

December 2020/January 2021

FORUM

TXCPA Houston

WE GIVE
To Make A Difference

TOP 3 FINANCE TECHNOLOGY
FOCUS AREAS IN 2021

READY TO BE A HEALTHIER
HUMAN IN 2021

ONE STRATEGY FOR A MORE
PRODUCTIVE YOU IN 2021



Darrell Groves,
CPA, CFE, CGMA
President

from the desk of _____

Anne Frank said it best - "No one has ever become poor by giving." As we begin this period with [Giving Tuesday](#) on December 1, we are reminded that it is in giving of ourselves and our spirit that we receive. TXCPA and our chapter are highlighting several opportunities for you to give of your time, talent and treasure over the next couple months including contributing to our CPAs Helping Schools program, a statewide focus on financial literacy education, and service campaign and for our annual scholarship fundraising event. Please consider these as you seek to expand your impact on the lives of others as 2020 comes to a close and we kick off a new year. Remember, your tax-deductible contributions are welcomed year-round.

Speaking of the new year, we look forward to seeing many of you virtually at our Houston chapter Annual Business Meeting on Wednesday, January 20. In addition to the presentation of our slate of candidates for leadership positions in the upcoming year, we will also provide a presentation of our updated strategic plan that will guide us through 2024. Our overriding principle in updating our long-term plan was to align our chapter as much as possible with the TXCPA statewide organization to achieve the maximum value and benefits for our members. Most importantly, we hope that you will join us at our annual meeting to provide feedback on your experience as a member and to share your thoughts on our direction for the future.

Finally, I would like to encourage your participation in the year-end TXCPA CPA-PAC challenge. Thanks to [CPA-PAC](#) donors:

- CPA firms must have at least 50% CPA ownership;
- the Board of Accountancy will continue for another decade;
- retired CPAs are exempt from the fingerprinting requirement;
- there is no sales tax on accounting services; and
- the prior \$200 annual professional license service fee of the state board was eliminated.

All CPAs benefit from the hard work and financial support of CPA-PAC donors; their contributions are what keep the profession strong in Texas. If you would like to have a taste of the effectiveness of our members in action, please mark your calendars to attend the TXCPA Advocacy Day on January 26 from 9:00 a.m. – noon followed by virtual legislative visits from noon – 3:00 p.m.

As Mahatma Gandhi said, "The best way to find yourself is to lose yourself in the service of others." 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 mother of a two-year-old girl hospitalized in Los Angeles for cancer treatment thought she'd lighten the mood by spelling out "Send Pizza" on the window with masking tape. Within minutes, more than 20 pizzas arrived at the hospital. A woman in a Utah bridal store left payment for a stranger's wedding gown after overhearing her say she had to choose between the gown she loved most and having flowers at her wedding. In Boston, an elderly widow dropped her \$1,800 engagement ring and wedding band into a Salvation Army kettle with a note saying she was donating the jewelry in honor of her husband's memory in hope that it would help someone start a happy life like the one she had enjoyed.

The great thing about giving is it feels great. People often give items to others that have meaning or give pleasure to them. Love pizza? Send a pizza to someone who's having a hard day. Have fond memories of your fairytale wedding? Buy a fairytale gown for someone who's dreaming of her big day.

Winston Churchill once said, "We make a living by what we get. We make a life by what we give." If that's true, then TXCPA Houston members have great lives because they have a long history of giving back. For instance, TXCPA Houston scholarships have eased the burden for hundreds of accounting students. In fact, a recipient of a 2020 scholarship told us his award saved him from dropping out of school due to financial hardship. TXCPA Houston members have also generously supported CPAs Helping Schools which provides teachers with equipment and resources to deliver quality educational experiences for children. As a bonus, it also plants a seed in students' minds that CPAs aren't a bad bunch of people to be among when it's time to select a profession.

Sometimes an act of giving has tangible benefits for the giver. And that's okay! Take the CPA-PAC for instance. TXCPA Houston members have dug deep into their pockets to support state and local efforts to protect CPAs from legislation that threatens its licensing status, imposes unnecessary regulations, and adds burdensome expenses to their operations. The CPA-PAC Steering Committee is led by unsung heroes who keep their eyes on the interests of CPAs.

Now is a great time to give to the CPA-PAC. Houston is competing with other TXCPA chapters to see which one can raise the most money as a percentage of its membership. [Click here](#) to submit your donation by **December 31**. I hear that TXCPA Dallas is doing very well. We don't want to be outdone by Dallas, do we?

TXCPA HOUSTON

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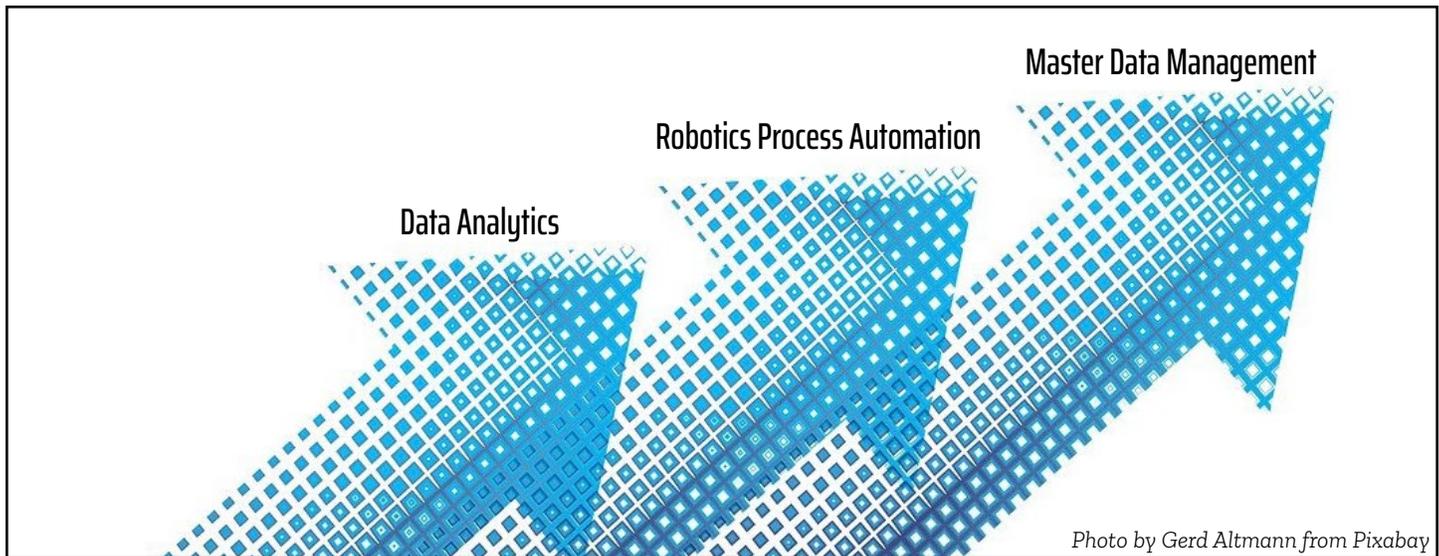
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Top 3 Finance Technology Focus Areas in 2021

By Denise Sanders, CPA, CISA, PMP



You likely have heard or read about technology trends that will reshape Finance and Accounting over the next ten years, like Big data, RPA (Robotics Process Automation), AI (artificial intelligence), blockchain, IoT (internet of things). Much attention is given to what they are, but you may not know how to utilize them in Finance and Accounting, leaving you with a concern that you are behind the times and have no clear path forward. These technologies will someday transform business, but which ones will directly impact Finance and Accounting professionals near term? Not all will show up in your organization as standalone products, instead, they will be built into software you will, or already licensed. Also, many will be used by departments across your company, whose data feeds into Finance and your ERP.

