

August/September 2020

FORUM

TXCPA Houston



***RISING
ABOVE
THE
PANDEMIC***

COVID-19 AND THE
WORKING PARENT

A DIFFERENT APPROACH TO
HEALTH INSURANCE RENEWALS

HOW CAN BUSINESSES EFFECTIVELY
REOPEN IN THIS NEW REALITY?

CPA-PAC CAN STAND
OUT IN A PANDEMIC

from the desk of _____



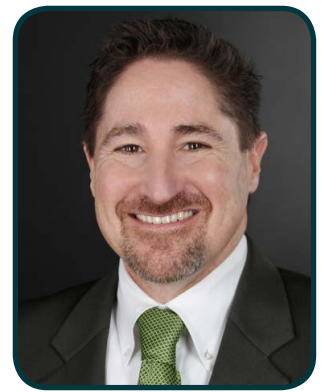
Darrell Groves,
CPA, CFE, CGMA
President

Perspective. It means a particular way of considering something. A point of view. In 2020, we have gained a different perspective on many parts of our lives that we may not have thought possible just a few months ago. As I took on the role of President-Elect in the summer of 2019, I thought that the biggest challenge I would face as President would be in collaborating with our leadership team for new and innovative ways to deliver the greatest value to our members. Well, that has not changed. And neither has our commitment to accomplish this objective. Our mission to educate, inform, and lead within the CPA profession and community remains the same. What has changed is the perspective of the methods that we now use to connect with you, our members.

A year ago, our chapter's efforts for advancing online webinars was struggling, at best. Today, we have visions of breaking attendance records at our online events and programs delivered tirelessly by our speakers, volunteers and staff because we chose to adapt to our realities and meet our members where they are. In June, participation at the annual meeting of the Texas Society of CPAs was double last year's in-person attendance numbers with over 400 members on a half-day Zoom call that featured Senator John Cornyn as well as many of our statewide leaders. In Houston, our upcoming [Energy Conference](#) and the [CFO/Controllers Conference](#) will both be delivered virtually, and we hope to expand our base of participants well beyond our past reach. It is always interesting to note that setbacks and disasters seem to have a way of bringing something out of you that you did not know you were capable of. You will not see us locking down our activities as our organization is representative of our resilient members – we keep working until the job is done... and guess what, our work is never done.

As you are deciding where to spend your time and resources, rest assured in knowing that at TXCPA Houston, we will continue to do what we have been doing since 1928. With that in mind, we are currently looking for our next crop of leaders as we accept nominations for local and statewide positions in the month of August. It could and should be you. Be the change that you wish to see in our chapter and in our community. Come to an event or meeting and I assure you that your perspective of what the Society can do for you and what you can do for the Society will be changed.

On behalf of the board of directors of TXCPA Houston, I thank you for your continued support of our organization and its mission.



Mark Allen, CAE
Executive Director

from the desk of _____

The words, "If it had been a snake it would have bitten you!" ran through my childhood every time my mother pointed to a pair of "lost" shoes I was about to trip over. This temporary inability to see objects in front of me was usually caused by distractions like watching cartoons or playing with my dog instead of focusing on finding what I needed. I'd like to think I grew out of that, but how many times do we professionals overlook valuable resources readily available to us? To be fair, we have extremely important distractions as adults: running businesses, serving clients, and taking care of families.

A benefit that qualifies as a "no brainer," at least to anyone who would like new clients without lifting a finger, is TXCPA Houston's Referral Service. Members of the public frequently call TXCPA Houston for help with finding CPAs. When that happens, TXCPA Houston will provide their contact information to several member firms that offer the requested services. Members must register for this service each year to be included. Learn more at <https://www.houstoncpa.org/for-the-public/referral-service> or contact Carol Spencer at cspencer@houstoncpa.org.

We are excited to announce a new video interview series being launched by TXCPA Houston board member Ryan Firth. This video series will help us stay focused on resources available to CPAs and accounting professionals. The first interview will be released at the end of July and features TXCPA Houston President Darrell Groves. He describes how he was able to launch his own firm and build its success by connecting with association members who shared helpful advice and practical guidance. After years as a non-engaged member, Darrell touts the value of engaging with like-minded professionals. Watch for details regarding this new video series.

An excellent way to engage with members is through the online TXCPA Exchange. Ask for advice, offer suggestions or simply stay informed of challenges CPAs are dealing with--without getting up from your desk! Visit <https://exchange.tscpa.org/home> to connect in a way that gives you complete control of how much or how little time you invest in interacting with your colleagues. This site also gives you access to an online library, a member directory, and a list of upcoming events.

An engagement opportunity that can help shape the association's future is recommending members for TXCPA Houston's Board of Directors. This year's Nominations Committee Chair is Immediate Past President Ramsey Womack. Send your suggestions to Ramsey at RWomack@WGconsulting.com or me at mallen@houstoncpa.org no later than August 15. Once approved by the Board, the slate of candidates will be announced in late 2020. Members will vote to approve the slate of candidates at the Annual Business Meeting on January 20.

Until then, read TXCPA Houston's weekly e-blast to stay informed of the many valuable member benefits you may have "misplaced" while you were looking the other way. Your mother will be proud of you!

TXCPA HOUSTON

TXCPA Houston

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Front Cover Image: Shutterstock.com

