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TXCPA Houston

PLANNING FOR THE FUTURE

CYBERATTACKS, NATURAL DISASTERS, AND HUMAN ERROR

Learn why your business needs a business continuity plan

CLIENT ASSESSMENT CHECKLIST

Conduct the due diligence needed to protect yourself from problematic clients

INNOVATIONS IN AUDIT (+BLOCKCHAIN) AND TAX (+CYBER)

Get ready for the technology-based accounting practices that are transforming the CPA profession

INFORMATION CENTRAL, INFORMATION CRITICAL

Find the best-in-class technology to elevate your accounting department

Message

from the desk of



Ramsey Womack, CPA
President

In June, I had the pleasure to represent the chapter at the TXCPA Annual Meeting with 30+ other Houston Chapter members. The 2-day meeting allowed our leaders to gather with other CPAs from around the state to discuss issues impacting the profession including CPA Evolution.

CPA Evolution is a joint project that the American Institute of Certified Professional Accountants (AICPA) and the National Association of State Boards of Accountancy (NASBA) are working on that is looking at the impact of technology within the profession and what does that mean for CPA licensure in the future. They are asking for feedback from CPAs in regards to their thoughts on some guiding principles they have developed that they believe address why the profession must make some shifts in regards to technology and the profession in the very near future in order to maintain relevance and keep up with knowledge needed to be successful within the profession. For more details on this project and to comment, visit www.evolutionofcpa.org.

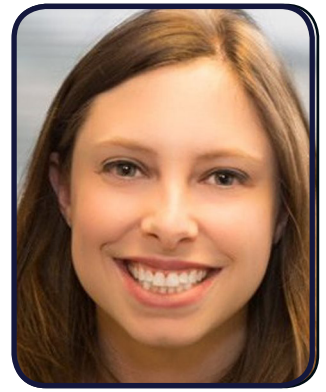
We have some fantastic events coming up with several membership networking events, our 2019 Energy Conference and CFO/Controllers Conferences. The Energy Conference on August 28th will have Mark McCollum of Weatherford doing a keynote speech and Scott McClelland at Sips and CPE. This premier conference allows accounting professionals serving the energy sector the opportunity to earn up to 10 hours of CPE and network with their peers. At the CFO/Controllers Conference, Bill Gardnier, CFO of King Ranch will be providing a keynote presentation during lunch. This year's conference has been expanded to two tracks. We hope you all can join us and bring your colleagues to these upcoming events. For more info, visit www.houstoncpa.org.

Our Membership Development Committee is also off to a great start. They have numerous networking events all over the Houston area planned and they will be assisting with upcoming phone calls to our members who haven't renewed. The group has also been charged with reaching out to their networks and inviting colleagues and peers to our events and to join. We need everyone's help in this area, so reach out to your co-workers, family and friends who are CPAs and ask them to join and participate today. Your membership allows you to be a part of the premiere association for CPAs in Texas and to belong to the largest network of members locally in the country by being a part of the Houston Chapter. Your membership gives you access to continuing education, a voice in protecting and promoting the profession, networking through both in-person and digital resources, and career development. If you have questions about what your membership can do for you, please email chapter@houstoncpa.org.

The mid-year Board meeting for TXCPA will be in Houston on January 24-25, 2020 at the Omni Houston Hotel. Let's welcome our fellow CPA colleagues when they visit our city in January.

Message

from the desk of



Jennifer Poff, CAE
Executive Director

In mid-July I attended the American Institute of Certified Professional Accountants' (AICPA) Interchange Conference. This conference brings all CPA Society staff from across the country to brainstorm and share ideas. Innovation is definitely at the forefront of what the CPA associations are doing and most are facing the challenges head on.

TXCPA Houston is definitely leading the charge in a few areas and is way ahead of our peers in regards to our student programming and business and industry offerings. Our Student Auxiliary is thriving and even gaining recognition at state and national level for their work. We are also making sure that our programming for students includes information on technologies that are impacting the profession and helping them build skillsets to provide them with an additional advantage potentially over their peers when they enter the marketplace.

Our Spring Accounting Expo received great feedback after we revamped the conference based on the CGMA competency framework. We attracted participants from many large industries in Houston. We began webinars promoting topics at the conference allowing for discount (a concept other organizations are now using based off of hearing about Houston doing it). Our industry conference is definitely one of the largest business and industry events in the CPA society space. This allows us to help be a leader for others throughout the country.

We came back from the conference with many great ideas and colleagues from other locations wanting to learn how Houston does some things. We look forward to being a leader in the CPA Society marketplace by sharing these ideas with Texas and others to help CPAs everywhere.

TXCPA HOUSTON

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Your company needs a business continuity plan. Here' why.

By Alan Villanueva, CTP senior vice president, treasury management services



Risks to companies today seem to be ever increasing and ever changing. Cyberattacks, natural disasters, and human error are just a few reasons why you need a business continuity plan. In the event of a business interruption, what will you need to maintain uninterrupted cash flow during the disaster?

The first step in developing a business continuity plan is to fully understand all of your business processes and their exposures. This requires a detailed review of operations and documenting all cash flow-related processes and how different disasters could impact them.

You also must define all mission critical treasury activities — those that you could not live without for several days — and determine how you could work around them if they were interrupted. For instance, in the event of a disaster, how will you fund payroll and time-sensitive trade payment disbursements?

Draw up a list of possible disasters and determine which ones are most likely to impact your organization. Then tailor a business continuity plan for those events. It should encompass people, infrastructure (hardware, facilities and software), and the reference

materials that support each response, including call lists and instructions

Tools to bolster your plan

It's wise to incorporate into the plan how you will use a variety of tools your bank can provide, such as:

- Online and mobile banking that lets you review information, initiate and approve transactions, pay and receive bills, and manage accounts anywhere you have Internet access.
- Remote deposit, so you can deposit checks electronically when physically transporting them to a bank branch would be problematic.
- ACH origination and wire transfers. These services allow you to deliver critical trade, tax and other payments electronically without worrying about mail delays.
- Same-day ACH can help when you need more flexibility in timing payroll or fast payout of insurance claims and reimbursements, or when you want to offer a same-day bill payment option to your customers.
- Direct deposit of payroll lets you electronically deposit pay into employee

accounts and avoid disaster-related delays that can occur with paper checks.

- A business, purchasing or virtual credit card can help you manage company expenses before, during and after a disaster. In addition to being widely accepted, cards typically offer travel and emergency assistance along with other important benefits. When cards are paired with online and mobile card management programs, you can easily adjust parameters such as spending limits in real time to quickly adapt card features in response to an event.

