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FORUM

Accounting

in the

Age of Agility

Protecting Yourself and
Loved Ones from Scammers

How Interim Executives Can Be a
Surprising Benefit to Your Company

Responsibilities to Clients When a
CPA Firm Is Merging or Acquired

Message

from the desk of _____



Charlotte Jungen, CPA, CFP®
President

Wow....can you believe it's already September? Do I dare say I feel a slight dip in temperatures? As we head into a new season and watch kids return to school, I am reminded of how fast time flies. I am blessed to have 19 nieces and nephews, with the 20th on the way. As I watch the oldest ones navigate accounting college courses and the career choices facing them, I can still clearly picture them as young as the littlest ones are today. Life flies by. Everything passes by so quickly these days. So much change. So much information. So much to take in. So much to adapt to.

Our profession is no different. As our world keeps changing, our work has to adapt to account for an ever-evolving world. To succeed, we must be comfortable with Accounting in the Age of Agility. What does that mean? We have to be nimble. We have to be willing and able to adapt as things change. We have to be creative in finding solutions to new issues.

Fortunately, TXCPA Houston is here to help its members every step of the way. To keep you up-to-date on the latest issues affecting our profession, we have multiple CPE opportunities, including the [2022 CFO/Controllers Conference](#) on September 28 and the [Personal Financial Planning Conference](#) on October 20. [Click here](#) for a complete listing of all CPE events.

Being agile is a must-have trait for every leader these days, and it's never too early to start developing the skills we need in this Age of Agility. We have multiple opportunities to build your leadership skills throughout the year, including our Leadership Development program, [Accelerate](#). Registration just opened, so [click here](#) to see if it's right for you. As we see firms and companies continually challenged with staffing issues, this is a perfect opportunity for employers to demonstrate the value they see in their staff by investing in their professional development.

Lastly, don't miss out on our half-day workshop on October 24 covering [Unconscious Bias](#). Through technology, we are more connected with people today than we have ever been. By raising our awareness of the unconscious biases we all hold, we can better understand and learn how to support each other as we all navigate this Age of Agility together.

from the desk of _____



Mark Allen, CAE
Executive Director

I recently attended an association executives' conference, where I was consistently told that the best practices I've successfully used for years are now archaic. Don't get uptight if employees want to take naps in the middle of the workday, they said. Your Employee Policy Manual might as well be from the Stone Age if it doesn't include a pet bereavement policy, they insisted. You're doing something wrong if your staff members experience stress at work.

Wait, what?

While these may include the more amusing suggestions, the point is quite serious. Adapt to changing business, economic, and workforce shifts or give up any hope of attracting or retaining quality employees to your organization. That requires business agility. According to Wikipedia, the definition of business agility is "rapid, continuous, and systematic evolutionary adaptation and entrepreneurial innovation directed at gaining and maintaining competitive advantage." Wow. Not sure "systematic evolutionary adaption" will fit into an ordinary workday, but let's try it.

It's no surprise to anyone not living under a rock that the world continues to change at lightning speed. Thanks to the miracle of modern technology, consumers demand customization, nearly instant delivery, and bargain prices. I know that's true because I'm one of those consumers who's disappointed if I don't receive my \$10 Amazon order within hours, not days. How can we possibly stay agile enough to keep pace with the incredibly fast-paced changes in business? I'm not sure, but taking small steps is a good start. Attend TXCPA Houston [CPE events](#) to pick up recommendations from subject matter experts as well as your colleagues. Connect with peers at membership events so you'll have someone to compare notes with when someone points out that one of your tried-and-true best practices are outdated.

Several articles in this issue offer ideas for small steps. Facing a serious staff shortage? Explore interim executives (Lexi Spaulding's "[How Interim Executives Can Be a Surprising Benefit for Your Company](#)"). Struggling to adopt automated technology software? Learn the pros and cons of two popular programs (Alik Mock's "[Accounting Technology Comparison Guide: Karbon vs. Canopy](#)"). Reduce your risk of getting scammed by updating your knowledge (Diana Castro's "[Protecting Yourself and Loved Ones from Scams](#)").