COVID-19 & The Working Parent

By Creative Financial Staffing

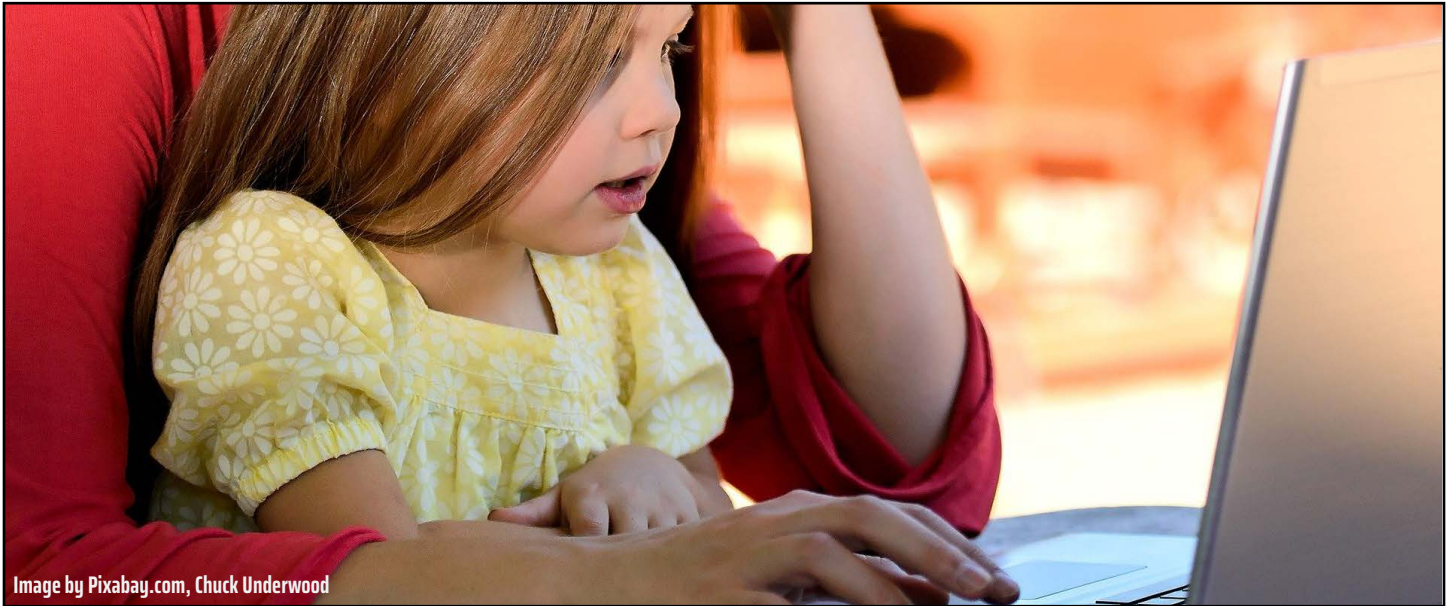


Image by Pixabay.com, Chuck Underwood

In some way, whether drastic or moderate, COVID-19 has impacted employees in industries across the nation. Employees at Creative Financial Staffing (CFS) are no different. We have experienced the challenges of working from home, all while being parents and attempting to home-school our children, both of which are challenges on their own.

As many others face these same challenges, we spoke with a few CFS employees to get their feedback/advice on how they are juggling it all.

Question: What are some of the challenges you have encountered while working from home/ having your kids home with you?

Julie Sorensen (Managing Division Director): I think the biggest challenge has been keeping everyone happy and occupied while trying to find solid blocks of time to get work done. It seems like my kids are

always having meltdowns or always need me while I am trying to work. Time management and coordinating with my husband (who also needs to get work done) has been difficult as well.

Meag Ventura (Managing Director, Executive Recruiting): The constant interruptions! While I am on the phone or leaving a message, my children are constantly popping up and arguing in the background. I think the biggest challenge would have to be trying to educate a 1st grader who wants nothing to do with homeschooling.

Ryan Glick (Managing Director, Executive Recruiting): Being able to balance being productive and homeschooling the kids and keeping them entertained at the same time. Every day is a new challenge.

Question: What have you done that has helped you stay productive during this time?

Pam Rodriguez (Senior Managing Division Director):

Setting mini goals has been the most effective strategy for me — answer 15 emails, then grab some water — it helps me keep my activity up but it also gives me the break I need. My office is kind of in a closet; it's an amazing space but there are no windows, so after awhile my brain needs a break from the dullness to keep pushing forward.

Diane LeMaire (Senior Managing Branch Director): I utilize the Bookings app to schedule all my calls and video meetings.

Lauren Becker (Senior Managing Division Director): I block off times throughout the day for my meetings. To stick to the schedule, I will put a movie on for the kids or have them FaceTime with their grandparents. This helps keep them busy so that I can get some work done.

Question: What have you done to keep sane during this challenging time?

Candace Dancy (Managing Director, Staffing): Prayer, meditation, and going outside ALONE to take walks or simply for some fresh air.

Sorensen: Meditation, working out early in the morning, and making sure we all get outside every day. I also meal plan or do the bulk of the cooking on the weekends. I listen to a lot of positive and motivational videos/podcasts too.

Shannon Wagner (Managing Director, Staffing): I have been staying active and running a lot. I also watch Netflix at the end of the night. It helps me reset and simply not think about everything for a little while.

Question: What challenges have you faced with homeschooling responsibilities and working from home?

Ventura: Our city does not have Zoom classrooms, so we get an outline each week instead. We must teach it. It's difficult to teach someone who doesn't want to be taught – there are plenty of battles. You just feel like your kid is falling behind and it's your fault. As a parent, I think you always feel like you can do better or that you are doing something that could have a long-term impact on your kids (maybe not everyone feels like this, but I do). Homeschooling is a challenge, but when you are trying to balance work too, it is nearly impossible.

LeMaire: My son sits with me in my office to do schoolwork

and he typically works on it all morning. According to the school, it should take about 90 minutes. I find that many of the assignments take much longer than expected.

Dancy: I have a 16-year-old and 9-year-old. Staying on top of them to get their work done and forcing them to leave the electronics alone has been very challenging. Technology has its benefits, but you also don't want your kids on it all day! It is also challenging being at home, and trying to work, with a teenager who thinks they know everything and has a teenage attitude.

Question: If your children are too young for school, how are you keeping them entertained while you work?

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Wagner: My daughter is three. She doesn't understand that I am working and can't give her constant attention. To keep her entertained, I set up a craft table and easel in my office. I also let her watch Disney+/TV, play educational games on the iPad, and play outside to burn energy.

Ventura: This is so hard – especially when my child has more energy in his pinky than the rest of my family. I try to get him outside as much as possible. I also set him up with movies that he likes, but he will not sit still. He ends up watching intermittently throughout the day.

Question: If you could give advice to other working parents in this difficult situation, what would it be?

Glick: This is brand new to everyone. There is no one right way to tackle this. Try and not stress. Every day is different. Just do the best you can.

Rodriguez: Take a walk after your workday and do this before you re-integrate with your family for the evening. Once I finish my day, my husband takes my daughter for a bike ride and I'll go for

a mile walk. It doesn't matter the time or the distance, but you need a chance to decompress. Otherwise, you just feel overwhelmed and like you've sat in the same spot all day.

Dancy: Take it one day at a time. Allow yourself to feel or go through whatever emotion you're going through. If you're feeling down, recognize it and then do something to help yourself get out of that funk and move on. This too shall pass!

Becker: Be kind to yourself! I have always loved what I do and my career with CFS – and I have never wanted to get back into the office more. I know we are all doing our best.



CFS is a leading, employee-owned staffing firm—the largest one founded by CPA firms. With more than two decades of experience helping companies locate, attract and hire exceptional accounting, finance and IT professionals, CFS has unique resources to better understand hiring needs, attract higher-caliber candidates and assess candidate potential. To learn more, contact Pam Rodriguez at pam@cfstaffing.com or visit cfstaffing.com.

As a leader in the Houston market, Creative Financial Staffing helps companies attract and hire exceptional accounting and finance talent. Founded by CPA firms, CFS has unique resources to better understand your hiring needs and assess candidate potential.