Importance of preparation, testing

Don't wait for a disaster to strike to become disaster ready. Planning and preparation can take time, but you don't have to go it alone. Our treasury services specialists can assist with a wide variety of cash management solutions, and help you prepare for whatever challenges or opportunities your business may face.

Finally, be sure to test your business continuity plan at least annually. In addition, whenever your organization experiences significant change — such as new technology, a new business line or an acquisition — update the plan to reflect that change.



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Alan Villanueva leads Treasury Management Services in Texas, partnering with mid to large size organizations by providing guidance on their cash management strategy. Alan has been in the banking industry for more than 15 years. He is a Certified Treasury Professional (CTP) with a B.S. in Economics from the University of Houston.



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Client Assessment Checklist

By Suzanne M. Holl, CPA, CAMICO



Any client, whether new or established, can become problematic for a variety of reasons.

For example, a problem client may—

- be unhappy with the results of an engagement, though there was nothing wrong with the services performed;
- believe that the CPA rendered substandard services (especially if the client is unhappy with the results);
- manage financial affairs poorly, creating maelstroms for which the CPA is held responsible;
- be financially irresponsible and more inclined to blame the CPA when finances take a downturn;
- owe so much money to the CPA that the client CPA firms should evaluate all potential new clients and re-evaluate all current clients on a regular basis, at least annually.

This enables the firm to better monitor clients, consider any changes that might affect the professional relationship and avoid situations that could escalate into crises. Firms can also stipulate in their engagement letters that the engagement is not binding until client

acceptance procedures have been completed.

The following questions are designed to help CPAs conduct the due diligence needed to ensure that the client is a good fit for the firm, and that the firm is comfortable with the client.

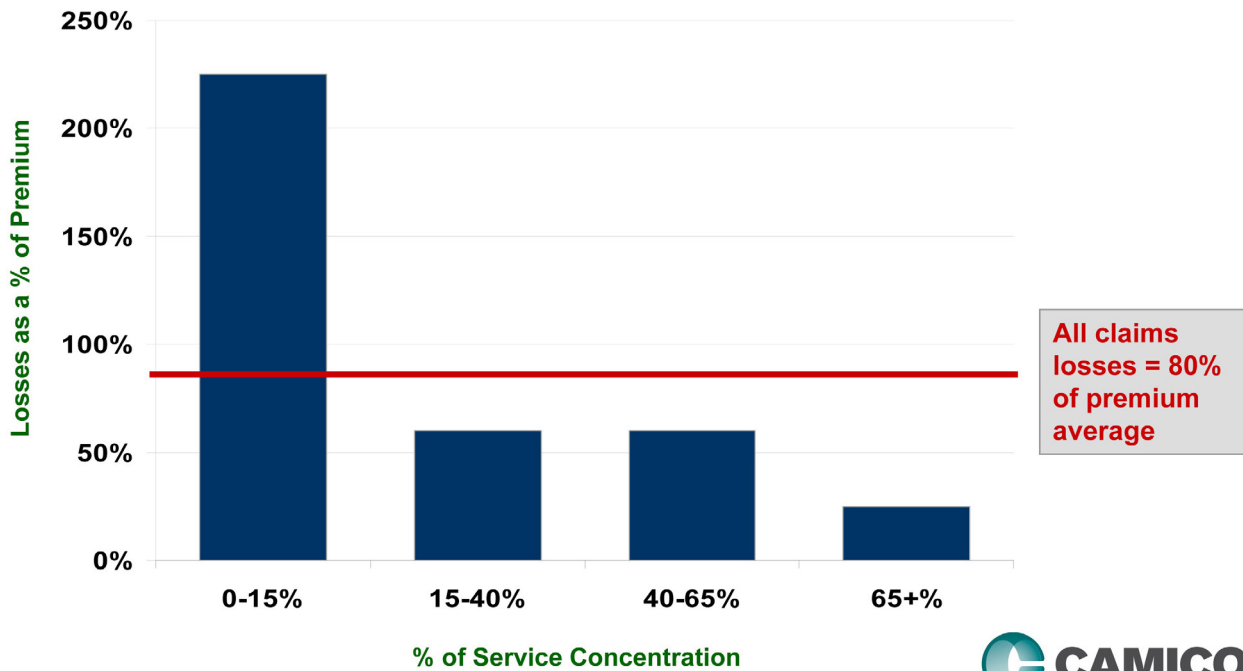
1) Is the engagement a good match for the firm's expertise?

If the firm accepts an engagement for which it is not professionally staffed or qualified, it runs the risk of disappointing the client, or a third party, and exposing itself to litigation and ethics violations. Due care demands that firms a) are capable of performing the services required by the engagements they accept and b) are performing the services often enough to become proficient at them.

Firms that “dabble” in services outside their areas of expertise are typically not practicing them often enough to become proficient. Indeed, services that represent less than 15 percent of a firm's service concentration produce disproportionately high loss ratios. (See the chart, “Risk Is High for Beginners and Dabblers,” on the next page.)

Risk is High for Beginners and Dabblers

Losses by Service Concentration



Proficiency in any type of engagement includes the ability to identify risk stress points in the engagement. CPAs are expected to possess a thorough understanding of the client's business and industry in order to identify those stress points. Establish a policy for what types of engagements the firm will avoid because of a lack of technical expertise.

2) Is the client the kind of client the firm would like to have?

A variety of factors need to be considered in answering this question, ranging from the client's reputation and integrity, to its commitment to appropriate accounting practices and internal controls. CPAs should communicate with predecessor accountants and third parties to obtain as much information as possible about the client.

Are the client's expectations of CPAs reasonable? Does the client appropriately value CPAs' services and advice? Once the firm has the information it needs, it can explore ways to cultivate the kinds of business it wants.

Other important considerations will depend on the type of client or engagement in question. For some engagements, CPAs will need to consider potential or actual conflicts of interest and whether their independence and objectivity are impaired in appearance or in fact, especially when considering services for attestation clients.

3) Is the client financially viable?

The answer to this question is critical, especially in avoiding fee-collection problems and disputes. Much of the information needed can be obtained by—

- interviewing the client and the client's key personnel, banker, attorney, predecessor accountants and auditors;
- running a credit check;
- examining the past three years of financial statements;
- examining the past three years of tax returns; and
- examining the prior CPA's management letters.

