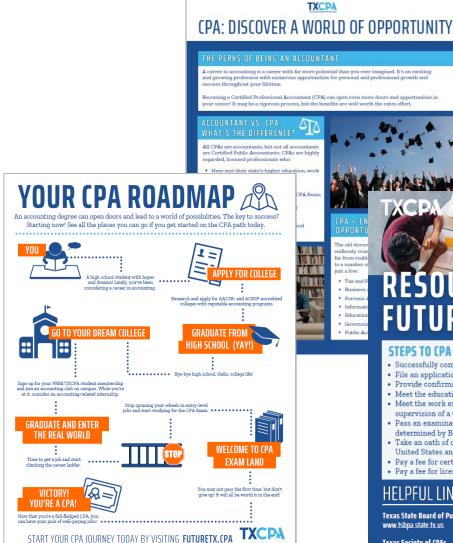
  Deportes: ayuda a los atletas profesionales y a los equipos deportivos con sus necesidades financieras ediante el análisis de las implicaciones financieras de la contratación de un nuevo jugador, la fijación de precios de los palcos y la negociación de contratos.
- Investigación criminal: trabaja en investigaciones criminales para atrapar a las personas que cometen fraudes v otros delitos financieros
- Público: trabaja en una empresa de contaduría pública como asesor financiero para una variedad



#### Conocedor de la tecnología

- Sentido ético
- Adaptable
- Profesional
- Curioso/inquisitivo Analítico
- · Orientado al detalle Estratégico





### A career in accounting is a career with far more potential than you ever imagined. It's an exciting oming a Certified Professional Accountant (CPA) can open even more doors and opportunities in ser! It may be a rigorous process, but the benefits are well worth the extra effor re Certified Public Accountants. CPAs are highly

#### STEPS TO CPA GREATNESS

- · Successfully complete the CPA Exam
- · File an application for issuance of the CPA certificate
- Provide confirmation of good moral character
- · Meet the education requirements (150 hours or more of college credit) · Meet the work experience requirements (one year experience under the supervision of a CPA)
- · Pass an examination on the Rules of Professional Conduct as determined by Board rule
- . Take an oath of office to support the laws and Constitution of the United States and this state and rules adopted by the Board
- Pay a fee for certification
- · Pay a fee for licensing

#### **HELPFUL LINKS:**

Texas State Board of Public Accountancy www.tsbpa.state.tx.us

Texas Society of CPAs www.futuretx.cpa

www.prometric.com/test-takers/search/cpa

www.nasba.org

www.thiswaytocpa.com







### **MOCK CPA EXAM**

March 24, 2023 | 1 to 5 p.m. CT | Virtual

Are you truly ready to pass the CPA Exam? Have you studied enough? Are you focusing on the right material? There's only one way to find out – give it a try!

Registration deadline: March 21, 2023

Learn more and register:

bit.ly/TXMockCPA





### TXCPA

### LEARNING OPPORTUNITIES

**Anice Asberry** 

Manager, Learning





### TXCPA LEARNING OPPORTUNITIES





Search the entire library of educational topics provided by TXCPA, including upcoming events, the latest news, content, and resources.



#### **IN PERSON**

Attend a conference or seminar to gain additional knowledge and have an opportunity to network with other professionals face to face.



#### **ONLINE LEARNING**

Through TXCPA's online learning platform you can stay on top of your required hours, check out new topics to expand your skillset and be in control of what and how you learn. Take advantage of the online learning bundles for additional savings.



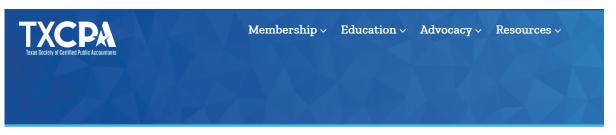
#### **CPE ONSITE TRAINING**

TXCPA has partnered with the American Institute of CPAs in order to bring high quality training to you. We offer a materials only or a turnkey presentation method to help meet the needs of your business.