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A Different Approach to Health Insurance Renewals

By USI



Photo: Pixabay.com, Bruno /Germany

Many employers struggle to decipher the information presented in health insurance renewals. Carriers often utilize complicated underwriting techniques and algorithms that can be confusing. Employer complaints at renewal include:

- "My loss ratio was significantly better than last year, yet I'm still being hit with a 10% increase."
- "My renewal started at 19% and ended up at 8%. How can there be that much movement in the rate? Is the carrier overstating the initial cost to create the perception of more savings during the negotiation?"
- "I have an aggressive bid from a carrier, but I'm worried about getting hit with a high increase after year one."
- "Every year the carrier tells us that we have a few large claims driving our high increases. Aside from these few claims, we are a healthy population."

Although most HR teams are reluctant to disrupt their employees by moving to a new carrier, many brokers and consultants use the threat of marketing the plan to other carriers as the primary strategy to negotiate pricing with the

incumbent carrier. Often this strategy yields a 5% to 7% reduction from the initial rate. What some do not realize is that many carriers expect this threat and have inflated their renewal proposal accordingly. While the threat of going to market may work, it is not a consistent, evidence-based approach to generating a positive renewal.

USI offers a different perspective and process to help employers manage successful plan renewals. With a team of over 280 in-house underwriters, actuaries, and analysts working in local offices across the country, USI provides clients a superior level of insight and analysis. The team has decades of underwriting experience from a wide variety of backgrounds including regional and national health insurance carriers, reinsurance and life insurance carriers, as well as other insurance brokerages. As a result of this in-house knowledge, USI's benefits team has an in-depth understanding of the various financing and plan design models that carriers utilize to generate profit.

Leveraging the team's underwriting insight, USI actuaries have developed a unique analytical tool that helps employers understand how their renewal was calculated. The tool estimates the incremental revenue and profit hidden in each line of the carrier's renewal to reveal up to 10% of inflated premium.

Specifically, USI's underwriting process reviews five key components of a renewal:

- Claims Forecast
- Hidden Profits
- Fees
- Manual Rating Credibility
- Pooling and Large Claims

This deep analysis identifies where excess profit is typically made by the carrier so that USI benefit consultants can directly target those areas during renewal negotiations. In many instances, this provides an additional 3% to 6% premium reduction on top of the common renewal discount of 5% to 7%. For example, an employer with 200 employees may receive a renewal discount of \$100,000 to \$140,000 after their broker threatens to go "to market." By uncovering the carrier's excess profit, USI's analysis could potentially reduce the employer premium by an additional \$60,000 to \$120,000.

Negotiating an insurance renewal can be perplexing and stressful. Working with an experienced broker like USI is the key to a better understanding of the process and a more successful renewal.

Join us at the 2020 CFO/Controllers Conference for "COVID-19 Group Health Plans Compliance Update" hosted by USI's ERISA Counsel, Ford Darger and "Current Hard Insurance Market and What Tactically can be Done" presented by USI's Property & Casualty Practice Leader, David Paris.



To learn more about how USI can help negotiate a lower renewal rate for your health plan, please contact Katie Eubanks at Katie.Eubanks@usi.com or 832-493-1255.



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September 17, 2020 • Virtual Webcast • 8 a.m. - 5:30 p.m.

Recharge your leadership skills and gain valuable insights at our virtual CFO/Controllers Conference on Thursday, September 17, 2020. Topics will provide CFOs, controllers, and accounting professionals in public accounting and industry with relevant information and perspectives needed to lead their financial teams.

Date: Thursday, September 17, 2020

Location: Virtual

CPE: up to 9 hours

Prerequisite: None

Level of Instruction: Overview

Pricing:

Member/Non-CPA or
other chapter member: \$200

Non Member: \$300

Topics will include:

- Enterprise Risk Management
- Hiring and Staffing During COVID-19
- Diverse Workforce Management
- CARES Act Tax Implications
- Crisis Management
- Leveraging Banking Relationships

For more information, contact TXCPA Houston at cpe@houstoncpa.org.

REGISTER TODAY: www.houstoncpa.org or 713-622-7733

2020 CFO/Controllers Conference Goes Virtual, with No Less Vigor

By Pauline Le, CPA, CGMA, CITP, CFE

Heading into 2020, no one could predict how the coronavirus could have wreaked havoc the way it does to various sectors and industries globally as we see today. Serving in financial management and oversight roles, you are called upon for business re-planning and to help lessen the impact of economic downturns on your companies or clients – in addition to your day-to-day responsibilities. How have you coped during this extraordinary time? How do you manage and lead a remote workforce while keeping your teams motivated to perform at a high level? As uncertainties go on, how do you continue building resilience, incorporate best practices into the finance and accounting functions, while effectively working with other business functions, and recognizing business opportunities during economic downturns?

With the commitment to support our members serving companies in management accounting roles, the TXCPA Houston CFO/Controllers Conference Planning Committee continues to sponsor our annual conference to support your professional growth with quality CPE. Like many other professional conferences, the 2020 CFO/Controllers Conference will be held virtually, and I would like to personally invite you to join us for the event on Thursday, September 17, 2020. Hear from many regional, national, and international speakers on timely topics

related to the challenges and opportunities we face in today's business environment and interact with fellow professionals from the comfort of your home or office.

Big kudos to our planning committee which has worked tirelessly to bring you this year's rich agenda. Each of our committee members has worked for many years in various industries, been caught in unplanned business adjustments/re-adjustments since the shutdown began in the first quarter of the year, yet continuously demonstrated a strong commitment to bringing you robust and best-in-class content for this year's conference. We have met virtually every month to plan for the conference and feel even more connected to one another than before. If anything says teamwork at its best, our committee demonstrated just that.

For those of you who attended the CFO/Controllers Conference in previous years, we appreciate your participation and feedback, and hope to see you again this September as we continue to strive for excellence. For those who have not attended this annual conference before, we hope that this conference will bring you fresh, innovative perspectives, and help support your business and professional growth in meaningful ways. The CFO/Controllers Conference is also open to non-members

in management accounting and was actually my reason to become a TXCPA member in 2012; I remember looking for a local conference specifically designed for CFO/Controllers and stumbled across this one on my web search at the time. Besides the upfront cost savings on registration fees for this and all other conferences, there are other benefits of becoming a member, one of which is the opportunity to give back to the profession via volunteer services, where I met many good friends along the way.

On behalf of the CFO/Controllers Conference Planning Committee, thank you for your support of TXCPA Houston. The staff is committed to your professional success and to bringing you relevant resources during this difficult time. We appreciate their hard work and dedication, and appreciate the wonderful sponsors who believe in us. This conference would not have been possible without their support over the years.