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Background checks

Background checks should be considered for all significant engagements. Credit checks and public record checks are critical, but background checks are about more than the financial condition of the client. The questions the CPA firm should ask include the following:

- Why was the firm selected for this engagement?
- What was the source of the referral?
- What business is the client in?
 - » Is the engagement within the firm's areas of expertise? Is it risky?
 - » Are the rewards of the engagement worth the risk?
- Will the engagement create any conflicts of interest (actual or potential) for the firm?
- Are the business and accounting records adequate and in order, or disorganized?
- Are the financial statements and tax returns for the past three years consistent?
- What is the client's financial track record? Have there been bankruptcies or business failures?
- What is the client's level of financial sophistication (especially among its accounting staff)?
- Is there high staff turnover?
- Is a key partner or employee leaving?
- Is the client of a litigious nature, judging from conversations with prior accountants and/or attorneys?
- Is the financial knowledge of the client acute?

Regardless of the services the CPA is being asked to perform, client screening should be done during the period between the client's first contact with the CPA and the signing of the engagement letter (the "pre-engagement" period). Much of the information needed can be obtained at the client interview and verified later through other interviews. The more information obtained, the better the assessment of risk.

In a CPA partnership or professional corporation, it is a common practice for another partner or a client committee to review the client-screening information and to pass judgment on the acceptability of a new client.

There are high-risk clients and high-risk engagements. Some CPAs rank their clients according to how cooperative, knowledgeable, reasonable, difficult or time-consuming they are. Engagements can be ranked as well by the complexity of the work. Generally, difficult clients with complex work pose the highest risk to the firm, and risk management then becomes all the more essential.

To learn more about CAMICO, visit www.camico.com or call (800) 652-1772 and request to speak with a CAMICO representative.



Suzanne M. Holl, CPA, senior vice president of loss prevention services at Camico (www.camico.com), has more than 18 years of experience in Big Four public accounting and private industry. She provides Camico policyholders with information on a wide variety of loss prevention and accounting issues.

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Information Central, Information Critical: Technology Elevates the Accounting Department

By Dave Kerr, CPA, chief executive officer of Kerr Consulting

As much as technology has changed over the past two decades, one thing that hasn't changed is the desire for better, faster, more complex reporting. If information is power, then reporting is power's supply line.

When information is difficult to extract or consolidate or if rekeying data multiple times is leaving the door open for errors and inconsistencies – CFOs share the following concerns:

- "I'm afraid to admit just how much we rely on spreadsheets to run our business."
- "Accurate and timely management reporting sometimes seems impossible."
- "Our consolidations are labor-intensive, time-consuming, and error-prone."
- "We fail to bill 100 percent of time and expenses."
- "Our finance system doesn't talk to our other key applications."

Two clicks, one click, no clicks

Members of the C-Suite are typically not known for their patience. Nor should they be.

If the business is relying on dated technology (on premise ERP systems designed in the 80s) and a reliance on spreadsheets to combine information from CRM, scheduling, and timesheets with accounting data, for example, the C-Suite and other departmental leaders aren't getting the critical intelligence they need.

Any financial system can churn out the basic financial statements. But every decision-maker wants more. They want accurate, timely and detailed analyses that go far deeper for real insights into what's driving business performance.



Today's technology can deliver self-serve access to crucial, decision-making data in a matter of a couple of clicks. In fact, customizable dashboards can display user-specific information with no clicks – the dashboard is displayed when they log in and delivers real-time information throughout the day.

Best-in-class means everyone is happy

Cloud solutions are written for easy integration. In the past, tight integration was only accomplished in two ways: costly customizations or the purchase of a solution suite (accounting, CRM, HR, Payroll, and more written by the same software publisher).

Customization is always possible but very frequently cost-prohibitive. If customization was affordable, it meant that your underlying system was frozen in its current state. In the future, new versions of the software would be released but, in most cases, companies could not upgrade because of their reliance on the customizations.

The other option, purchasing a suite, usually meant that while one department would have an ideal solution, other departments would not. If the suite offered a strong manufacturing solution, the accounting system often left a lot to be desired. If the suite offered robust accounting, the CRM system fell short of being the ideal solution for the sales department.

A Best-in-Class approach means every department gets the solution that is right for them. For example, the accounting department can utilize AICPA preferred solution Sage Intacct while sales uses Salesforce.com for their CRM solution. In the nonprofit world, development can have the fundraising/donor management system they want (or school administration solutions, medical billing, online giving, member management, etc.) and integrate with financial accounting.

Not only does every department get the cloud-based solution they prefer, information from departmental solutions can be combined with accounting information and displayed through dashboards.

Modern solutions are delivering a staggering amount of management information. Cloud technology enables these solutions to be affordable and quickly deployed. This is an exciting era for CFOs -now able provide new levels of strategic value thanks to modern technology.



Dave Kerr is the founder and CEO of Kerr Consulting. Kerr Consulting is a nationwide firm that focuses on the implementation of accounting software technologies including the Sage and Microsoft offerings .



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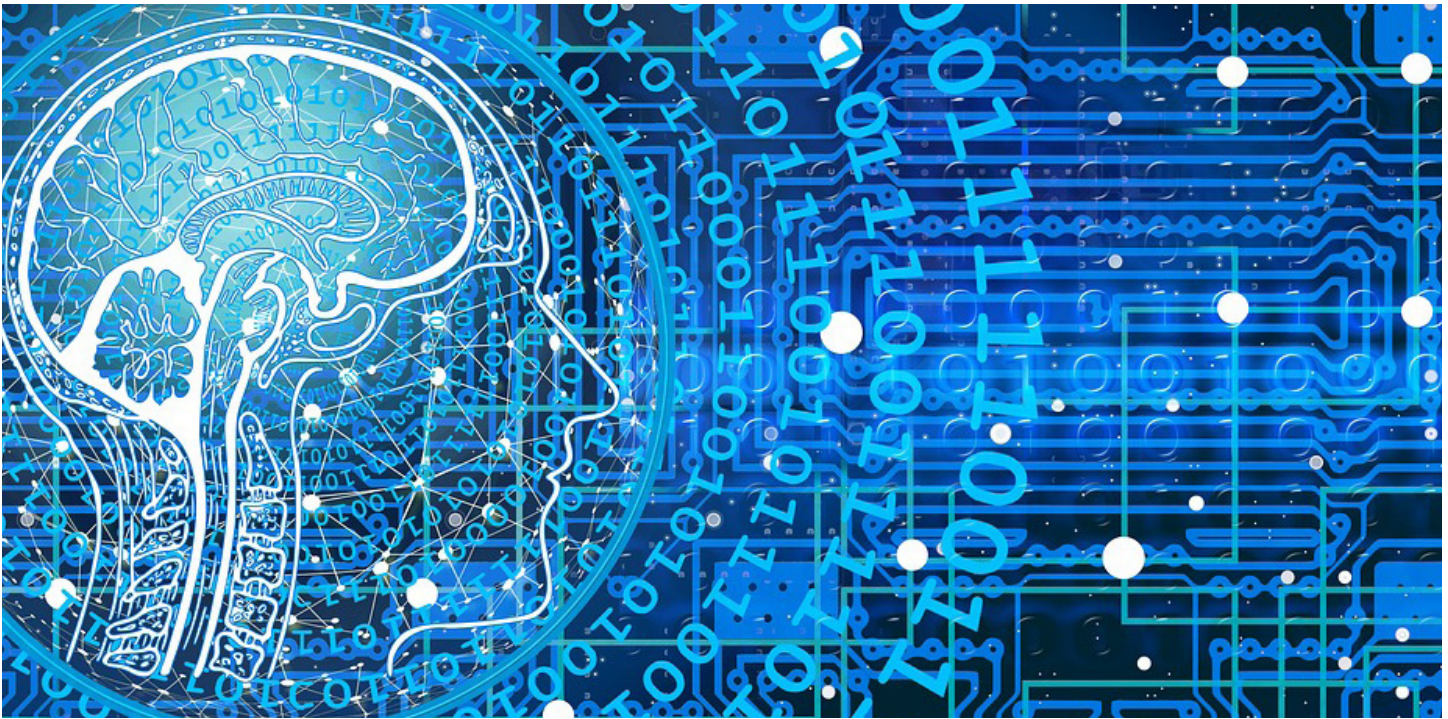
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Innovations in Audit (+Blockchain) and Tax (+Cyber)