Here are my top picks for where you should focus your Finance technology efforts in 2021.

1. Data Analytics

Data Analytics is the process of examining and organizing data to develop meaningful information and decision-making insight. Data Analytics software has been available for years, but recent developments have significantly improved its capabilities. In fact, if you have not evaluated software solutions for a few years, you might find that some providers made great strides, and some previous leaders have fallen behind the pack.

Developments that have improved data analytics capability include Big data, blockchain, IoT, and AI, improving the capture, availability, and analysis of data.

Data availability:

- **Big data** – large volume of data including structured and unstructured data (not in database tables)
- **Blockchain** – set of records (blocks), protected by cryptography, from transactions that can be added to by multiple parties.
- **IoT** (Internet of Things) – connection of various devices (things) via the internet to gather data, for example, tablets, smartphones, control systems, smart home systems, etc.
- **In-memory column-based database** – Databases utilized in newer versions of ERP systems and other applications which significantly accelerates data access by analytics tools

Newer capabilities of analytics software:

- **AI** (Artificial Intelligent) and **ML** (Machine Learning) – Used to create **augmented analytics**, i.e. explanations of underlying relationships of data
- **Nature language processing** – allows users to ask a question via text box or spoken without having to utilize a query code, or for the

analytics system to create data storytelling and let the user interact with the data or visualization

- **Built-in integrations** – Easier plug and play type connection to ERP or other common enterprise systems

Major ERP vendors have Analytics solutions that are taking advantage of these features like SAP Analytics Cloud, and Oracle Analytics Cloud. Other products include Anaplan, Tableau, Tibco Spotfire.

How do you know if you need better data analytics?

- The Finance team spends a significant amount of time creating reports, and self-service reporting is not common.
- The bulk of reporting is performed monthly or quarterly, instead of daily or real-time.
- Information produced is out-of-date by the time it is "published."

According to Gartner, Inc., a research and advisory firm, 73% of Finance organizations face pressure to speed up, and there has been a 50% increase in the finance spend on analytics over the past three years. Unfortunately, many of these investments have not delivered on their promises. Reasons include: buying or developing multiple software

solutions, each for a specific need or business unit instead of taking an enterprise wide view, and not developing the infrastructure, governance and processes for data.

2. RPA

Robotics Process Automation (RPA) is the use of a "bot" which is a program designed to perform a task that can follow rules-based instructions. The tasks can involve almost any system, web, email, and move between systems/tools. RPA can speed some processes that currently take days to one which only takes seconds. Repetitive, time-consuming tasks can be performed by a bot.

How is this different from other software and automation? Some of the things a bot could do can also be performed with the technology you already have. For instance, moving data from one system to another would often be built into an interface. Other bot needs could instead be met by coding a program or implementing a software package. These solutions can take much more time and much more IT staff or consultants to implement than creating a bot. Some packaged software you may buy can include RPA, machine learning, or AI components. The decision to utilize RPA, a software that incorporates RPA, or a traditional software takes some evaluation of the process, including what controls are needed, how often the

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process might change, the systems involved, and the amount of complexity.

How do I use bots in accounting? Some use cases include:

- Accounts Payable Automation – RPA with machine learning is being used to take invoices from a website or email and scan them with OCR (Optical Character Recognition) technology. Then, utilizing machine learning, identify the needed information in the various vendor formats, and input this data into your ERP system.
- Data Handling – For instance, pulling information from a website, incorporating it into a spreadsheet for calculations, then inputting the results into a journal entry.
- Prepare reports – Many accountants spend an enormous amount of time putting together key reports for management analysis involving various data sources. Bots can collect the data and organize it for a report, letting your staff concentrate on the analysis.
- Checking data – Ticking and tying data from one report to another can be performed by a bot.

There are many misconceptions about RPA. Key points to keep in mind:

- You cannot automate everything with RPA; scenarios must be rules-based.
- Even when RPA could be used, you should consider other options such as packaged software where there is a complex complete solution, or a traditional interface when complete audit trail and controls are required.
- Not every person is going to create bots; while the technology is easier than coding, it still takes a strong technology-orientation and someone who is utilizing the software frequently to efficiently build bots. Some can be created outside the IT organization. You may hear this referred to as citizen-development. In many organizations, IT still does the development, with business-led strategy and analysis.
- They will not last forever; as business changes, so must your bots.

- Poor process and data using bots becomes faster processes but still producing poor quality results.
- Governance is critical; processes for security, controls, and change management are required.

Top vendors selling software to build RPA bots include UiPath, Blue Prism, Automation Anywhere.

3. Master Data Management (MDM)

While MDM is not new, the technology supporting it has significant potential for companies in two respects: 1) Since MDM tech has grown so significantly over the past few years, many companies have it implemented in partial or patchwork fashion, and 2) With the increase in speed of analytics and transaction processes due to new technologies, we will see more evidence of bad data.

Key capabilities of MDM technology include:

- Workflow
- Data governance support (data policies)
- Data quality and data modeling tools
- Data loading
- Integration capability with other systems
- System agnostic
- Advanced hierarchy management (including across systems)

Companies' needs for MDM vary greatly. These capabilities may or may not be important to your needs. Given the recent step changes in the technology of this market, some companies are spending more to build on their existing, outdated model that should be reconsidering available tools and current needs. As a caution, some MDM technology can cost more than their value to a company and calculating ROI is difficult when data permeates through so many processes. Consider measuring the time spent on data creation, manipulation, and correction. It is important to remember that the most important part of MDM is having well-defined processes, not the software.

Top vendors in MDM include Informatica, TIBCO Software, SAP, Oracle, IBM.

Summary

An ERP system is the backbone of a large company's finance and accounting. Most of these other technologies complement and utilize the data from an ERP system. Companies that cannot justify investment in ERP, likely are too small to efficiently utilize these new technologies.

Analytics technology is a key player in making Finance more responsive to the business and producing more timely information.

RPA will be commonplace in a few years. Some companies may create many of their own bots using standalone RPA products. Others will utilize more off-the-shelf systems that incorporate bots. A company should consider its investment based on its needs and determine its own strategy.

Master data management deserves another look. Examine whether your current processes and solutions are efficiently meeting your needs.

As a closing thought - Technology is not the silver bullet. RPA and analytics can speed up a process, but if the process is not effective, you are only getting to the wrong place faster.