While we will have to forgo that Sips 'n' CPE drink at this year's conference, I believe you will have a great time learning with us. I look forward to seeing you then!



Pauline Le, CPA, CGMA, CITP, CFE

Chair, CFO/Controllers Conference Planning Committee

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How Can Businesses Effectively Reopen in This New Reality?

By Sam Hall, Joel Smith, and Trey Weatherford

The speed and breadth of the unfolding COVID-19 crisis — dramatically impacting lives and healthcare systems, disrupting business operations and supply chains, slowing markets, and now posing the risk of a global recession — is putting nearly every facet of every business and industry to the test. As the energy industry continues to grapple with the unprecedented impact of COVID-19 – and slowly recovers from the historic event and simultaneous global price war – all eyes have shifted to closely watching the effects of the reopening phase.

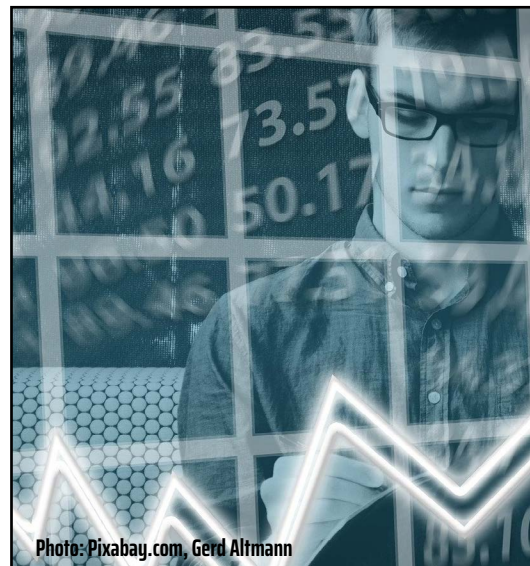
Navigating the uncertainties requires a sharp focus on people, liquidity, operational risks, and contingencies while keeping sight of the bigger picture — strategy, risk, and resilience. With information and conditions changing daily (even hourly), companies should expect to recalibrate their responses — and reframe their strategic thinking about how the COVID-19 crisis is impacting their businesses — as conditions change.

At KPMG, we're using our firm's Restarting America framework to help our clients carefully execute staged, careful approaches to reentry, using a framework that is flexible, adaptable, and risk-based. While we have not decided on a date to begin reopening our KPMG offices, when we do, we know that it will be a staged approach based on the framework and continued guidance from the Centers for Disease Control and all applicable federal, state and local mandates.

By following the Restarting America framework, companies are able to assess the overall prevalence of the virus within a given community, as well as the level of risk that an individual employee may have based on his or her unique personal characteristics, along with test status. Applying the framework to our reentry considerations allows us to remain committed to the health and well-being of our people, our clients and our communities.

As many organizations grapple with complicated decisions on reopening offices, we are also thinking about the "New Reality," producing industry-based insights to help leaders plan for the future. Our New Reality framework will address many of these complex and evolving needs – especially as supply chains continue to move, travel restrictions lift and demand returns. KPMG's Energy, Natural Resources and Chemicals team will be alongside clients to assist with proactive planning, stress test internal operations, examine the agility of supply chains and help upgrade technology so that when another unforeseen event arises, these organizations will be even more resilient than they are today.

It's true that the energy industry has proven time and again that it is incredibly resilient. Our New Reality will not be a snap-back to where we were, but, rather, a gradual recovery. Together, we will distinguish opportunities from obstacles as the industry reinvents itself to build a future that is sustainable and secure.



Sam Hall, Joel Smith, and Trey Weatherford are audit partners based in KPMG's Houston office. To read more about KPMG's Restarting America framework, visit <https://www.kpmg.us/insights/2020/restart-america-getting-back-to-work.html>.

2020 ENERGY CONFERENCE

Join us for the TXCPA Houston 2020 Energy Conference - Virtual Webcast on Wednesday, August 26. This is our 18th year for the conference, which features insights from top executives and professionals in the accounting and energy arena. Hear from thought leaders who will discuss mergers and acquisitions, technology, E&P, and more.

This year, our upstream keynote speaker is Jennifer Kirk, Occidental Petroleum Corporation.

Date:

Wednesday, August 26, 2020

Location:

Virtual Webcast

Session Times:

8 a.m. - 5:30 p.m. (Central Time)

CPE Hours:

Up to 9 hours

Prerequisite: None

Level of Instruction: Update/Overview

Pricing:

Member/Non-CPA or

other chapter member: \$200

Non Member: \$300

Trending Topics

- Energy Economic Update and Outlook
- Mergers and Acquisitions & Capital Markets Insights and Trends - Panel
- Tax Trends and Outlooks
- Cybersecurity
- Accounting and SEC Update
- Environmental Social Governance
- Environmental and Water Rights
- Mergers and Acquisitions, and Capital Markets Insights and Trends
- Artificial Intelligence (AI) and Data Analytics
- Geopolitical Law
- Oilfield Services Technology Evolutions

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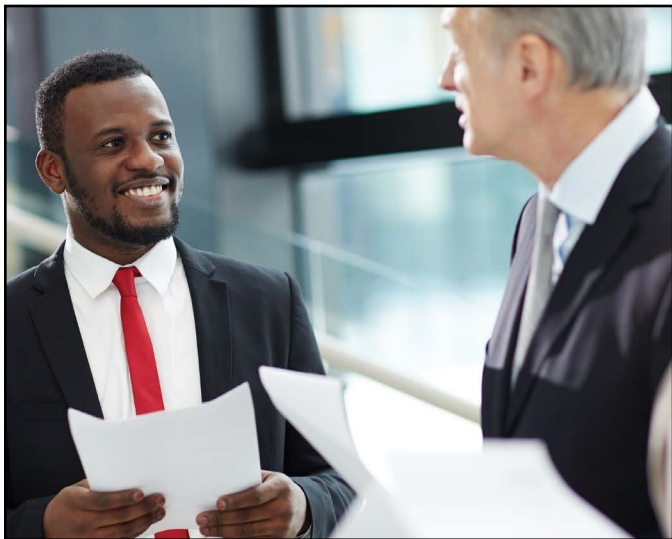
ENERGY CONFERENCE AGENDA