By Donny C. Shimamoto, CPA.CITP, CGMA



Our Chapter will be the first in the nation to launch several new workshops designed specifically for non-techie accountants to get hands-on experience working with some emerging, as well as, mature technologies supporting audit and tax.

One of the biggest complaints I hear as I teach around the nation is that the technology courses are all lecture and there's no time to try the tech out when you go back to the office. Well, these workshops are designed to solve that specific problem, as we've built hands-on exercises with the actual vendor products into the class itself. These courses are also designed for the everyday accountant so you don't have to be an IT specialist to attend these courses.

Audit Efficiency and Innovation Summit: September 9 and 10, 2019

The first day will be focused on audit efficiency and the use of data preparation and analysis tools to help support the performance of an audit. This workshop is specifically designed for non-technical (non-IT) audit leaders who want to increase the efficiency of their audits by leveraging data from a client's systems.

We'll be covering a variety of tools that help with things as simple as data clean up in Excel, to full sampling and data analytics. Through a series of hands-on exercises, see what the different tools can do, and compare what it takes to do the same audit tests in different tools. Audit tool vendors will be on hand to help guide you through exercises and answer any questions about their integrations and supported platforms too.

Day 2 will be focused on practical applications of Blockchain in accounting. We'll be talking through real world use cases for Blockchain. You'll also be doing exercises using [TrueUp's](#) gamified workplace simulations and an actual Oracle Blockchain. Come and learn with your fellow Blockchain newbies about how blockchain can be used to automate accounting transactions, provide information transparency, and how you can also audit the data from a blockchain ledger—all of which can be done without an IT background!

Join us for just one day ([Audit Efficiency](#) or [Blockchain](#)) or both days , and be the first to experience this great interactive way to learn more about the technologies impacting accounting and auditing.

Tax Innovation and Cyber Summit: November 12, 2019 ([register here](#))

We're jam packing both innovation and cyber into this one day event designed specifically for tax practitioners. We'll start off the morning not just talking through, but actually working through the best practices for automating tax workflow. Walk through standardizing your tax return preparation process and then try out different vendor tools that support workflow automation. If you like what you see, you could even potentially just use what you created when you go back to your firm by purchasing a full subscription to the tool.

Get a preview of this portion of the summit by attending one of our webinars on 8 Keys to Tax Automation and Outsourcing, offered twice: **[September 24, 1:30 p.m. – 2:20 p.m.](#)** and **[October 30, 1:30 p.m. – 2:20 p.m.](#)** Attend a webinar to also get a discount on attending the Summit.

In the afternoon we'll flip to the other side of innovation and look at the risks associated with cybersecurity and data privacy, and specifically look at options for how you can ensure you are complying with IRS Publication 4557: Safeguarding Taxpayer Data. As we walk through the requirements, we'll guide you through a self-evaluation of your own safeguards and help you to identify the questions to ask your IT service provider to ensure that you have the appropriate protections in place. You'll be able to leave this workshop with a good action plan for ensuring that you have your clients' data protected—or know what to do to improve that protection.

Get a preview of what is required under IRS Publication 4557 by attending one of our webinars on "What the IRS Expects Tax Practitioners to Do to Safeguard Taxpayer Data", offered twice: **[September 25, 1:30 p.m. – 2:20 p.m.](#)** and **[October 31, 1:30 p.m. – 2:20 p.m.](#)** Attend a webinar to also get a discount on attending the Summit.

Immediately Apply Your Learning in Busy Season

We've also planned the timing of these courses so that you have enough time to figure out how you can incorporate these into your processes and procedures for busy season. The audit efficiency tools can be used to support planning and controls assessments, as well as substantive testing. Tax workflow will be essential to making the tax season less stressful, and you'll also want to ensure that your firm is secure BEFORE you go into busy season.

If you have any questions about the courses or the technologies that will be utilized in the workshops, please contact TXCPA Houston at cpe@houstoncpa.org. I also welcome your ideas for other innovative or different workshops that can help enhance our profession—let me know what you'd like to see!



Donny C. Shimamoto, CPA.CITP, CGMA is the Director of Innovation at TXCPA Houston. Donny has been recognized as one of the Top 100 Most Influential People in Accounting and Top 25 Thought Leaders in Public Accounting. He is responsible for facilitating innovation and changes to the chapter's programs and operations.

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Chapter News

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CPAs Helping Schools

By Carol Spencer

CPAs Helping Schools (CHS) is recognized by members of the TXCPA Houston, and the members of the education community as a positive force in education, and as a group that can be relied upon to support and encourage worthwhile education endeavors. CHS promotes academic excellence by meeting schools' needs through a variety of creative ways and devotes most of our efforts to schools in need.