After giving what I heard at the conference some thought, I'm seriously thinking about adding a policy for pet bereavement leave at TXCPA Houston. I'm even considering allowing staff to enjoy midday naps within specific parameters. How's that for agile?



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How Interim Executives Can Be a Surprising Benefit to Your Company

by Lexi Spaulding



Top talent is difficult to find, especially in this current hiring climate. Many hiring managers struggle to fill higher-level roles within their organizations. These roles tend to fall into the C-suite category: CFO, CIO, Chief HR Officer, CTO, and more. To expedite your search process, we urge you to consider interim support.

There are many myths regarding the hiring of interim professionals, we have debunked some of the most common myths below:

It Takes Too Long to Learn Your System

Most employers believe they will have to train interim support on the company's software systems and then retrain another employee when they hire for the same position permanently. However, when working with a CFS recruiter, we will match the skills you need with one of our many qualified candidates. Our candidates are well-seasoned, systems savvy, and have experience in a variety of industries.

Consultants Must Work On-site 100% of the Time

Before COVID-19, most employers believed that interim support had to work on-site, to complete the job/be a good fit. The COVID-19 pandemic has proven that this is not the case.

"In the past year alone, we have gone from having zero to twenty-five percent of our temporary workers work remotely. They are remote from day one" ([Carrie Jenkins, Senior Managing Division Director](#)). By opening your search to remote workers, you dramatically widen your pool of candidates. This allows our

recruiters to utilize our national database of candidates and to find someone whose talent fits the role more precisely than a local candidate.

C-Suite Vacancies Cannot Be Filled with an Interim Consultant

We hear time and time again that filling a C-Suite role temporarily is not possible, as it involves a timely interview process. CFS can bridge the gap between a tenured employee leaving your team and the onboarding of a new employee. Each of our interim professionals brings a toolbox of skills and technical capabilities to the role. Our consultants can not only maintain the processes and procedures that have already been established, but they can add value to your company by introducing an outside perspective.

Interim Help Is Not Going to Fit in with Your Company Culture

As a staffing firm, matching employer needs with candidate needs is a top priority for us. "In addition to the technical skills needed, our team asks questions about work pace, personality and culture to attract the best candidate for each project" (Jenkins). On a day-to-day basis, we interview new candidates and work diligently to make the best cultural fit for every position we work on. Only those who are qualified will get the chance to work with you.

Interim support can be a tremendous asset to your team. There is no need to be hesitant when you are faced with a setback in a management seat and need to find help quickly. Creative Financial Staffing (CFS), along with our Technology Division (CFS Technology), has staff immediately available to keep critical Accounting, Finance, and Technology functions running. Let our network work for you and contact us today for more information.



Lexi Spaulding is a Marketing Assistant at Creative Financial Staffing (CFS). CFS is a leading, employee-owned staffing firm founded by CPA firms. Visit www.cfstaffing.com to learn more.

Responsibilities to Clients When a CPA Firm Is Merging or Acquired

By Arthur J. (Kip) Dellinger, Jr., CPA

It is not news to CPAs and their firms that the profession began undergoing an enormous consolidation a few years ago, which is expected to accelerate over the next several years. This is a result of many factors — retirement planning, monetizing of client values, staggering advances in technology, market share and services expansion, among many other reasons.

The consolidation typically takes the form of mergers and acquisitions and sometimes a combination of both. And it involves not only very large firms merging — or bringing in firms of significant size in a local or regional market — but also includes local firms and even sole practitioners combining or acquiring practices of retiring practitioners.

When a proposed merger or acquisition transaction is undertaken, questions arise about the professional obligations and responsibilities of the **target firm**, including any required communication pertaining to its clients' confidential information and the transfer of client files to the successor entity.

Professional Standards — American Institute of Certified Public Accountants (AICPA)

Two provisions of the AICPA's Code of Professional Conduct address merger and acquisition issues.

The first and most significant provision is ET § 1.400.205 – Transfer of Files and Return of Client Records in Sale, Transfer, Discontinuance or Acquisition of a Practice¹ — and additionally interpreted in [Frequently Asked Questions: General Ethics](#) (updated March 18, 2022).