Time	Virtual Webcast
7:50 a.m. - 8:00 a.m.	Opening Remarks, Welcome and Log In Josh Mann - Houston Business Journal - Senior Energy Reporter
8:00 a.m. - 8:50 a.m.	Energy Economic Update and Outlook Dan Zhigatov - Enverus - Research Associate
9:00 a.m. - 9:50 a.m.	Mergers and Acquisitions & Capital Markets Insights and Trends - Panel Moderator - Pavi Mani - PwC - M&A Tax Partner Panelist - Hillary Holmes - Gibson, Dunn & Crutcher LLP - Partner Panelist - Thomas Amburgey - First Reserve - Director (Founders and Investment Team) Panelist - Kevin Rosenberg - EDP Renewables - Controller
10:00 a.m. - 10:50 a.m. (breakout session a)	Tax Trends and Outlook Steve Landry - EY - Tax Partner
10:00 a.m. - 10:50 a.m. (breakout session b)	Cybersecurity Tauseef Ghazi - RSM US LLP - National Leader for Cyber Governance & Compliance
11:00 a.m. - 11:50 a.m.	Accounting and SEC Update Robert Weatherford - KPMG - Audit Partner Sam Hall - KPMG - Audit Partner
11:50 a.m. - 12:30 p.m.	LUNCH
12:30 p.m. - 1:20 p.m.	Upstream Keynote Speaker Jennifer Kirk - Occidental Petroleum Corporation - SVP Integration and Value Capture
1:30 p.m. - 2:20 p.m. (breakout session a)	Environmental Social Governance Vrushali Gaud - PwC - Director, Sustainability and Future of Corporate Reporting John Corrigan - PwC - Partner Pavi Mani - PwC - M&A Tax Partner
1:30 p.m. - 2:20 p.m. (breakout session b)	Environmental and Water Rights Marcella Burke - King and Spalding - Environmental, Health and Safety Partner Granta Nakayam - King and Spalding - Environmental, Health and Safety Partner
2:30 p.m. - 3:20 p.m.	AI and Data Analytics Allison Leonard - Deloitte LLP - Senior Manager Ed Wilkins - Deloitte LLP - National Leader of audit Analytics and Assurance Ginny Coulter - Deloitte LLP - Audit Senior Manager
3:30 p.m. - 4:20 p.m.	Geopolitical Law James Auslander - Beveridge & Diamond, P.C. - Principal Peter Schaumberg - Beveridge & Diamond, P.C. - Principal
4:30 p.m. - 5:20 p.m.	Oilfield Services Technology Evolution Alan Quintero - Valaris - Senior Vice President, Business Development Chandra Yeleshwarapu - Halliburton - Senior Director of Digital Transformation
5:20 p.m. - 5:30 p.m.	Closing Remarks
Bonus/On-Demand Session	Bankruptcy, Restructuring and Reorganizations John D. Baumgartner - Stout Risius Ross, LLC - Managing Director Josh Sussberg - Kirkland and Ellis LLP - Partner

PLEASE NOTE: Current schedule represents approximately 9 hours of CPE if you attend all sessions. Hours may be reduced or increased before the actual conference date. Refer to the program at the event for correct number of hours.

Historic Opportunity: CPA-PAC Can Stand Out in a Pandemic

By Steve Goodman, CPA, CFP®



Fundraising is never easy, especially during a pandemic. Now more than ever, our Texas legislators will appreciate and remember the support of our CPA-PAC. By supporting our PAC, we in turn can make an expression of support to those candidates who we expect to support issues important to Texas CPAs.

Recall that a contribution to TXCPA PAC is an investment in your profession. Your local TXCPA Houston PAC Steering Committee is a **non-partisan** group that is tasked with raising funds and then allocating them to **candidates who are pro-business and supportive of our profession.**

We need your help. Houston, the largest chapter within the TXCPA, is typically overshadowed when it comes to the percentage of participation of our members in the PAC versus other chapters. In fact, as of the June report to the TXCPA Annual meeting of members, Houston, while garnering the highest total dollars due to our size, was third from last when it came to members contributing to the PAC. Only Dallas and Texarkana were further behind in participation. Please don't let us fall behind Dallas. Texarkana gets a pass due to its split personality, as it doesn't even know what state it is in.

When the PAC supports legislators, they return our phone calls, they welcome our visits, they remember us, and they listen to us. It is through

that access that **TXCPA has had tremendous legislative success.**

Success in recent years includes the **renewal of the Texas Public Accountancy Act** at the conclusion of the sunset review process, another session with **no sales tax on our professional services**, and in a previous session, the **elimination of the \$200 professional services "head tax,"** essentially reducing your annual licensing fees by \$200.

The steady support we provide to **CPA friendly legislators** is greatly appreciated by those elected officials, and certainly a lot more effective than large contributions only when we need something, which certainly is not the CPA way. **Our profession is counting on us, as are our clients and employers.**

Please help us by supporting the profession. Donate via the **TXCPA CPA-PAC secured webpage** at <https://www.tscpa.org/advocacy/cpa-pac>.

You may mail your check, payable to TXCPA CPA-PAC, to:

TXCPA CPA-PAC
14651 Dallas Parkway
Suite 700
Dallas, TX 75254-7408

You may opt to donate to the CPA-PAC by means of an annual pledge or when paying your membership dues to TXCPA.



Steve Goodman, CPA, CFP® is the Founder and President of Goodman Financial Corporation which was registered in 1989. As President, his responsibilities include firm management, and maintaining client and firm relationships. Prior to Goodman Financial Corporation, Steve worked in public accounting for Ernst & Young as a tax consultant and subsequently with his own firm. For more information, visit www.GoodmanFinancial.com.

Get New Clients Through TXCPA Houston's CPA Referral Service

By Carol Spencer

Welcome to your 2020-2021 membership year! Each new year is a time to share business opportunities, to build relationships, and to grow your business.

Did you know that TXCPA Houston offers a CPA Referral Service that directs members of the public to member firms? Both the chapter office and TXCPA receive frequent online and phone requests from individuals, or other professional firms, for assistance from a CPA. The Chapter will refer potential clients to registered firms.

If your firm is a public accounting practice unit, registered with the Texas State Board of Public Accountancy, your Chapter membership allows you to join the Referral Service at

no charge. Once your application is approved, TXCPA Houston will provide inquirers with contact information for three to five firms that provide the services they seek. To maintain accurate information, firms must renew their registrations each membership year (June 1-May 31).

Once accepted, firms are required to offer a consultation of up to one-half hour at no charge, if requested by the referred party. Registered participants must also provide their customary fee schedules to inquirers if they request continued service. All partners or shareholders must hold membership in TXCPA/TXCPA Houston, and the practice unit must be engaged in the practice of public accounting on a full-time basis.

Why wouldn't you enroll your firm in a free program that sends potential new customers to you? Complete the CPA Referral Service application at <https://bit.ly/TXCPA-Houston-CPA-Referral-Application> to take advantage of this "no brainer" benefit.

We appreciate your membership and we want you to take advantage of the best benefits for your professional needs. Remember, **TXCPA Houston** is here for you – before, during, and after a pandemic, disaster, or community strife.

If you have any questions concerning your membership or volunteer opportunities, please contact Membership Manager Carol Spencer at cspencer@houstoncpa.org or 832-831-9232.