CHS works closely with our local districts, partnering with them in special programs that provide an opportunity for CPAs to become involved in a nearby school. Volunteers are needed throughout the year for activities including:

- Serve as program judges for campus programs or those of students organizations such as Business Professionals of America or Future Business Leaders of America
- Speak to students at career day activities. We provide PowerPoint Presentations and training;
- TXCPA often provides brochures, pens and other information for age-specific accounting career discussions.
- Assist local high school students and their parents in completing applications for Federal or State Financial Aid;
- Regularly participate in local schools as readers to younger students;
- Deliver our grant checks to local schools;
- Visit schools to see the funded programs in action and report to the committee;
- Plan and promote our Fall FUNdraiser;
- Research and review available grant opportunities from foundations and corporations;

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CPAs Helping Schools Program

CPAs Helping Schools provides funding to local districts for educational projects, emphasizing aid to economically disadvantaged schools. The committee reviews grant applications in the fall and spring semesters and distributes the funds at a reception with districts' Partners in Education in February and August. Up to \$5,000 in funds per school per year is available for educational programs in grades PreK-12 in any school within the thirteen-county membership area of the TXCPA Houston. Schools that do not receive their requested funds may reply for consideration at future review periods.

Since 2002, CPAs Helping Schools has reviewed over 500 grant applications, awarding funding in excess of \$456,000 to over 200 schools in 35 local districts, private and parochial schools and nonprofit educational organizations. In addition to providing education basics for at-risk youth, the financial support of CHS continues to provide math manipulatives and technology programs, literacy programs and library improvements, and science materials. Funding also provides resources for after school and fine art programs and health awareness. In the past two years, CHS has assisted several local schools in their struggles to bring their library nonfiction section up to



proper state standards. A significant number of grant funds provide updated classroom library sets or take-home readers for those students without access to books at home.

CPAs Helping Schools, in cooperation with our community services initiative, assists local schools and 501(c)3 organizations with auction assistance at their fundraising events. Community Services Auction Database, using Access, is available free of charge to organizations for their use, or the chapter will provide volunteers to assist with database entries of attendees and auction items. Volunteers attend the event to finalize the winning bids and provide the needed paperwork for checkout processes.

Tomorrow's leaders need your generous donation of time and money to help them reach the educational levels necessary to succeed in our ever-changing world.



If you wish to donate to CPAs Helping Schools, there are several ways:

- JustGive.org <https://npo.justgive.org/hcpas> and mark the donation for CPAs Helping Schools
- Mail a check to 777 Post Oak Blvd, Suite 500/ Houston, TX 77056
- Annual TXCPA Dues Invoice – up to \$10 of your voluntary contribution to “Chapter Scholarships/Helping Schools” will be directed to CPAs Helping Schools.
- Phone 713.622.7733 to use your credit card for a donation
- Annual Fall FUNdraiser will be a Topgolf Challenge on Monday, November 4, 2019. Get your team together and submit your entry for an evening of fun and camaraderie! Various sponsorship levels are available. Individual players are \$100 or you can sponsor a “Tee-cher” for \$100.
- Annual Scholarship Extravaganza: make a dedicated donation to CPAs Helping Schools.

If you would like to make a financial contribution, volunteer with the committee, become involved in a local school, speak to students about your accounting career, or learn more about our grant program for schools, contact Carol Spencer (cspencer@houstoncpa.org, 713.622.7733 ext.320)

Remember the CHS motto, “if you are a CPA, you can help a school”.



Carol Spencer is the Membership Manager at TXCPA Houston.

What is a CPA financial planner?

By Ryan Firth, CPA, president of Mercer Street Personal Financial Services



Traditionally, when one was considering a career in public accounting there were two options: audit or tax. You either performed some form of attest work or you did tax compliance work.

Today, being a CPA can mean more than performing audits or doing tax compliance work. Indeed, in [section 901.256. "Work Experience Requirements" of the Texas State Board of Public Accountancy's act, effective September 1, 2015](#), it recognizes that "providing a service or advice involving accounting, attest services, management or financial advisory or consulting services, tax services, or other services the board considers appropriate for an accountant" may, at the board's discretion, count toward the experience requirement in order to receive a CPA license in the state of Texas for first time licensees.

One fast-growing line of work for CPAs is personal financial planning. Personal financial planning entails working with clients on their personal finances on topics such as estate planning, investment planning, insurance and risk management, retirement planning, and tax planning. According to [PayScale, professionals](#)

[with an accounting degree earn more on average than any other business school major, and professionals who engage in personal financial planning \(a.k.a., financial advising\) report the highest levels of job meaningfulness.](#)

Here's an interesting fact about CPAs: they are the only regulated financial planners. CPAs have been trusted financial advisers to clients for well over 100 years. A founding principle of the American Institute of Certified Public Accountants (AICPA) Code of Professional Conduct is "always acting in the best interest of the client." Additionally, all CPAs who are members of the AICPA and who practice personal financial planning are held to "[Statement on Standards in Personal Financial Planning Services \(SSPFPS\)](#)." The SSPFPS provides a framework for CPAs who provide personal financial planning (PFP) services. In particular, it gives CPAs guidance on:

- General professional responsibilities
- Responsibilities of members in PFP engagements
- Planning the PFP engagement

- Obtaining and analyzing information
- Developing and communicating recommendations
- Implementation engagements
- Monitoring and updating engagements
- Working with other service providers
- Using advice provided by other service providers

CPAs with a strong background in individual and small business taxation who are personable and good listeners typically excel as CPA financial planners. CPAs with an audit and/or accounting background are well-positioned to excel as financial planners, too, but may want to focus on gaining more exposure to tax-related topics through continuing professional education and/or hands-on tax compliance experience. Those CPAs who wish to further distinguish themselves as CPA financial planners should consider obtaining the [AICPA's Personal Financial Specialist \(PFS\) designation](#), or other comparable designation.

The accounting profession is changing. It's not just about audit or tax anymore. Careers in personal financial planning are growing, and will continue to grow over the coming years. Being a CPA financial planner can be one of the most gratifying careers one can pursue in the fields of accounting or finance.

If you'd like to learn more about a career as a CPA financial planner, please join us at the TXCPA Houston office on Thursday, September 19th at 4:00 p.m. for a panel discussion on careers in financial planning, presented by TXCPA Houston's Personal Financial Planning Committee. Registration and event details are available on www.houstoncpa.org. Or, email cs pencer@houstoncpa.org for more information.



Ryan Firth is the founder and president of [Mercer Street Personal Financial Services](#), an independent Registered Investment Adviser (RIA) firm based in Houston, Texas. Mercer Street serves small business owners, young professionals, and growing families in the wealth building phase of their lives. Find us @MercerStreetCo.