ET § 1.400.205 provides that when a CPA's practice is sold or transferred to another firm and the seller/transferor will no longer retain an ownership in the successor practice, each client must receive a written request for consent to transfer its files to the successor firm. The notification may state if a negative response is not provided within 90 days, permission will be



assumed by the successor to transfer the files. Moreover, the files should not be transferred until client permission is obtained or the 90 days period expires. Additionally, the acquiring firm is equally responsible for compliance with these requirements. However, there are conflicting requirements discussed below when tax information will be transferred in a sale of a practice.

Equity vs. Non-Equity Transfers

The Frequently Asked Questions addressing "Transfer of client files in a merger" clarify that if a target CPA firm's owner(s) become equity partners, the client notice requirements do not apply — regardless of the percentage of ownership.

Alternatively, if the target CPA firm's owner(s) are admitted as non-equity partner(s), the client written notice requirements discussed earlier will apply.

There may also be hybrid situations — for example, when the target CPA firm's partner, equity or non-equity, "own" clients. In that event, each client situation must be evaluated and treated in a manner consistent with these rules pertaining to equity and non-equity owners in successor entity.

Conflict of Interest Considerations (ET § 1.700.010)

In some circumstances, the parties must consider possible conflicts of interest. For example, when two CPA firms are combining

¹ET1.400.205

and each represent industry competitors, or when a practice being acquired includes a competitor of a client of the acquiring firm (where one or both clients would prefer not to share the same CPA firm) can create a conflict-of-interest issue. How such matters are handled should be specified in the agreement to the contemplated merger or acquisition.

Accountancy Laws

CPAs and CPA firms are regulated by Boards of Accountancy in the states and other geographical locations where they practice. When one or both firms are pursuing an acquisition or merger, the parties should ascertain which Boards have jurisdiction and determine the applicable jurisdictional rules that apply to the contemplated transaction. Fortunately, the overwhelming number of jurisdictions adopt (specifically or impliedly) the ethics rules of the AICPA (for example, Rule 58 of the California Board of Accountancy).

The California Board of Accountancy recently proposed a specific rule regarding CPA firms' duties when there was a sale or transfer of a licensee's practice (Proposed Rule Sec. 54.2) but withdrew the proposal in February 2022. This presumably means California continues to default to the AICPA provisions.

CPAs Must Comply with Onerous Treasury Regulation Requirements

Internal Revenue Code Section § 7216 ("the Code" or "7216") is a criminal statute regulating tax preparers with regards to their "uses" and "disclosure" of a taxpayer's return information. The Code is very general and provides that Treasury issue regulations governing the application of Code Section § 6713, which provides civil monetary penalties for similar violations. Its application is governed by 7216 regulations and the provision is more likely to be asserted by the Internal Revenue Service ("the IRS" or "Treasury") because proving a criminal violation has a much higher bar than meeting a civil violation.

Treasury has issued three regulations under Sec. § 7216 – Reg. Sec. 1.301.7216-1, 2 and 3. These regulations should be reviewed annually by firm leadership to ensure continued compliance with their requirements, [IRS Section 7216](#). Regulation

1.301.7216-1 addresses, definitions and the respective penalties associated with violations of the Code. The significant portion states that "taxpayer information" is any information pertaining to the taxpayer. For example, the use or disclosure of the taxpayer's name can result in a violation and the regulation is not limited to financial information or identification numbers.

The second regulation, 1.302.7216-2, is key to a firm's practice because it sets forth those "uses and disclosures" that a tax preparer may make or engage in **without prior written approval** of the taxpayer, whose information is to be used or disclosed. One of the uses may be to compile a list for solicitation of tax return preparation business (1.302.7216-2(n)). While the CPA firm, as a compiler of the list, is not generally permitted to transfer it, an exception is made when there is a transfer in combination with the sale or disposition of the firm. The typical due diligence conducted prior to the proposed sale of the CPA's tax preparation business will not represent a transfer of the list if: the CPA selling the firm has a written confidentiality agreement with the acquiring firm that expressly prohibits any use or disclosure of information permitted to be on the list for any purpose other than the purchase of the firm's business.