Finance Technology for 2021

Join Denise Sanders, CPA, on **Tuesday, December 15 at noon** for a complimentary virtual webinar, Finance Technology for 2021. She will discuss technology trends that will reshape finance and accounting over the next ten years. Topics include Big data, RPA (Robotics Process Automation), AI (artificial intelligence), blockchain, and IoT (internet of things). Learn how Data Analytics, RPA, Master Data Management, and the recent developments in these fields are important to finance and accounting.

Register at [here](#).



Denise Sanders is a finance and technology executive. She advises companies on finance transformation, system implementation, mergers and acquisition integration, and project management. Denise is a CPA, CISA, and PMP. Follow Denise at www.linkedin.com/in/denisesanders.



Left: Ed Roth, CFA, CPA, CFP®, CEBS • Charlotte M. Jungen, CPA, CFP® • Wade D. Egmon, CPA, CFP® • Steven R. Goodman, CPA, CFP® • Chris A. Matlock, CPA, CFA

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Ready to Be a Healthier Human in 2021 - It All Starts With You.

By Brian Kush, PCC, CPA

The holidays usually provide an opportunity to take time off, refresh ourselves, and look forward to the new year. As we move from one year to the next, many of us feel a lot of positive energy around reflecting on what we most want to change and achieve in the new year.

This year, we say goodbye to a very tumultuous year – a historic year, an unprecedented year, and one of the most challenging years of our lifetime. 2020 challenged not only our leadership but the way we do *everything*, including our habits and our health (in all senses of the word).

As you look ahead to 2021, you may feel a desire to better yourself for the people around you. You may want to be a better leader because you know we need strong leadership now, more than ever.

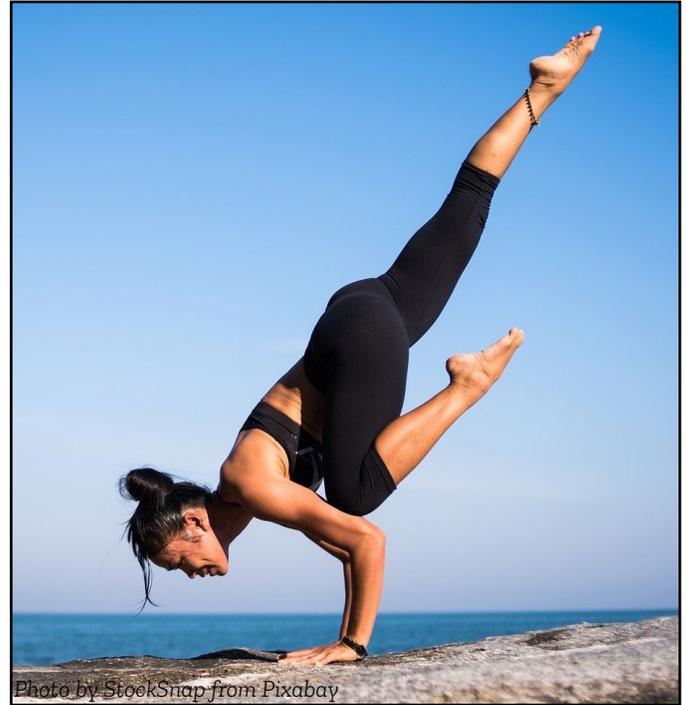
Before you set your new year's resolutions, ask yourself, "How can I be a strong leader and contributor, if I'm not a healthy human being?"

I'm going to share a composite sketch of many of the accountants we coach at Intend2Lead – a fictitious person named John Smith. As I describe him, I invite you to reflect on how much of yourself you see in John.

John is a very conscientious accountant. He is generally well-liked, reliable, respected, and has an incredible work ethic.

John also...

- Works an average of 10-11 hours per day.
- Rarely takes breaks during the workday, rushing from one Zoom meeting to the next (sometimes without even so much as a bathroom break!).
- Does not sleep well.
- Is too busy to exercise.
- Rarely eats healthy meals.
- Finds it difficult to be fully present with and engage with his family when he's not working.



- Usually takes a few vacations per year (though none in 2020, thanks to Covid-19). When he does take time off, he has a hard time unwinding. He struggles to "turn it off" enough to fully enjoy the vacation.
- Feels guilty when he is not working. The voice in his head is on repeat, telling him, "You're not getting enough done!"
- Constantly uses the word "overwhelmed" when describing his days.
- Spends a lot of time lamenting how hard everything is... how hard his life is.

John's automatic response to rising demands is to work more hours. He is accustomed to de-prioritizing himself and his well-being in the little time he has left outside of work.

John is not living a sustainable life. He's sacrificing his future health (in all senses of the word) because he believes it's the only way to succeed. John puts work ahead of his family, and he puts others ahead of himself. Taking care of himself is not even on his radar most of the time.

What are the costs of living life like this? I've seen up-close the devastating costs of deprioritizing self-care over long periods: burnout, health problems (physical, mental, and emotional), broken relationships, missed opportunities, hopelessness, and despair.

Even in the short term, John short-changes his impact. Since he's running on fumes most of the time, his team and organization receive a lesser version of him. He rarely engages fully, which limits the potential of his leadership and his team.

Now, let's get back to you. Do you see any of yourself in John? Are you limiting your potential and positive impact on others because you deprioritize yourself?

Before you create your 2021 resolutions, reflect on these three questions:

1. What does you, being a healthier human, look like in 2021?

Allow yourself to imagine what being a healthy human truly looks like for you. When have you been at your best in the past? What allowed that to happen? What might be possible for you, your team, and your organization when you take better care of yourself consistently?

2. Do you believe that you deserve to care for yourself before you take care of others?

This is a big one. It seems logical enough to say you'll prioritize your self-care. You probably know it's important. So, *why haven't you done it? What's stopped you in the past?*

It may come down to your beliefs. Many people find it hard to prioritize themselves. They think it's "selfish." They don't give themselves permission to do it.

Flight attendants tell us to put our oxygen masks on first before we help others with theirs. This seems obvious – if you run out of oxygen, you're no good to anyone. It's no different when it comes to your self-care. If you neglect yourself, you're not able to effectively help any of the people you care about.

To follow through on your self-care, you must believe you are important enough and worth enough to receive it. You must recognize that this helps not only you but everyone else in your life.

3. How will you prioritize yourself in 2021, so you can unleash your leadership potential?

What will provide you with the oxygen you need? What self-care practices will support you in showing up more fully for others?

Perhaps it's an exercise program, more consistent sleep, drinking more water, taking more breaks, or daily meditation. The options are limitless. What's one new practice or routine that will move the needle most for you right now? What feels like the most important first step in reclaiming your self-care?

Get specific. Visualize it happening. Think about what might get in the way, and plan for it. Set your boundaries, and honor them. If you don't honor your boundaries, no one else will.

Once you work through these questions and discern how you'll take care of yourself first in 2021, you'll have a lot more energy and space to tackle any other new year's resolutions.

When you're a healthy human first, you automatically become a stronger leader for others.