### FREE CPE FOR MEMBERS



Homepage ▶ Education ▶ Free CPE for Members

#### Free CPE for Members

Your membership includes at least 20 hours of FREE CPE! Read on for details about upcoming complimentary courses available to TXCPA members. Additional courses will be added throughout the year, so check back often and stay tuned to your TXCPA members communications.

#### Texas Taxes: 2022 Quarterly Updates

These free one-hour webcasts help you stay on the cutting edge of Texas tax developments. Hear from speakers who try Texas franchise and sales tax cases in state court. Learn about the significant changes in Texas taxes that may affect you and your clients.

- October 3, 2022
- January 12, 2023

#### Professional Issues Update

FREE CPE Webcast for Members CPE Hours: 2

This popular complimentary offering helps members stay on top of the latest issues facing accounting professionals and the clients and companies they serve – all conveniently accessed online. Check back to register. Upcoming schedule:



EDUCATION
Find CPE

Transcript

**Group Sales** 

Be a Sponsor Be a Speaker

**Certificate Programs** 

**Free CPE for Members** 

Ethics CPE for Texas CPAs
Online Learning
Passport

• 4-hour TSBPA approved ethics

Timely professional updates

- At least 20 hours
- 4-hour TSBF



# FREE Ethics Course with Your TXCPA Membership!



- It's easier than ever to meet your ethics requirement for licensing!
- Members have access to a FREE, online, on-demand, TSBPA-approved ethics course as a benefit of their TXCPA membership
- Course is valid with membership renewal
- Visit tx.cpa for more information

Add a little bit of body text





### ACCESS YOUR FREE ETHICS COURSE



- Go to tx.cpa
- Sign in with your email address and password
- Go to Products/ Members Ethics, click on the highlighted word Access, and the TXCPA course will start
- Once you finish the video, go to your right upper corner, click on the word Certificate to compete the course evaluation and take the required quiz.



### VOLUNTEER OPPORTUNITIES

Melinda Bentley, CAE Chief Operating Officer



Volunteers are the of TXCPA!

Learn more about committee service, speaking opportunities and more!



#### VOLUNTEER OPPORTUNITIES

- More than 35 volunteer committees
- Call for volunteers closed February 15, but we invite any interested in serving to let us know. Service is June 1, 2023 –May 31, 2024.
- Learn more at <u>tx.cpa/membership/get-involved</u>

Questions?

Holly McCauley – <a href="mailto:hmccauley@tx.cpa">hmccauley@tx.cpa</a>



### **ADVOCACY**

Kenneth Besserman, JD

Director, Government Affairs and Special Counsel





### ADVOCACY



- TXCPA is focused on protecting your license and advocating for the importance and protection of the CPA license and the accounting profession before the Texas Legislature.
- Member committees like the Professionals Standards Committee, Federal Tax Policy Committee, and State Tax Committee work on your behalf to review and respond to proposed changes in the profession.
- TXCPA's Legislative Advisory Committee and the TXCPA PAC help the society to develop our legislative agenda and cultivate legislative relationships.



#### TXCPA 2023 LEGISLATIVE AGENDA

- 120 hours to Test Legislation Allowing testing to begin at 120 hours will give students more flexibility in the path to 150 hours for certification
  - SB 159 (Perry) and HB 797 (Button)
- **Fifth year scholarship bill** Expand the TSBPA 5th year scholarship program to make scholarship funds available to more accounting students. Funds will be available to those students that have completed at least 15 hours of upper-level accounting courses. This legislation is an important piece of TXCPA's pipeline initiative.
  - SB 951 (Perry) and KB 2504 (Button)
- Sales Tax on Professional Services TXCPA opposes sales taxes on professional services.
- **Proper Regulatory Oversight of the CPA License** TXCPA will defend against any legislation that in any way limits, diminishes or affects the importance and rigor of the CPA license.
- **Monitoring Tax Legislation** TXCPA will monitor, review and analyze all tax legislation (tax proposals, property tax, tax deadlines, new/repealed taxes) to ensure that all issues and concerns that are vital to the accounting profession are addressed.