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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2019 ENERGY CONFERENCE

Marriott Marquis Houston

August 28 • 7:30 a.m. - 5:30 p.m

Attend the TXCPA Houston 2019 Energy Conference on Wednesday, August 28 at the Marriott Marquis. As the premier conference for accounting professionals in the energy industry, hear from thought leaders who will discuss mergers and acquisitions, technology, E&P and much more. Our keynote luncheon speaker is **Mark McCollum, CEO of Weatherford**, who will discuss oilfield services outlook and trends. Our Sips & CPE speaker is **Scott McClelland, president of H-E-B**. You'll find all of their insights invaluable!

	Regular (August 1-16)	Late/Walk-in (August 17-28)
Member/Non-CPA or other chapter member:	\$275	\$300
Non Member:	\$375	\$400

Topics will include:

- Energy Economic Update and Outlook
- Tax Reform
- Accounting/SEC Update
- Foreign Corrupt Practices Act - Mitigating Corruption Risks
- Mergers and Acquisitions, and Capital Markets Insights and Trends
- Practical Artificial Intelligence (AI) – Reality and Risks for Business

CPE Credit: up to 10 hours (Credit hours are proposed and can change prior to the conference. Please refer to onsite event program the day of for actual hours.)

[REGISTER TODAY: WWW.HOUSTONCPA.ORG](http://WWW.HOUSTONCPA.ORG)

Chapter News

UPCOMING CPE COURSES Register at www.houstoncpa.org

CPE COURSES

TXCPA Houston Society Learning Center

Business Valuation Basics

- 4 CPE hours

August 20, 2019 • 12:15 p.m. - 4:35 p.m.

[Register Here](#)

In-person Ethics Course

- 4 CPE hours

Deanna Sullivan, CPA, CGMA

August 30, 2019 • 12:30 p.m. - 4:15 p.m.

[Register Here](#)

How Accountants Can Leverage Blockchain: A Hands-on Workshop for Blockchain Beginners

- 8 CPE hours

Donny Shimamoto, CPA.CITP, CGMA

September 9, 2019 • 8:30 a.m. - 4:30 p.m.

[Register Here](#)

Audit Efficiency Workshop: A Hands-on Introduction to Audit Automation Tools

- 8 CPE hours

Donny Shimamoto, CPA.CITP, CGMA

September 10, 2019 • 8:30 a.m. - 4:30 p.m.

[Register Here](#)

In-person Ethics Course

- 4 CPE hours

Deanna Sullivan, CPA, CGMA

September 27, 2019 • 12:30 p.m. - 4:15 p.m.

[Register Here](#)

2019 NORTHWEST CPA BUSINESS ROUNDTABLE DISCUSSION GROUP

Los Cucos, 22390 Tomball Pkwy.

199A - 3 CPE hours

Nick Millar, BKD

August 22, 2019 • 2:30 p.m. - 5:00 p.m.

[Register Here](#)

Employment Issues - 3 CPE hours

Speaker: TBD

September 19, 2019 • 2:30 p.m. - 5:00 p.m.

[Register Here](#)

Chapter News

UPCOMING EVENTS Register at www.houstoncpa.org

NETWORKING EVENTS

Energy Lunch & Learn

La Madeleine Town & Country Village
August 14, 2019 • 12:00 p.m. - 1:30 p.m.

[RSVP Here](#)

Goodman Financial 30th Anniversary

Happy Hour

Le Colonial
August 15, 2019 • 5:00 p.m. - 7:00 p.m.

[RSVP Here](#)

Morning Buzz + CPE

Los Cucos, 22390 Tomball Pkwy.
August 22, 2019 • 7:00 a.m. - 9:00 a.m.
(Includes one free CPE)

[RSVP Here](#)

FSP Houston & TXCPA Houston

Happy Hour

Sponsored by AvTek Solutions, Inc.

The Tasting Room at Uptown Park
August 22, 2019 • 5:30 p.m. - 7:30 p.m.

[RSVP Here](#)

SAVE THE DATE

Happy Hour

TBD, Galleria area
September 5, 2019

Lunch & Learn

TBD, Northwest area
September 11, 2019

Morning Buzz

TBD, Sugar Land area
September 19, 2019

Chapter News

UPCOMING CONFERENCES Register at www.houstoncpa.org

CONFERENCES

Energy Conference

August 28

Marriott Marquis Houston

Seasoned energy professionals and executives address the significant current issues affecting the energy industries as well as the accounting processes. For more information and to register, visit the [Energy Conference page](#).

CFO/Controllers Conference

September 26

Sugar Land Marriott

A one-day conference caters to the financial leaders of small to midsize companies. Register [here](#).

Personal Financial Planning/Medicare

October 28 -29

TXCPA Houston Learning Center

Day 1: Medicare/Medicaid Workshops

With 10,000 people turning 65 every day, it is important to understand the financial benefits offered to older clients.

Day 2: Personal Financial Planning

Learn about personal financial planning strategies at the only PFP conference for CPAs in the state. Register [here](#).

SAVE THE DATE

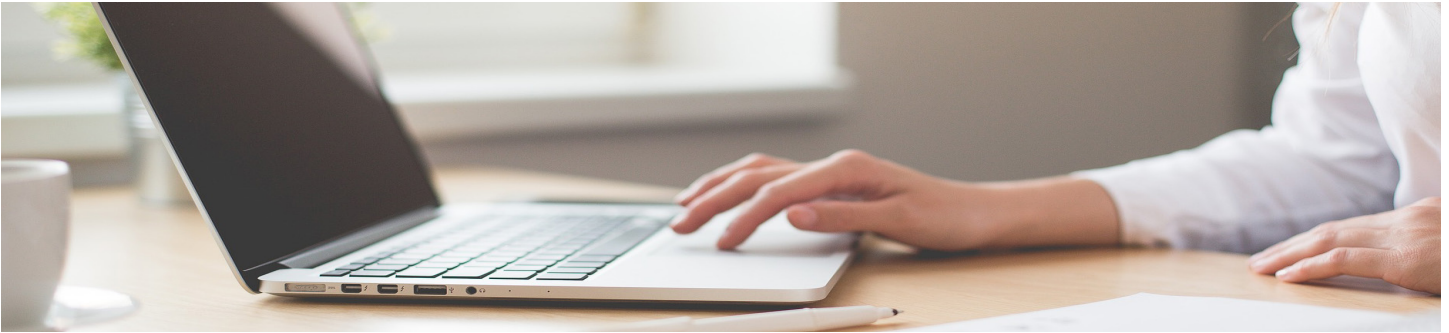
Tax Expo

January 6-7

Sugar Land Marriott Hotel

This two-day conference offers topics that range from international and federal taxation to all IRS form updates.

Chapter News



UPCOMING WEBINARS

Eight Keys to Tax Automation

Date: September 24

Time: 1:30 p.m. - 2:20 p.m.