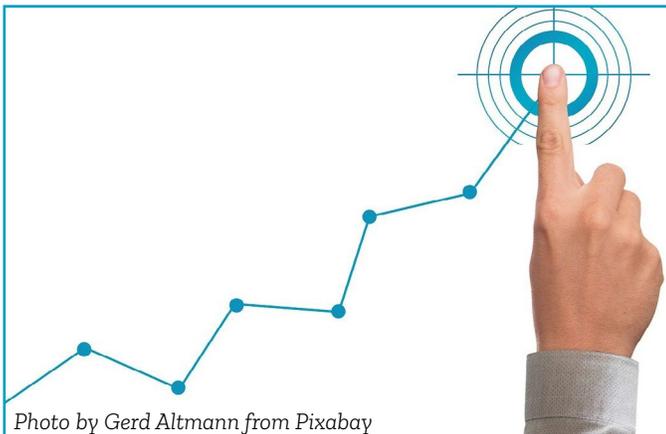
Find your oxygen, and breathe it in deeply. You deserve it.

Brian Kush, PCC, CPA – Brian is the co-founder and principal of Intend2Lead LLC, a leadership development company that coaches accountants to access the #DimensionofPossible through leadership coaching, consulting and group learning.

If you need support in being a healthier human being in 2021, [click here](#) to learn more. This 20-day power program will help you overcome burnout and overwhelm, expand your positive energy and sharpen your focus.

One Strategy for a More Productive You in 2021

By Mark Struczewski



As a productivity expert/trainer, I'm often asked what my number one productivity tip is. Without any hesitation, I always answer: plan.

But before I tell you the **how**, I need to talk about the myth about the first day of the year.

January 1st is just another date on the calendar. It contains the same 24 hours as every other day.

Which begs the question: why do people look at January 1st as **THE** date for a fresh start?

This has always puzzled me.

During Hurricane Harvey, August 25-28, 2017, I read an article on Runners World about what the author learned after running one mile a day every day for 250 days. I was intrigued. I started my running streak on August 29, 2017. Not January 1, 2018.

Want another example? On November 24, 2019, I decided to go vegetarian on January 1st. When did I actually go vegetarian? November 25th. The next day!

I want 2021 to be your best year ever.

But even more than that, I want **today** to be your best day ever.

Please don't wait until January 1st. It's just a date on the calendar.

Decide and then execute...**TODAY!**

"Tell your time where to go instead of wondering where it went."

Please re-read that last sentence several times. In fact, read it out loud. It contains the key to what you're going to learn in this article.

Do you know who says that statement **ALL THE TIME?** Me! Mister Productivity.

As a proud productivity nerd, I love keeping track of things and events. So, I can tell you that I really started to take planning seriously on January 4, 2019. That's the day I began using the planner I am currently using and haven't missed a single day since.

Did you miss that?

I intentionally plan my days...seven days a week.

Weekends, holidays, vacations.

Every day means every day. No exceptions.

Let me break this down for you.

Key point: it doesn't matter what planner you use or whether it's print or electronic. It's the actual doing!

Here are my four keys to productive planning.

Number One: Make it a Habit

How serious are you when it comes to planning?

Do you literally tell your time where to go, or do you just plan the "important" things like client calls, training, trips, doctor appointments, and the like?

The reason I take the time to plan every single day is to form the habit.

Number Two: Know Your Why

Many people (not you after you read this article) have no idea why they do what they do every day. They're on autopilot.

When's the last time you stopped and thought about your why?

If it's been a while, gift yourself the time to stop and think about this.

How?

Grab a notebook, something to write with, go someplace quiet, and just brainstorm. Write down everything you love to do.

Why is this so important?

Because your WHY will drive...

Number Three: Your Goals

To be clear, I am not referring to New Year's resolutions here. I don't want you to have resolutions, I want you to have goals.

You've probably heard that goals should be specific, measurable, achievable, realistic, and time-bound.

While I agree that goals should be specific, measurable, and time-bound, I think you need to have goals that are not achievable and realistic... at least for now. Jim Collins, bestselling author of *Built to Last*, *Good to Great*, and others, call these crazy goals BHAGs (big, hairy, and audacious).

If you don't have goals or if your goals are not stretching you, create new ones. Then get doing. But don't start on January 1st. **Start today!**

And finally...

Number Four: Planning

Most people either don't plan or they keep their plan in their head. I don't recommend either.

I recommend that you create your plan on paper either in a planner or in a notebook and then transfer it to your phone. That's what I do. I don't carry my planner around but my iPhone goes everywhere with me.

How I plan

First, I determine how many hours I am going to work on the day I am planning for.

Chances are good that there are already several items on it.

I subtract the number of hours already allocated from the number of hours I've decided to work and fill in the gaps.

For example: say I'm going to work four hours tomorrow and I have four hours already on my calendar. $8 - 4 = 4$. Which means I have to fill in four hours to complete my plan.

But what goes on your plan for these four hours?

You pick things from your list.

"Excuse me, but what list?"

I want you to create a list of things you need to do. This could be electronic or print, it doesn't matter... though I highly encourage you to consider the fact that in order for this to work, you need to carry it with you wherever you go (I use an app on my iPhone).

Whenever something pops into your mind (a client you need to call, a report you need to draft, an email you need to send, etc.), capture it on your list.

Now, when you have to fill in the gap, you have a list to draw from.

Here are some things you need to put on your plan (that most people forget):

- Buffer time (that call will run over, the client will arrive late, technology will fail you, etc.)
- Travel time (unless you can beam yourself from place to place)
- Time for quiet/meditation
- Breaks (full and micro-breaks)
- Personal development
- Exercising
- Planning (yes, plan time to plan!)

If you truly want to be the most productive version of yourself, planning needs to become a priority. Always, tell your time where to go instead of wondering where it went.

Let me know how it goes!

Find out how Mark Struczewski can coach you to be more productive for less than \$1 a day, get his top 5 productivity tips, register for his next live training, and more at MisterProductivity.com.



2021 TAX EXPO

January 11 - 12, 2021 | Virtual Webcast

Prepare for tax season at the TXCPA Houston Tax Expo on Monday and Tuesday, January 11-12, 2021! This two-day virtual conference provides practitioners with the updates and resources needed to prepare for tax season. Steven J. Tillinger, CPA, will launch this event by providing you with all the information you'll need to serve clients with confidence and clarity in his immersive Tax Update session.

Dates:

Monday, January 11, 2021 · 8:00 a.m. - 5:20 p.m.
 Tuesday, January 12, 2021 · 8:00 a.m. - 5:20 p.m.

Location:

Virtual Webcast

CPE Hours:

Up to 18 hours

Prerequisite:

None

Level of Instruction:

Update/Overview

Course Objective:

Provide updates on timely topics to prepare for the upcoming Tax Filing Season.

2021 Tax Session Topics



- Year End Tax Update featuring Steven J. Tillinger, CPA
- CARES Act
- Financial Markets Update
- Election Cycle and Estate Planning
- Navigating the IRS
- The Coronavirus Pandemic and Property Taxes

Registration Options and Fees:

Both Days - January 11 - 12
 Monday, January 11 Only
 Tuesday, January 12 Only

	Member/Non-CPA	Non-member
Both Days - January 11 - 12	\$300	\$400
Monday, January 11 Only	\$200	\$300
Tuesday, January 12 Only	\$200	\$300

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2020 - 2021 Recognition Awards

By Carol Spencer



CPAs are laughingly referred to as “bean counters” and everyone has a mental picture of how a CPA, or any accountant, should appear. As our human culture is diverse in so many facets, the same is true of the profession.