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2020 Membership and a Pandemic - Moving Forward Through Adversity

By Carol Spencer

The 2020-2021 membership year is two months old. Have you seized growth and networking opportunities or is COVID-19 at the forefront of your life? In the current situation, it is more important than ever to remain part of the synergy your group generates and utilize resources to their fullest. Work together to resolve issues and ultimately improve the experience for others.



- Develop your community at TXCPA Exchange at <https://exchange.tscpa.org/home> and join the discussion! Connect with other TXCPA members across Texas using the member directory; join a dynamic discussion group and ask questions, get advice, or answer questions from your peers. Browse the resource library and build a knowledge base of industry best practices, sample documents, spreadsheets, photos, videos and more.
- Hurricane season is here for four more months. Disaster Recovery Resources at <https://www.tscpa.org/resources/news/advocacy/legislative/general/disaster-planning> is your place to go for updates in the event of a disaster.
- Coronavirus Crisis Resources, <https://www.tscpa.org/resources/news/viewpoint/coronavirus->

[resources](#), is your page to help Texas CPAs manage COVID-19 business issues and includes the latest news for reporting guidance, the Small Business Paycheck Protection Program, loan information and more.

- Are you looking for other employment, or is your business in need of additional workers? Visit our Career Center at <https://careers.houstoncpa.org/> for both job seekers and employers. Simple registration is required on the site, where job seekers have access to resume posting, job applications, and job alerts. Employers can manage applications, post jobs online, search resumes, and even set up an email resume alert so you don't lose the ideal candidate. As a member, you receive a discounted fee for your job postings and have options to create
- a customized video to post with your ad or develop a Twitter campaign.
- Growth and leadership can be found through our committees. You might prefer a visit to a meeting or two before deciding what is your personal niche. If leadership is your forte, contact Carol Spencer, cspencer@houstoncpa.org, regarding committee openings. Committee leaders often receive the first opportunity to join the TXCPA Houston Board of Directors.
- Accelerate – a four-week program connecting future leaders, will begin accepting applications this month. The new virtual program will incorporate opportunities for in-person participation, all while maintaining a healthy social distance for everyone's protection.
- Network and build relationships that will offer support – local membership events include morning buzz, luncheon CPE, happy hours and more including virtual happy hours. Have you had the chance to attend a virtual trivia happy hour?
- Share your professional career knowledge with the future – mentor a CPA-Candidate, university

student, or a newly licensed CPA. Help them navigate career options to further their career.

- Support charitable activities – scholarship programs at state and local levels; chapter program for grades PreK-12 education; annual fundraising events. Your support, financial or voluntary participation in planning and executing is critical to the future of the profession.
- Accountants Confidential Assistance Network, <https://www.tscpa.org/resources/acan> – if you might be one of the more than 10,000 Texas CPAs who have a problem with alcohol, substance abuse, depression, stress or other mental health issues, ACAN is here for you. ACAN has a network of CPA volunteers to assist CPAs, CPA candidates and students who want to know if they have a problem and talk about potential solutions. ACAN network members hold regular meetings and help attendees understand they are not alone. The volunteers understand the pressures of the profession and want to share solutions.

Your TXCPA and TXCPA Houston communities are here for you. Contact our staff members and current chapter leadership at <https://www.houstoncpa.org> if you have any questions.

Follow us on Facebook at <https://www.facebook.com/TXCPAHouston> or on LinkedIn at <https://www.linkedin.com/company/houston-cpa-society> to get the most up-to-date information for CPE, events, and resources we have compiled to have as a one-stop place. We are a community and here for one another.

If you have any questions concerning your membership or volunteer opportunities, please contact Membership Manager Carol Spencer at cspencer@houstoncpa.org or 832-831-9232.

Forgot to Renew Your Membership?

Renew your membership investment today to reactivate your member savings on CPE and reconnect to the valuable benefits of belonging to TXCPA:

- **Advocacy** for your license
- A connection with fellow members through **TXCPA Exchange**
- **Access to thousands of timely and convenient CPE** options, including **free Ethics CPE** online and a Passport to webcast courses for only \$199
- And more!

Visit <https://www.tscpa.org/membership/become-a-member> to renew online.

ARE YOU READY TO TAKE YOUR SKILLS TO THE NEXT LEVEL?



TXCPA Houston is now accepting nominations for nine Directors and four Officers on the 2021-2022 Board of Directors.

Nominate yourself or other TXCPA Houston members who have the knowledge and skills to keep the Society at the top of its game. Nominations will be accepted until August 15, 2020. The election will take place at the Annual Business Meeting. Submit applications at <https://bit.ly/TXCPA-Houston-Nominations-Form>.

2020 Scholarship Extravaganza - NEW DATE!

Saturday, September 26, 2020 · 6:30 - 9 p.m.

Virtual Webcast



Thank You to our 2020 Scholarship Extravaganza Supporters

Magna Cum Laude \$10,000

Ernst & Young

Cum Laude \$5,000

Briggs & Veselka Co.

Deloitte LLP

John England/Paul Horak

Fitts, Roberts, Kolkhorst & Co., P.C.

Frierson Sola Simonton & Kutac PLLC

Goodman Financial Corporation

Reed and Janet Wood

WG Consulting

Chancellor's List \$2,500

BKD CPAs and Advisors

Lee & Desenberg, PLLC

Fred and Mabel Parks Foundation

Gail Neely/Dell Inc.

Dean's List \$1,000

Tom and Nancy Bewley, Blomstrom Financial Services, David Donnelly,

DWG CPA PLLC, Jeff and Aletha Harris, Horn Solutions Inc.,

William H. Hornberger, Kelly Hunter, Mohan Kuruvilla,

LaPorte CPAs and Business Advisors, Mark and Alice Lee,

Gunther von Gynz-Rekowski, Ramsey and Robin Womack

Program Supporter \$500

Bill and Jean Frazer, Frierson Sola Simonton & Kutac PLLC,

Charlotte Jungen, Mosbacher Energy Company

Visit www.houstoncpa.org or contact Carol Spencer, cspencer@houstoncpa.org for more information.

Chapter News - Member Highlight

PKF Texas Founder Kenneth Guidry, CPA, Honored with Most Admired CEO Lifetime Achievement Award

By PFK Texas



Kenneth Guidry, CPA, PKF Texas Founding Shareholder and retired Director, will be the recipient of the *Houston Business Journal's* (HBJ) inaugural Lifetime Achievement Award at their Most Admired CEOs recognition event in August.