### WHAT YOU CAN DO

### **Key Person Program**

- Cultivate Relationships
- Meet with Legislators
- Offer support
- Be an advocate for the Society and the profession





### TXCPA CPA-PAC

- TXCPA's **CPA-PAC** contributes funds to political candidates and incumbents who understand the importance of a sound Texas economy and the critical role CPAs play in preserving the state's business climate
- CPA-PAC generally supports friendly incumbents and those that are supportive of the accounting profession
- Campaign contributions demonstrate a commitment to candidates/officeholders and the importance of the accounting profession and the CPA license to the Texas economy and business climate
- CPA-PAC currently evaluating candidates and beginning to present check as the campaign season is heating up





### Protect your CPA license with a

## PAC DONATION

It's the fastest, simplest, most efficient way to get involved in the political process and its positive effects on our profession.

Donations support policymakers who understand the high ethical, technical and professional standards of the accounting profession.

Learn more and contribute online at bit.ly/txcpapac





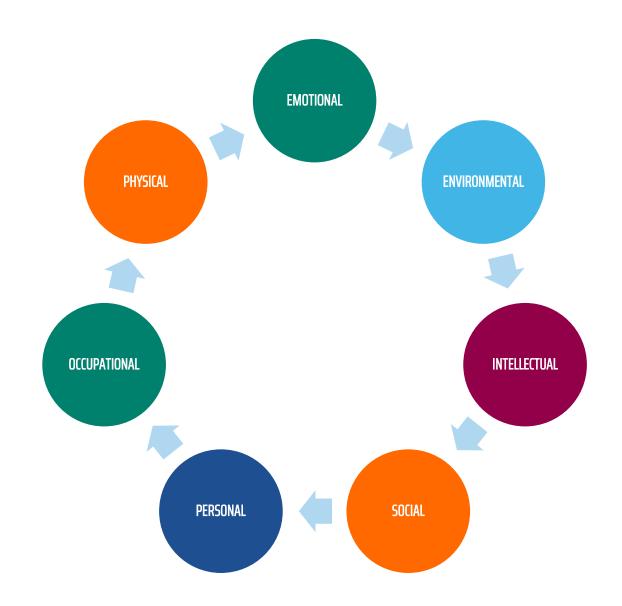
### PEER ASSISTANCE

Craig Nauta, CAE
Director, Peer Assistance



### PEER ASSISTANCE

Created to assist our members with wellness concerns.





### ENGAGING WELLNESS + QUESTIONS



Network of CPAs throughout Texas volunteer to share experience, strength and hope

- Individual conversations
- Support groups



### ENGAGING WELLNESS + QUESTIONS

## PEER ASSISTANCE GROUP CONVERSATIONS

- Stress and avoiding burnout
- Resiliency
- Power of gratitude
- Courage to change







### FORMAL ENGAGING ETHICS + QUESTIONS



## PEER ASSISTANCE INDIVIDUAL CONVERSATIONS

#### STUDENTS/CANDIDATES

- Report PI on the Application of Intent.
- Q. Can I still sit for the exam and be licensed?

#### **LICENSEE**

- Requirement to report a recent DWI conviction.
- Q. Will this impact my license? Will I be listed in the Board Report?



### ACCOUNTANTS CONFIDENTIAL ASSISTANCE NETWORK



The accounting profession is demanding of your TIME, ATTENTION & ENERGY

It shouldn't take a toll on your MENTAL & PHYSICAL HEALTH

If you are struggling with alcohol addiction, substance abuse or mental health issues, ACAN is here to help. ACAN can provide referrals to professionals who are familiar with your unique challenges. Don't hesitate to get the help you need today.

Call 866-766-2226 or visit tx.cpa/resources/acan







Craig Nauta, Peer Assistance Program Director

email: cnauta@tx.cpa

cell: 214.566.2854

office: 972-687-8538

WHAT NOW?





### YOUR NEXT STEPS



- Login to your account and get started!
  - Update your profile
  - Especially demographics
- Join a committee or start a discussion on TXCPA Exchange and **get engaged!**
- Reach out to your chapter and get connected!
- Explore our learning opportunities and **get** informed!





800-428-0272, option 1 8 a.m. – 5 p.m. CT, M-F



membership@tx.cpa



www.TX.CPA



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