How do you describe a CPA?

A CPA is buried in tax return filings for weeks and months on end. A CPA spends hours reviewing financial data for an audit. A CPA connects with clients and potential employees, as well as with the golf ball on the green. A CPA is an educator. A CPA is a friend. A CPA is trusted. A CPA is someone you want on your side in a battle. A CPA is Confidential, Professional, and Astute.

How you define a CPA is different, based on your own Comprehension, Perception, and Attitude.

Members are the lifeblood of any organization. When called upon, TXCPA Houston members rise to the challenge. Whether it is helping neighbors and community after a natural disaster, offering aid to those in need, providing volunteer or financial support during a crisis, or mentoring a fellow member on their climb up their corporate ladder, you and your fellow members are there for others.

As we arrive at the new year, we reflect on this year of new challenges and successes. It is important that we pause to recognize our members who have given their time and articulated their visions to TXCPA Houston in 2020 - 2021.

You are encouraged to submit nominations for those members, including yourself, who you believe have excelled this year. There are many categories but not enough for all 7,000 members!

Categories include:

- Significant Contribution by a Member in Public Practice
- Significant Contribution by a Member in Industry
- Significant Contribution by a member in Education
- Significant Contribution by a Student Member
- Significant Support of the Society by a Firm/ Company
- Award that Fits No Other Category
- Distinguished Service to the Profession
- Distinguished Public Service
- Outstanding Committee Chair
- Outstanding Committee Member
- Outstanding Young CPA of the Year
- Outstanding CPA of the Year
- Outstanding CPE Event
- Outstanding CPE Award
- John B. Harrison Award for Community Service
- Stan and Margaret Voelkel Contribution to Education
- Rookie of the Year
- Special Recognition

[CLICK HERE FOR THE NOMINATION FORM](#)

Please thoughtfully consider and complete your nominations no later than Friday, February 5.

Chapter leaders will review the activities and accomplishments cited in the nominations, then select those who they believe are most deserving of recognition. Award recipients will be acknowledged in May, perhaps at the customary annual awards dinner. Caution remains and while hopeful and all-too-ready for a fun in-person event, proper care will be taken to ensure the utmost safety and health of the members.

If you have any questions concerning the recognition awards or general membership, please contact Membership Manager Carol Spencer at cspencer@houstoncpa.org or 832-831-9232.

In 2020, Support Education in Your Community and Chosen Profession

By Carol Spencer



How CPAs Help Schools

Books for classrooms, libraries and home; science lab equipment; math games and puzzles; graphing calculators; educational materials for physical education activities; anti-bullying programs; peer-to-peer reading and math tutoring; STEM for classrooms and after-school programs; musical instruments; and more. These are programs that CPAs Helping Schools (CHS) has helped to fund in recent years through grants.

While a campus is eligible for up to \$5,000 per school year in funding, the need far outweighs the available funds. In November 2019, eleven programs requested a total of \$26,533. Following review of these requests, CHS members provided partial or complete funding for nine programs at an average of \$1,787 per school.

2018-2019 grant funding provided for 14,182 total students at an average cost of \$2.36. The committee thoughtfully considers the reuse of purchased materials, providing for 65% reuse.

Requests	Amount Total	Funded	Amount	Average Per Program	Students Involved	\$ Per Student	Reuse of Materials
11	\$26,533	9	\$16,080	\$1,787	3,970	\$4.05	100%
36	\$89,483	24	\$33,532	\$1,397	14,182	\$2.36	65%



Since 2002, CHS has reviewed over 600 grant applications, awarding funding in excess of \$550,000 to over 200 schools in 35 local districts, private, parochial schools, and nonprofit educational organizations.

To fund grants, CHS receives net proceeds of the Scholarship Extravaganza Silent Auction and the Fall Fundraiser. The 2020 Fall Fundraiser at Top Golf was canceled due to COVID-19 challenges during the year, but the event will return in November 2021. Members and colleagues may [click here](#) to donate and 100% of your contribution will be provided to local PreK-12 schools to aid in the educational process for students.

CHS is grateful to local foundations including the C.T. Bauer Foundation, the Lowenstein Foundation, the Herzstein Foundation, and others for their charitable support of our PreK-12 education programs.

Many opportunities exist for you and your colleagues to HELP Schools and CHS:

- Underwrite CPAs Helping Schools programs through your financial support of the annual Fall Fundraiser
- Donate funds to CPAs Helping Schools through www.houstoncpa.org/contribute or by mail (TXCPA Houston Foundation | 777 Post Oak Blvd Suite 500 | Houston, TX 77056)
- Advise CPAs Helping Schools if your employer offers a matching funds program or community grant opportunities
- Provide donations for Silent Auction: restaurant gift certificates; tickets to local performing arts; tickets to local sporting

events; wine for special baskets; travel; anything you would like to bid on and win

- Become more environmentally conscious, offering used equipment and overage of supplies at your company to schools in need (we can help you locate a need)
- Be a school district liaison: maintain a line of communication between Society opportunities and school needs
- KEEP US INFORMED of your volunteer support and any needs your school may have

CHS is recognized by members of 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; promotes academic excellence by meeting schools' needs through a variety of creative ways; devotes most of our efforts to schools in need.

CPAs Helping Schools appreciates your continued support of our programs through your monetary donations, auction donations, direct donations, and volunteer assistance to local schools, and anything else you do to Help a School. If you want to be involved in a school, on the committee, or have any questions relating to CHS, please contact TXCPA Houston staff liaison Carol Spencer (832.831.9232, cspencer@houstoncpa.org).

To compensate for the cancellation of the November fundraiser, and for reduced proceeds from the 2020 extravaganza, **CPAs Helping Schools needs to raise \$25,000** to maintain their current support levels to local schools in 2021.

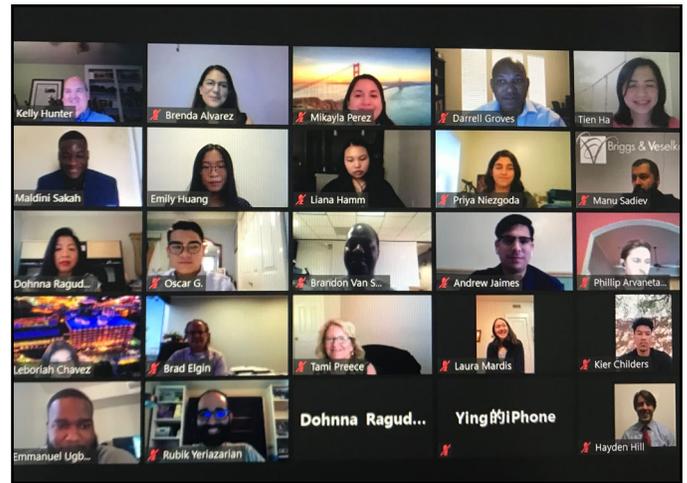
Secure the Professional Pipeline

The Accounting Scholarship Committee anticipates a shortfall of \$62,000 to fulfill their Board-recommended goal of 30 scholarships in 2021.