In January 2020, Guidry officially retired from PKF Texas but assumed the new role as a Director Ambassador for the firm. Throughout his career, Guidry has played an integral role not only at the firm and in the accounting profession, but also in the Houston marketplace. During his tenure as firm President from 2005 - 2018, the firm saw 136% organic growth and was named a 2014 "Best of the Best Firms" by *Inside Public Accounting*, as well as "Best Company to Work for in Texas" by *Best Companies* and a "Best Accounting Firm to Work for in the U.S." by *Accounting Today* multiple times. He has served on numerous boards, including PKF International, Allinial Global, University of Houston C.T. Bauer College of Business, Greater Houston Partnership, Center for Houston's Future and many more. He is a board member and Treasurer of the TriCities Chapter of the National Association of Corporate Directors, a Spring 2011 graduate of the Center for Houston's Future and a senior fellow of the American Leadership Forum (ALF) Class XXXVII. He has been a member of TXCPA Houston since 1983.

Bob Charlet, market president and publisher of the *Houston Business Journal* said, "Kenneth Guidry epitomizes the spirit of the Most Admired CEO recognition, and it's only fitting that he would be chosen for this inaugural recognition. His leadership was integral in the ascent of the firm to its current status in Houston. He is the consummate professional, and his legacy will also include a robust history of impact with business, community, and charitable organizations."

Guidry will be honored at the HBJ's Most Admired CEO event on August 20 from 2-3 p.m. The Most Admired CEO awards will be held virtually via a live stage.

RSVP at www.bizjournals.com/houston/event.

Chapter News - Student Auxiliary



New faces and new formats to provide the hottest accounting career topics for today's university student and tomorrow's CPA!

TXCPA Houston's Student Auxiliary is open to any student who is pursuing a degree in accounting or finance in one of the college systems or universities in our region: the local counties of Austin, Brazoria, Colorado, Fayette, Fort Bend, Galveston, Harris, Montgomery, Polk, San Jacinto, Trinity, Waller, and Walker.

Student membership is FREE and includes privileges within TXCPA and TXCPA Houston, your local chapter. You have access to employment opportunities and resume posting on the Career Center (<https://careers.houstoncpa.org>), and discounts for Becker CPA Review and other CPA Exam review courses at <https://www.tscpa.org/resources/become-a-cpa/exam-providers>. Keep current on accounting issues with Houston's bimonthly Forum e-magazine and TXCPA's electronic Today's CPA and Viewpoint publications.

As a student member, you may apply to become a Student Ambassador at <https://www.tscpa.org/resources/become-a-cpa/be-an-ambassador> and work with the faculty ambassador to promote TXCPA, identify campus opportunities for TXCPA Houston, and recruit students from your campus to join and attend local events. This becomes a fantastic resume addition for you!

Active student members realize TXCPA Houston's Student Auxiliary (SAUX) provides a strong transition to their career as a CPA. Meet local accounting professionals and perhaps receive an invitation to their firm lunch – be one of the few. Experience leadership growth in serving as a SAUX officer, under the coaching of TXCPA Houston members. Applications for 2021 – 2022 officers will be available in November.

TXCPA Houston is proud to announce your Student Auxiliary officers for 2020 – 2021. After interviews with current officers and our Student Auxiliary Steering Committee, these outstanding students have accepted officer positions for the new fiscal year:

President

Ekaterina Lyubomirova,
University of Houston

Vice President Campus Relations

Liboria Chavez,
University of Houston Downtown
Roman Khoja,
Houston Baptist University

Vice President Development

Pooja Sharma,
Houston Baptist University

Vice President Marketing

Vicky Tang,
University of Houston

Vice President Operations

Anh Nguyen,
University of Houston

The Student Auxiliary Steering Committee works with the officers to educate, inform, and lead by creating an environment of support for students to transition into accounting professionals.

The 2020-2021 Steering Committee will be led by co-chairs Mirza Shayan Baig and Manu Sadiev. Baig is a Mobility Tax Consultant at EY, and Sadiev is a Senior Manager in Audit at Briggs & Veselka Co.

The officers and committee held their virtual two-day planning retreat in July. Officers learned more about TXCPA and TXCPA Houston member benefits, history of the committee, and policies and procedures, before planning the two-semester calendar. Visit <https://www.houstoncpa.org/membership/students-and-candidates> to stay tuned for the 2020-2021 Student Auxiliary Event Schedule.

COVID-19 has allowed everyone to evaluate their plans and change direction in future events. All TXCPA Houston Student Auxiliary events will be offered on a virtual platform until conditions are safe for in-person activities.

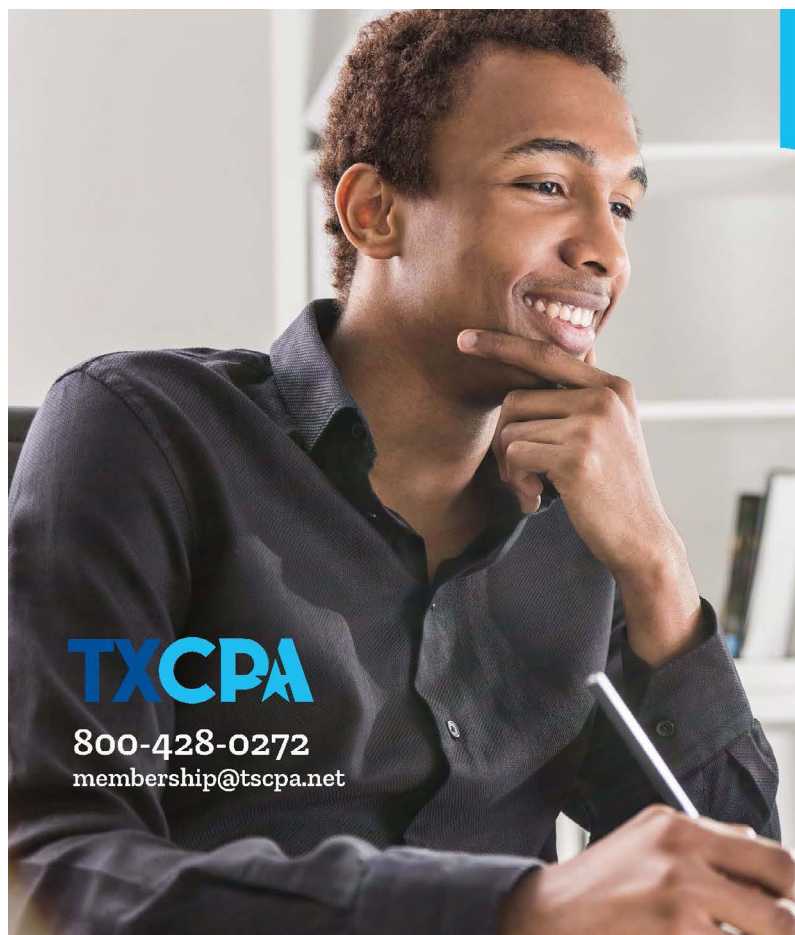


Join us for our Fall Semester events on Zoom – details to follow at www.HoustonCPA.org.