Location: Online

CPE: 1 hours

Prerequisite: None

Level of Instruction: Overview

Instructor: Donny Shimamoto, CPA.CITP, CGMA

Tax season seems to be getting worse every year. Last minute changes to the tax code, delayed tax software updates, workload compression and a shortage of experienced tax professionals continue to exacerbate what is already a grueling season for many accounting firms. Client fee pressures are forcing firms to figure out how to get more productivity out of their existing staff while not burning staff out and while still maintaining a high level of staff engagement. Yet some firms have been showing strong growth and even increased work-life balance. We interviewed a variety of these firms to see if we could identify the secret to their success. Attend this webinar to learn how these firms are bucking the general trends and achieving growth and increased profitability.

Cost: Member \$59 Non-Member \$99

[**REGISTER HERE**](#)

Cybersecurity for Small Tax Firms

Date: September 25

Time: 1:30 p.m. - 2:45 p.m.

Location: Online

CPE: 1.5 hours

Prerequisite: None

Level of Instruction: Overview

Instructor: Donny Shimamoto, CPA.CITP, CGMA

The growing risk of tax identity theft and increase in hackers targeting firms offering tax services makes it even more important for tax practitioners to revisit their cybersecurity/information security policies and procedures. Attend this non-technical seminar to obtain an understanding of the IRS's expectations of you in safeguarding your clients' data (Pub 4557) and practical tips to reduce your risk of a data breach.

Cost: Member \$59 Non-Member \$99

[**REGISTER HERE**](#)

For more information, email cpe@houstoncpa.org.



Connecting Future Leaders

2019 Schedule

Date	Time	Event	Instructor	Topic
10/23	5:30 – 7:00 PM	Networking Reception		
10/24	7:30 – 10:30 AM	Session 1	Mike Goodfriend	Personality and Self-awareness; Review of Birkman Assessment (to create understanding of self)
10/31	7:30 – 10:30 AM	Session 2	Deanna Sullivan	Effective Communications (create understanding of how to effectively communicate)
11/07	7:30 – 10:30 AM	Session 3	Jamie Belinne	Conflict Management (create understanding of how to prevent conflict with others)
11/14	7:30 – 10:30 AM	Session 4	Donny Shimamoto	Team Performance (create understanding of the role of personality and communication on team performance)
11/21	6:30 – 8:30 PM	Dinner	Roundtable Discussion	

In 2013 the TXCPA Houston developed a four-week professional development and networking program to enhance the critical skills necessary to be effective within your professions and communities. The 2019 program has been redesigned to center around executive leadership competencies of self-awareness, self-management, social awareness, and relationship management.

Accelerate "Connecting Future Leaders" Professional Development & Networking Program

Cost: \$495

CPE Credit: 12 Hours (three hours per classroom instruction)

Class Size: Limited to 20 current and future leaders of the Accounting profession

Who can participate:

- Certified Public Accountants, with at least six years of post-graduate, full-time work experience in public accounting or industry.
- CPA participants should be a current member in good standing of TXCPA Houston.
- Non-CPAs with a minimum of six years of post-graduate, full-time work experience may also apply.

Program Alumni Benefits include:

- Inclusion in an alumni directory that all alumni members will receive after each session (listing to include name, company, and email address)
- Access to a private, alumni-only LinkedIn sub-group
- Invitation to periodic, alumni-only events
- Enhanced exposure to leadership opportunities at area not-for-profits, including TXCPA and TXCPA Houston.

For more detailed information on this newly revised program, contact Membership Manager Carol Spencer (cspencer@houstoncpa.org; 713.622.7733 x320).



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!

TXCPA Houston members have a multitude of committees and tasks forces. Please check your top three committee(s) based on interest.

Name: _____

Business: _____

Email: _____

Phone: _____

Address: _____

CPE Related Committees

Quality control and oversight of Society CPE

- _____ CFO/ Controllers Conference
- _____ CPE
- _____ 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

Professional Services Committees

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

- _____ Accounting & Auditing
- _____ Forensic & Valuation Services
- _____ Personal Financial Planning
- _____ Circular 230 RoundTable

Charity/Civic Related Committees

Sponsor community and organization events.

- _____ Accounting Scholarship Endowment
- _____ Accounting Scholarships
- _____ Community Service
- _____ 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.



Your Values. Your Influence. Your Legacy.

Our Advice.

From left: Shelitha Smodic, Maureen Phillips, Tom Williams, Leah Bennett, Donnie Roberts, Susan Wedelich, Katie Slater



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Chapter News

CONGRATULATIONS TO THE AWARD WINNERS

On May 30, TXCPA Houston celebrated members hard work and dedication to the profession. Scholarships were also awarded to accounting students from nine area universities.

Royal Sonesta



Mohan Kuruvilla pictured with TrueUp Bot Challenge winners Hongfeng Zhu, Jordan Diemer, Sara Sharma, Logan Welsch and Christine Nguyen (not pictured) who received local first place award for their chatbot "Pann".



Kevin Ly received Outstanding Student Member.



Danielle Supkis Cheek receiving Distinguished Member Award from our emcee Khambrel Marshall.

Chapter News

NABA ACAP



Left - Right: Kristie Wells-Ondracek, Carol Spencer, Rubik Yeriazarian, Ryan Firth, Ramsey Womack, Kelley Lau, Kenneth Omoruyi, Jim Stinson, Felicia Farrar, Candice Elliott, and the NABA ACAP students.

TXCPA Houston

On Wednesday, July 17th members shared their accounting profession insights with high school students participating in the NABA Houston ACAP program.



Through ACAP's efforts, students receive educational enrichment experiences and practical help needed for college preparation and a career in accounting.

Chapter News

SPONSORSHIP OPPORTUNITIES

CPAs play an integral role in their company's important decision-making process. Becoming a sponsor is a great way to engage these influential accounting professionals. There are many upcoming events for you to take advantage of.

Sponsorship benefits vary and levels start at \$500. If you are interested in becoming a sponsor for an upcoming event contact Matt Boyd at cpe@houstoncpa.org.

Please welcome our new strategic corporate sponsor, **Creative Financial Staffing!**



LET'S WORK TOGETHER.

At Goodman Financial, we speak your language. While tax and accounting services are your specialty, we focus solely on financial advisory and investment management. As fee-only fiduciaries, we provide these services in a tax-efficient manner, in coordination with our clients' CPAs. Our goal is to work with you in serving your clients.

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Chapter News

CALL FOR VOLUNTEERS!

Volunteers are needed this year to enhance the member experience.