Scholarships are awarded to fifth-year accounting majors to help them complete their education and earn the 150 hours required by the Texas State Board of Public Accountancy to be CPA-eligible. Due to the tremendous need of local students, college seniors are also eligible for funding consideration. **Since 2005, over 400 local university students** have received financial assistance through the Accounting Scholarship program. This amounts to over \$1.3 million dollars in educational funding for future CPAs!

Previous scholarship recipients:

- Serve on your TXCPA or TXCPA Houston Board of Directors
- Work for Big 4, Middle Market Firms, and local public practice
- Work in industry
- Are independent business owners
- Speak to students about the benefits of an accounting career
- Provide financial support to TXCPA Houston Foundation
- Provide financial and volunteer support to local charities



2020 Scholarship Virtual Reception

Before January 1, log-in [here](#) and donate to provide that extra spark of hope that a first-generation college student needs to continue their university career, earn their 150 hours of study, and be ready to sit for the CPA Exam... help a student fulfill their dream of becoming a Texas Certified Public Accountant to help others!

YOU can make a difference in the lives of many!

[Donate Now](#)

If you would like to join either of these planning committees, or you have any questions, contact Membership Manager Carol Spencer at cspencer@houstoncpa.org.

Built on strength, stability and a well-established track record.

Let's Start a Conversation

Need to discuss financial planning, investment management or estate and trust questions? We can help you navigate financial complexity. Contact us to meet with a private wealth advisor.

713.683.7070

10000 Memorial Drive,
Suite 650, Houston, TX 77024



Chapter News - Member Highlights

Danielle Supkis Cheek, CPA, CFE, CVA, Appointed to a Committee of International Federation of Accountants



TXCPA Houston member, Danielle Supkis Cheek, CPA, CFE, CVA, has been appointed to serve as the U.S. Representative to the International Federation of Accountants (IFAC) Small and Medium Practices (SMP) Committee. Her term will last from January 1, 2021 – December 31, 2023.

Danielle's contributions on this important committee will impact the industry and Pannell Kerr Forster of Texas, P.C. for years to come," said Byron Hebert, CPA, CTP, PKF Texas Chief Growth Officer.

The IFAC SMP Committee is an advisory body providing strategic input on IFAC's activities in three areas:

- Providing regular and timely input to the international standard-setting process
- Developing and sharing practical guidance, tools and resources
- Promoting the visibility and recognition of SMPs

"With the coming adoption of new coming international quality control standards, this is an important time for firms," said Supkis Cheek. "The industry continues to evolve rapidly, so the opportunity to be part of a committee providing what firms need is rewarding."

Please help us congratulate Danielle on her exciting role!

Desroches Partners Appoints Harvin Lawhon, CPA, CICA as Managing Partner



Desroches Partners appointed Harvin Lawhon, CPA, CICA, to the role of Managing Partner. Lawhon will lead the firm in developing and realizing its strategic vision, and in bolstering the firm's future-readiness. Lawhon was selected to replace Jon Czerwinski, who has left the firm to pursue a new career opportunity.

Harvin currently serves as an officer on the board of directors for Bo's Place and TXCPA. He will be joining TXCPA Houston's board of directors in 2021.

Please help us congratulate Harvin on his new role!

If you would like to highlight a TXCPA Houston member for outstanding achievement, please email members@houstoncpa.org.

Chapter News

TXCPA Houston Solicits Audit Proposals

TXCPA Houston and TXCPA Foundation are audited annually by a firm associated with a Society member. The Audit Committee is soliciting proposals to conduct the audit for the current fiscal year ending May 31, 2021, and perhaps future years, as well as prepare and file the organizations' 990 and 990-T tax returns. Most of the audit work will be done during the months of July and August, while the tax returns will be prepared and filed in accordance with tax return deadlines.

Any firm interested should submit a letter of interest to David Dyer, CPA, Audit Committee Chair, at david.dyer4@gmail.com by February 1, 2021.

Anyone desiring additional information regarding the audit/tax return preparation may call David (832.816.3137) or TXCPA Houston Chief Financial Officer/Chief Operating Officer Kristie Ondracek (832.831.9229)

Firms with members currently serving on the TXCPA Houston Board of Directors, and firms with members who will serve on the 2021 - 2022 TXCPA Houston Full Board will not be considered "independent" and therefore, will be ineligible for consideration.

Update Your Profile

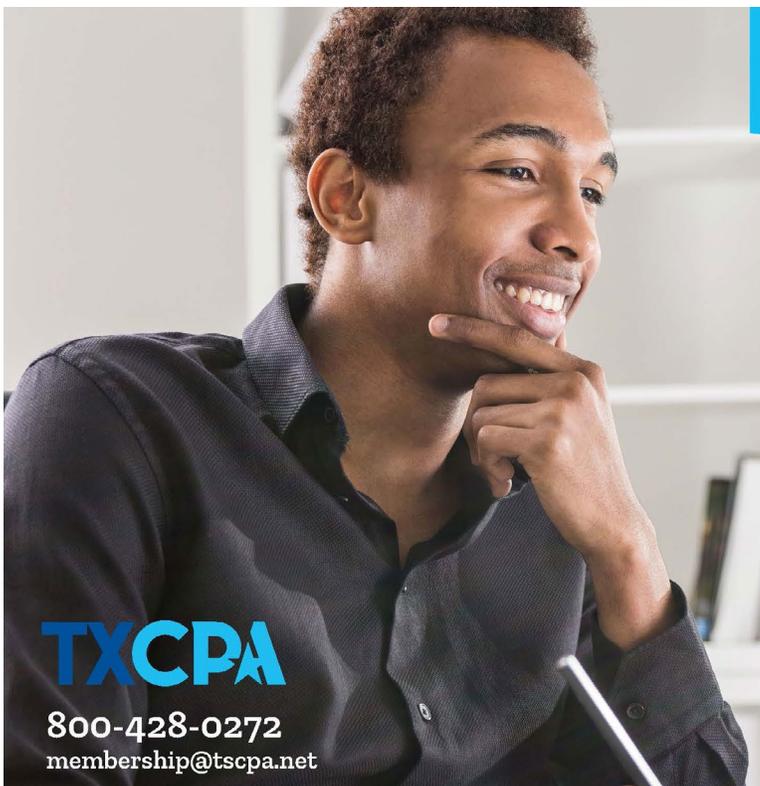
Recently changed jobs, moved or retired?

Then it's time to update your TXCPA member profile. Log in at www.tscpa.org and Member Profile should come up; if not, go to the bottom of the web page and click on Member Profile.

From here, you can update Contact Info, interest areas, and see transcript including invoices (paid and outstanding).

Under Interest Areas, there is a menu for Areas of Interest to help give TXCPA and TXCPA Houston what your focus areas are for newsletters and upcoming conferences.

Contact members@houstoncpa.org if you need assistance.



TXCPA

800-428-0272
membership@tscpa.net

JOIN TODAY FOR FREE AT
www.tscpa.org

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

2021-2022 TXCPA Houston Nominating Slate

Members nominated below will be presented at the upcoming virtual Annual Business Meeting on January 20, 5:30-7:00 p.m. [Click here to register](#).