If you would like to participate as a panelist and speak to the students, or would like more information about the programs, contact Membership Manager Carol Spencer, cspencer@houstoncpa.org or 832-831-9232.



Carol Spencer is the membership manager at TXCPA Houston.



TXCPA

800-428-0272
membership@tscpa.net

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TXCPA Student Affiliate members benefit from:

- » Local networking events and service opportunities in our 20 local chapters
- » Access to TXCPA Exchange, an exclusive members-only online forum for questions, knowledge sharing and opportunities to connect with Texas CPAs
- » Access to an online searchable member directory of our 28,000 members
- » Scholarship opportunities with TXCPA and our local chapters
- » Discounts on CPA Exam prep courses
- » Free job seeker profile on the TXCPA Career Center and access to internship postings
- » And more!

Chapter News - CPE Catalog

VIRTUAL CPE CLASSES, SEMINARS & CONFERENCES [Register at www.houstoncpa.org](http://www.houstoncpa.org)

Date	Course	Hours
08/19/2020	Mid-Year Federal Tax Update, Steven J. Tillinger	8 hours
08/20/2020	Northwest Roundtable - Microsoft Tools, Dan Krishman	3 hours
08/26/2020	2020 Energy Conference	9 hours
08/28/2020	Ethics: It's a Matter of Choice, Deanna Sullivan	4 hours
08/31- 09/01/2020	Partnership/LLC Tax Issues & Update, Steven J. Tillinger	16 hours
09/17/2020	2020 CFO/Controllers Conference	9 hours
09/17/2020	Northwest Roundtable - Medicare, Stevan Delossantos	3 hours
09/25/2020	Ethics: It's a Matter of Choice, Deanna Sullivan	4 hours
10/22/2020	Northwest Roundtable - Financial Markets Update and Tax Efficient Investing, Steve Goodman and Chris Matlock	3 hours
10/26-27/2020	2020 Medicare/PFP Conference	16 hours
10/30/2020	Ethics: It's a Matter of Choice, Deanna Sullivan	4 hours
11/19/2020	Northwest Roundtable - Change the Way You Think of Change, Monica Canales	3 hours
11/20/2020	Ethics: It's a Matter of Choice, Deanna Sullivan	4 hours
12/3/2020	Northwest Roundtable - HR and Payroll in Today's Climate	3 hours
12/11/2020	Ethics: It's a Matter of Choice, Deanna Sullivan	4 hours
12/14/2020	Federal Tax Update , Steven J. Tillinger	8 hours
12/17/2020	Individual Income Tax Update, Blaise Bender	8 hours

If you have any questions about any TXCPA Houston courses or conferences, please contact TXCPA Houston at cpe@houstoncpa.org or call 713-622-7733.

Chapter News - Upcoming Conferences

**MARK YOUR CALENDARS FOR THESE
UPCOMING CONFERENCES!**

Register at www.houstoncpa.org.

Energy Conference

August 26, 2020 - Virtual Webcast

Seasoned energy professionals and executives address the significant current issues affecting the energy industries as well as the accounting processes.

CFO/Controllers Conference

September 17, 2020 - Virtual Webcast

A one-day conference catering to the financial leaders of small to mid-size companies.

Medicare Workshop/Personal Financial Planning Conference

October 26-27, 2020 - Virtual Webcast

This two-day event provides attendees valuable knowledge for planning and decision-making in all financial stages of life.

Tax Expo

January 11-12, 2021 - Virtual Webcast

The conference will equip CPAs and tax practitioners with the updates and resources needed to prepare for tax season.

Spring Accounting Expo

May, 2021 - NRG Center

Join accountants and financial decision-makers for a two-day event focused on the future of accounting.

If you have any questions or need help registering, please contact cpe@houstoncpa.org or call 713-622-7733.

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Featured Practices for Sale (gross revenues shown):

- League City Area CPA \$1.8MM
- The Woodlands Area Tax \$1.6MM
- West Houston CPA \$1.1MM
- West Houston CPA \$725K
- NW of Houston CPA \$404K
- West Houston CPA \$350K
- SE Texas CPA \$310K
- NW Houston CPA \$240K
- Houston CPA \$218K

Looking to Purchase -

CPA with 25 years experience looking to purchase a practice in the Houston area. Contact James, jfullencpa@gmail.com.

Looking to Share Office Space -

CPA near retirement but not ready to retire is looking to share office space with an equally aged individual with a view to transition into retirement or into other ventures as opportunity brings forth. Current offices in the Galleria area (4900 Woodway Dr. #1200, Houston, TX 77056) are very attractively built-out. In addition, the office building across the street is in the final stages of remodeling and the owner is very aggressive in lowering rent significantly. Call William E. Blummer, CPA at 713-623-2113.



LOOKING FOR A NEW OPPORTUNITY?

Visit the TXCPA Houston Career Center to find the job that's right for you!

Employers and recruiters can access the most qualified talent pool with relevant work experience to fulfill staffing needs. Job candidates can access the most successful and rewarding companies to invest their skills and talents in.

Recruiters: Target your recruiting and reach qualified candidates quickly and easily.

Job Candidates: Post your resume to all employers, even confidentially and get job alerts sent to your inbox.

Simply complete our online registration form and start posting jobs or searching for jobs today!

Visit careers.houstoncpa.org today!



Information and opportunities relevant to you!

Name: _____

Business: _____

Email: _____

Phone: _____

Address: _____

Get involved with TXCPA Houston by serving on committees important to you. Please check your top three committee(s) based on interest.

CPE Related Committees

Quality control and oversight of Society CPE

_____ CFO/Controllers Conference

_____ CPE by the Sea

_____ Tax Expo

Membership Related Committees

Work on Society image enhancement, career awareness and member services

_____ Membership Development

_____ Young Professionals

Industry/Other Committees

Plan topics, serve as on-site coordinators for industry CPE

_____ Business & Industry

_____ Energy

_____ Healthcare

Professional Services Committees

Plan topics, serve as on-site coordinators for CPE

_____ Accounting & Auditing

_____ Forensic & Valuation Services

_____ Personal Financial Planning

_____ Circular 230 Roundtable

_____ Northwest Roundtable

Charity/Civic Related Committees

Sponsor community and organization events

_____ Accounting Scholarship Endowment

_____ Accounting Scholarships

_____ CPAs Helping Schools/
Accounting Career Education

_____ CPA-PAC

_____ Public Affairs

_____ Scholarship Extravaganza

Thank you for signing up!

Your active participation will provide: current topic updates, professional development, networking opportunities ... and more!

You will be placed on the distribution list for each chosen committee. Committee meeting dates vary from monthly to quarterly. Email this form to chapter@houstoncpa.org.



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