Membership Development Committee has new working groups to plan networking events, CPE programs, and outreach to new and current members.

Time commitment varies, and meeting times are flexible.

Please contact Membership Manager Carol Spencer, cspencer@houstoncpa.org, 932-831-9232 for more details.

CLASSIFIEDS

PRACTICES FOR SALE: Gross revenues shown: League City Area CPA \$1.8MM; Kingwood Humble Area CPA \$950K; North Houston Area CPA \$825K; The Spring/Woodlands Area CPA \$740K, \$441K & EA \$300K; Brazos Valley Area CPA \$640K; Greenway-Galleria Area CPA \$540K; Beaumont Port Arthur Area CPA \$580K; SE Texas CPA \$311K; West Houston CPA \$200K. Call 888-847-1040 or email Holmes@APS.net

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Member News



Danielle Supkis Cheek named one of 2019's Most Powerful Women in Accounting

On June 26, Pannell Kerr Forster of Texas, PC (PKF Texas) Director, Danielle Supkis Cheek, CPA, CFE, CVA was named one of 2019's Most Powerful Women in Accounting by the American Institute of Certified Public Accountants (AICPA) and CPA Practice Advisor magazine.

Supkis Cheek was one of 25 women honored at the AICPA Engage Conference in Las Vegas, Nev. This is the eighth year CPA Practice Advisor and AICPA have presented this award, and this will be Supkis Cheek's fourth time to be recognized.

"Danielle has not only influenced the accounting profession, but also those who have the privilege of working with her," said Byron Hebert, CPA, CTP, Entrepreneurial Advisory Services Practice Leader and Chief Growth Officer. "We are honored to have one of our Directors recognized for their hard work.

PKF Texas is proud to have Danielle on our team, and we look forward to her continued success in the profession."

Most recently, Supkis Cheek was named Chair of the AICPA Technical Issues Committee (TIC), representing the views of local firms and their clients in the standards-setting process. Her multi-year term as Chair started on May 26, 2019.

"It's an honor to be a role model for women as they develop in their careers in an ever-evolving industry," said Supkis Cheek. "The future of accounting is rapidly changing, and I'm looking forward to continue making an impact within the industry."

TXCPA Houston is proud of Danielle Supkis Cheek's achievements and grateful for her contributions as an active member.

Member News

Weaver Names New Strategy Leaders to Build Nationwide Presence

The accounting firm Weaver, one of the 40 largest Certified Public Accounting firms in the United States, announced on June 27, 2019 that it has named two new national strategy leaders to raise the firm's profile and expand its presence in markets coast to coast.

Alyssa Martin, CPA, is the new national strategy leader, large market and public entities. She will work with partners firmwide to grow Weaver's public company client base with a multi-disciplinary approach and expand our services to large markets. She will work with firm leadership to identify new service offerings and innovate products to expand advisory and tax services. She will also work with the firm's respected government practice to extend its services to New York, California and other states, and expand into federal government.

Melvin F. "Trey" Hunt III, CPA, will drive growth with key private equity firms and middle market prospects as Weaver's national strategy leader, middle market and private equity. His goal is to improve the firm's visibility in this segment across all markets and industries; he will also help identify new talent and opportunities in selected target markets.

In addition, Kevin Sanford, CPA, will continue leading services in the alternative investment industry under the title of national strategy leader, financial services.

CEO and Managing Partner John Mackel, CPA, said of these new roles, "Weaver has always been progressive in expanding our service offerings and investing in new industries and geographic locations. Now, it is more important than ever to expand and innovate our services for clients nationwide. I'm excited for Alyssa, Kevin and Trey to work with our partner group to develop new opportunities and drive innovation."

Congratulations these TXCPA Houston members on their new strategy leadership roles at Weaver!



Alyssa Martin, CPA, new national strategy leader, large market and public entities



Melvin F. "Trey" Hunt III, CPA, new national strategy leader, middle market and private equity



Kevin Sanford, CPA, national strategy leader, financial services

Nonprofit Assistance Program

We Need Your Experience!

One of Houston CPA Society's charges is to assist not-for-profit organizations that need the assistance of a CPA but are unable to afford it. We match volunteer CPAs with organizations on a SINGLE PROJECT BASIS only, not for on-going services such as routine accounting. Volunteer CPAs are not asked to provide annual audits. We need YOU to be a volunteer and experience the satisfaction of helping a worthwhile cause!

By signing up to be a part of the program, we will add you to our volunteer pool and may call on you if a need arises in an area you have indicated. You may decline to accept any request.

Yes...I am willing to participate in the Community Services Volunteer Program, if needed, and may be able to provide assistance in the area(s) indicated below:

ACE:

- ☐ Educate young professionals on career development and financial literacy

TAX:

- ☐ Application for exempt status under 501(c)(3) (Preparation of Form 1023)
☐ Preparation of tax returns and/or annual 990s

ACCOUNTING/FINANCIAL REPORTING:

- ☐ Accounting policies and procedures
☐ Financial reporting policies and procedures
☐ General ledger set up consulting
☐ Assist with the preparation of client-prepared audit schedules

OTHER AREAS:

- ☐ Silent Auction Management Assistance
☐ Please specify

Name _____ Employer _____

Address _____ City _____ Zip _____

Daytime Phone: _____ Email: _____

Do you have prior experience with nonprofits? (Experience is not required to be a part of this program.) If so, please describe: _____

Do you have restrictions or strong preferences on the geographic area of Houston where you will volunteer?

Do you have restrictions or strong preferences on the type of charity you will volunteer for?

STUDENT AUXILIARY

The TXCPA Houston Student Auxiliary provides career training, career path options and information, networking, and hiring opportunities for students in the Houston area interested in Accounting.

REASONS TO JOIN TXCPA HOUSTON:

- Networking with Houston's most prominent CPAs
- Getting involved with your future profession
- TXCPA Houston gives scholarships every year
- You can join at TSCPA.org for just \$35 per year

JOIN US FOR THE 2019-20 STUDENT AUXILIARY FALL EVENTS:

TXCPA Houston— 777 Post Oak Blvd.
Suite 500 Houston TX 77056

- | | |
|------------------|--|
| 5:30 – 6:30 p.m. | Check-in; snacks; and mingling with other students |
| 6:30 – 8:00 p.m. | Presentation |
| 8:00 – 8:30 p.m. | Additional networking time with students and professionals |

SAVE THE DATE!

Friday, September 6
Friday, September 20
Friday, October 4

Schedule dates and topics are subject to change.

TXCPA HOUSTON



For more information: call 713.622.7733 or email students@houstoncpa.org.



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