TXCPA HOUSTON (CHAPTER)

Candidates for TXCPA Houston Officers

President:

Kelly Hunter

President-elect:

Charlotte Jungen

Vice President:

Adam Dimmick

Secretary:

Brad Elgin

Treasurer:

Tim Adler

Treasurer-elect:

Katherine R. Rodriguez

Immediate Past President:

Darrell Groves

Candidates for the TXCPA Houston Board Directors (terms expire on May 31, 2023)

Brian Alberts

Danielle Supkis Cheek

David Dyer

Wade Egmon

Harvin Lawhon*

Geri Pacheco

Tami Preece

Sable Waters

Rubik Yeriazarian

* Non-incumbant; all others are continuing terms as Directors.

Continuing TXCPA Houston Board of Directors (terms expire on May 31, 2022)

Mohammad Al-Kawafha

Ryan Firth

Rolando Garcia

Stephen King

Laura Mardin

Michelle Mullen

Kenneth Omuruyi

Susan Sample

Filling a Term Left Vacant

(term expires on May 31, 2021)

Kelly Higginbotham (left vacant by Charlotte Jungen who advances to President-elect)

Appointees for TXCPA Houston Nominating Committee

Darrell Groves (Immediate Past President)

Charlotte Jungen (President-elect)

Candidates for the TXCPA Houston Nominating Committee

Brian Alberts

Sheila Enriquez

Mohan Kuruvilla

Kathy Ploch

Mike Spartalis

TXCPA BOARD OF DIRECTORS (STATE)— HOUSTON SEATS

(The Houston Chapter is eligible for 34 seats)

Candidates for the TXCPA Board of Directors (terms expire on May 31, 2024)

Tim Adler

Billy Atkinson*

Austin Carlson

Brad Elgin

Harvin Lawhon

Michelle Mullen*

Lisa Pitts

Katherine R. Rodriguez

Tonja Rodriguez

Casey Stewart

Carol Warley

Barry Wilken

Rubik Yeriazarian

* Non-incumbant; all others are continuing terms as Directors.

Continuing TXCPA Board Members

Kelly Hunter (automatically appointed as TXCPA Houston's President)

Brian Alberts

Mohammad Al-Kawafha

Robert Allen

Brian Baumler*

Chris Breaux

Danielle Supkis Cheek

Adam Dimmick*

Patrick Durio*

Wade Egmon

Bill Frazer*

Thania Gonzalez*

Sheryl Jimerson

Brian C. Jones*

Charlotte Jungen*

Laura Mardis

Kenneth Omuruyi

Kathy Ploch

Susan Sample*

Mike Spartalis*

Robert Sweeney*

Ramsey Womack*

* Asterisks indicate terms expire on May 31, 2022; all others expire on May 31, 2023.

Chapter News

SAVE THE DATE: TXCPA HOUSTON 2021 CONFERENCES

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 with accuracy and confidence.

Spring Accounting Expo

May 17-21, 2021
Virtual Webcast

Join accountants and financial decision-makers for a two-day event focused on the future of accounting. Learn up-to-date information on technical topics, technology, economy updates, and management skills.

CPE by the Sea

June 2021 (Date to be announced)
Galveston Convention Center*

Network with top CPAs, gain valuable information covering all professional areas of interest, and enjoy the Galveston attractions at this three-day conference that mixes business with pleasure.

Energy Conference

August 26, 2021
Omni West Houston*

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

CFO/Controllers Conference

September 22, 2021
Houston Marriott Sugar Land*

This one-day conference provides financial leaders of small to mid-size companies with updates and information to keep them on top of accounting changes and trends.

Medicare Workshop and Personal Financial Planning Conference

October 25-26, 2021
TXCPA Houston Training Facility*

This two-day event provides participants with valuable knowledge for better financial decisions in every financial stage of life.

** Classes will remain virtual until January 31, 2021. In-person classes may change depending on COVID-19 guidelines. Email cpe@houstoncpa.org to learn more.*

SPONSORSHIP OPPORTUNITIES

CPAs play an integral role in their companies' important decision-making processes. 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 TXCPA Houston at cpe@houstoncpa.org.

Thank you to corporate sponsors for making 2020 possible!

TXCPA HOUSTON **TXCPA HOUSTON FOUNDATION**

THANK YOU TO OUR CORPORATE PARTNERS

Accounting Practice Sales
THE GLOBAL LEADER IN PRACTICE SALES

Briggs & Veselka Co.
CPAs and Business Advisors
A Legacy of Loyalty

Goodman Financial
SERVING CLIENTS FOR OVER 90 YEARS

APP COMPUTING

KERR CONSULTING

Chapter News - Upcoming Seminars

Federal Income Tax Update

Dates:

Dec. 14, 2020 - Virtual Webcast
Jan. 27, 2021 - Virtual Webcast
Feb. 17, 2021 - TXCPA Houston Training Facility*

CPE Credits: 8

Instructor: Steven J. Tillinger, CPA

Whether you are a generalist or a tax specialist, you will take away valuable information and insights from this eight-hour program. The course will bring you up-to-date on current issues in federal income taxation affecting individuals and small business owners with an emphasis on coverage and analysis of 2020 tax legislation, with special emphasis on coronavirus legislation, both final and proposed; updates and new developments of 2019 and earlier tax law, with emphasis on continuing developments with the Tax Cuts and Jobs Act; important court cases; Treasury income tax regulations; IRS revenue rulings and procedures; and more!

Member - \$250/ Non-member - \$350

Individual Income Tax Update

Dates:

Dec. 17, 2020 - Virtual Webcast
Jan. 21, 2021 - Virtual Webcast
Feb. 4, 2021 - TXCPA Houston Training Facility*
Feb. 9, 2021 - TXCPA Houston Training Facility*

CPE Credits: 8

Instructor: Blaise C. Bender, CPA, JD

This session will cover Legislative, Judicial, and IRS Guidance of the past year as it affects individual taxpayers. The session will include new tax legislation pertaining to individuals under the CARES Act and SECURE Act. It shall include recently issued regulations under the Tax Cuts and Jobs Act. The session is also designed to assist CPAs in individual tax planning for their clients. The session will provide coverage of the latest IRS rulings, regulations and procedures impacting individuals as well as an up-to-date assessment of important tax court decisions.

Member - \$250/ Non-member - \$350

Accounting & Auditing Seminar: Hidden Beast in GAAP Due to COVID Surprises

Date: Dec. 15, 2020

Time: 11:00 a.m. - 1 p.m. | Virtual Experience

CPE Credits: 2

Session 1: 11:00 a.m. – 12:00 p.m.

Topic: 2020 SEC Updates

Speaker: Brandan McGaughey, Partner,
Grant Thornton

Learn the changes to 2020 10-K Risk Factors, impacts to the MD&A, and financial statement disclosure considerations that will help keep unwanted surprises out of your and your clients' organizations.

Session 2: 12:00 p.m. – 1:00 p.m.

Topic: Reporting During a Pandemic

Speakers: Jamie Scheffe, Director, BKD
Zach Morrison, Senior Manager, BKD
Anna Stevens, Weaver

Participate in a panel discussion on the impact COVID may have on financial reporting for the year, what considerations to be thinking about, and potential issues to prepare for to keep you on top of your game.

Member - \$0/ Non-member - \$25

Business Income Tax Update

Dates:

Dec. 18, 2020 - Virtual Webcast
Jan. 22, 2021 - Virtual Webcast
Feb. 5, 2021 - TXCPA Houston Training Facility*
Feb. 10, 2021 - TXCPA Houston Training Facility*

CPE Credits: 8

Instructor: Blaise C. Bender, CPA, JD

This session will cover Legislative, Judicial and IRS guidance updates as they impact Sole Proprietorships, Corporations, S Corporations, Partnerships and LLCs. Topics include business tax provisions and legislation under the CARES Act for the upcoming tax season. It will include recently issued regulations under the Tax Cuts and Jobs Act pertaining to business matters. The session is designed to assist CPAs in business tax planning matters and will provide coverage of recent IRS rulings, regulations and procedures, and relevant tax court cases impacting various forms of businesses.

Member - \$250/ Non-member - \$350

** Classes will remain virtual until January 31, 2021. In-person classes may change depending on COVID-19 guidelines. Register at www.houstoncpa.org. Email cpe@houstoncpa.org to learn more.*

Chapter News - CPE Catalog

CPE CLASSES, SEMINARS & CONFERENCES

Register at www.houstoncpa.org

Date	Course	Hours
12/03/2020	Northwest Roundtable - HR and Payroll in Today's Climate	3 hours
12/14/2020	Federal Tax Update, Steven J. Tillinger	8 hours
12/15/2020	Accounting and Auditing Seminar	2 hours
12/15/2020	Ethics: It's a Matter of Choice, Deanna Sullivan	4 hours
12/17/2020	Individual Income Tax Update, Blaise Bender	8 hours
12/18/2020	Business Income Tax Update, Blaise Bender	8 hours
12/18/2020	Finance Technology for 2021, Denise Sanders	1 hour
01/11-12/2021	Tax Expo - Both Days	18 hours
01/11/2021	Tax Expo - Day 1 only	9 hours
01/12/2021	Tax Expo - Day 2 only	9 hours
01/21/2021	Northwest Roundtable - Tax Season Panel	3 hours
01/21/2021	Individual Income Tax Update, Blaise Bender	8 hours
01/22/2021	Business Income Tax Update, Blaise Bender	8 hours
01/27/2021	Federal Tax Update, Steven J. Tillinger	8 hours
01/29/2021	Ethics: It's a Matter of Choice, Deanna Sullivan	4 hours
02/04/2021	Individual Income Tax Update, Blaise Bender	8 hours
02/05/2021	Business Income Tax Update, Blaise Bender	8 hours
02/09/2021	Individual Income Tax Update, Blaise Bender	8 hours
02/10/2021	Business Income Tax Update, Blaise Bender	8 hours
02/17/2021	Federal Tax Update, Steven J. Tillinger	8 hours
02/26/2021	Ethics: It's a Matter of Choice, Deanna Sullivan	4 hours

NOTE: Classes will remain virtual until January 31, 2021. In-person classes may change depending on COVID-19 guidelines.

TXCPA News

TXCPA Month of Service

We invite you to participate in TXCPA Month of Service this December. With a statewide focus on financial literacy education and service, TXCPA members and chapters are extending resources to various organizations across the state to help Texans build a stronger financial foundation. Contact your chapter to learn about volunteer opportunities close to home. [Click here](#) to see a full list of opportunities for the Month of Service and throughout the year.

TXCPA Group Billing Program

The Texas Society of CPAs is committed to helping the organizations that employ our members leverage those membership investments to support organizational goals for success. We know each organization has unique needs. TXCPA's Group Billing Program is tailored to meet those needs.

If you would like to participate in the Group Billing Program or ask any questions, please contact Stephanie King, sking@tscpa.net.

PAC Fundraising Chapter Challenge

Have you given your \$10 to the CPA-PAC yet? Give now through December and help your chapter win the Chapter Challenge. Your contribution is more important than ever as we embark on the 2021 Texas legislative session. A PAC donation is the easiest, fastest way to protect the profession you worked so hard to join.

Contact Diane Joiner, Manager, TXCPA Governmental Affairs at djoiner@tscpa.net for more information.

Depression Knows No Season

"This is supposed to be a joyous time of year, yet I feel angry one minute and plunged into despair the next. What's wrong with me?"

You might be suffering from depression. ACAN, the TXCPA Accountants Confidential Assistance Network, offers confidential assistance. Call us at 866-766-ACAN. *All we want to do is help. All you need to do is call!*

Advocacy Day; Midyear Board and Member Meeting

All members are warmly welcome to participate in TXCPA's virtual Advocacy Day on January 26. An online meeting will be held that morning and there will be virtual legislative visits that afternoon.

The Midyear Board of Directors and Members Meeting will be online the morning of January 27. The agenda will include updates on the new Strategic Plan and presentation of the 2021-2022 leadership slate.

Watch your weekly TXCPA Viewpoint for additional details and registration information.

TXCPA Exchange

Have you visited TXCPA Exchange recently? Sign in with your TXCPA member login credentials, update your bio and add a profile photo. Then connect with colleagues through the member directory, join an interest-area community, ask a question on the main forum or provide feedback on a discussion thread. The ways to engage are endless and the more members who contribute, the more valuable the community becomes. [Click here](#) to log on.

BECOME A MEMBER TODAY

Visit www.tscpa.org/membership/become-a-member

JOIN TODAY

Classifieds

Let Accounting Practice Sales, the largest marketer of CPA practices in North America, assist you.

We understand your concerns and respect your confidentiality. Contact us for a FREE, no-obligation valuation of your firm. Buyers, for additional information on any of the listings below, contact us by email Holmes@APS.net, by phone (888) 847-1040 or visit our website www.APS.net.

Featured Practices for Sale (gross revenues shown):

- League City Area CPA \$1.8MM
- Greenway Area CPA \$1.7MM
- Gulf Coast Area Tax \$1.6MM
- West Houston CPA \$1.2MM
- West Houston CPA \$1.1MM
- Central Houston CPA \$1.1MM
- West Houston CPA \$725K
- NW Houston CPA \$408K
- SW Houston CPA \$406K
- West Houston CPA \$350K
- SE Texas CPA \$310K
- Houston CPA \$180K
- West Houston CPA \$133K
- West Houston Katy CPA \$130K

Galleria-Uptown Houston Sub-lease Available

Galleria-Uptown Houston area accounting firm with 1-5 offices available for sub-lease. Potential to customize space. Approximately 750 sq feet. Located in a Class A building on Augusta Dr. near Westheimer. Contact Kim Banker 713-298-7123 or kbanker@duffkitchel.com to inquire.

Share Office Suite - Upper Kirby

Share an office suite with other professional with an unfurnished private office. For more information: visit drpeterc.wixsite.com/website-1 or email drpeterc@gmail.com.

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!

[Click here to start 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. Please email this form to chapter@houstoncpa.org or complete the form online [here](#).

TXCPA HOUSTON

777 Post Oak Boulevard, Suite 500
Houston, TX 77056-3212
Phone: 713-622-7733