If the use or disclosure is not contained in the second regulation, then strict adherence must be made with the third regulation, which sets forth specific, detailed requirements for obtaining the taxpayer's prior written approval.

Regulation Section § 301.7216-2(d)(1) permits, without taxpayer approval, the use and disclosure of taxpayer information among preparers and processors of a firm regarding tax return preparation and related-tax advice. Therefore, when a merger takes place between two firms and there is continuity of personnel from the target firm in the successor firm, the IRS can be expected to apply the same principles as the AICPA to the transaction. When the target firm's owners do not retain an equity interest in the successor firm, an abundance of caution would be to comply with the stricter request for permission requirements set forth in Reg. Sec. 301.7216-3. Unfortunately, the request for consent does not specify the number of days within which the client must respond, which can be problematic for the successor firm, instead

requiring affirmative consent must be given by the taxpayer before a transfer takes place.

The regulations do not provide for an acquiror's quality review of tax returns in connection with a sale or merger of a CPA firm's practice. This is different than the AICPA rules and consequently, the CPA firm whose clients' returns will be the subject of a review, must obtain client permission for the use and disclosure of their return information when contemplating a sale or merger.

This may present challenges to the two firms, as the acquiror will be limited in identifying particular returns and therefore may request to review it (because they cannot have access to any return information in the selection process). Or, the target firm would have to seek permission from every tax return client to enable the

acquiring firm to make its selection. The parties must find a satisfactory solution to the quandary — perhaps a random selection from a list identified (only by numbers) that correspond to an alphabetized master retained by the target firm.

It is critically important to remember in merger and acquisition transactions that the requirements under tax laws must be complied with in addition to complying with the CPA profession's ethical standards.



Arthur J. (Kip) Dellinger, Jr., CPA, provides services as an expert in the areas of CPA tax practice regulatory discipline and malpractice matters.



2022 CFO/CONTROLLERS CONFERENCE

Join CFOs, controllers, and financial managers at TXCPA Houston's CFO/Controllers Conference at the Norris Conference Center - Houston CityCentre - Hybrid on Wednesday, September 28, 2022, to develop strategic leadership skills and gain valuable insights. It's your unique chance to learn the latest accounting news and trends, collaborate with peers, find business solutions, and earn 11 CPE hours – all-in-one spot.

What You Need to Know

Date: Wednesday, September 28, 2022

Time: 7:00 a.m. - 6:00 p.m. (Central Time)

Virtual option will be offered

Location: Norris Conference Center
Houston CityCentre
816 Town And Country Blvd # 210
Houston, TX 77024

CPE Hours: 11 hours

Prerequisite: None

Level of Instruction: Update/Overview

Course Objective: o provide financial leaders of small to mid-size companies with updates and information to keep them on top of accounting changes and trends.

REGISTER TODAY: www.txcpahouston.cpa or 713-622-7733



Accounting Technology Comparison Guide: Karbon vs. Canopy

By Alik Mock



Photo: Canva.com

Many accounting firms today are turning to automation to make accounting easier and more efficient. Accounting automation integration has become a popular option for small and medium-sized businesses that want to keep up with the changing times and streamline their accounting processes. Automation integration allows businesses to automate repetitive tasks or manual data entry that requires human intervention. The two software options this article focuses on, [Canopy](#) and [Karbon](#), are software programs that can be integrated directly into existing workflows to help businesses scale up quickly and efficiently.

Karbon and Canopy are both used by accountants for their day-to-day operations. Karbon offers features like time tracking, CRM integration, and document management, while Canopy offers features like email marketing, billing automation, and data analytics.

In this article, we will compare Karbon vs. Canopy so you can determine which one is better suited for your needs.

Karbon Overview - The Best Accounting Software For Integrating Systems & Connectivity Of Accounts

Karbon is simple accounting software for small and medium-sized businesses. It's designed to be an all-in-one solution for accountants and bookkeepers who need to manage multiple clients.

Karbon offers a practice management solution that connects differing and often siloed parts of a firm — including teams, clients, systems, and data — bringing them all together in one place, whether remote or in the office. Karbon enables seamless communication and workflows so teams know who's doing what, when, why, and how, significantly improving visibility, efficiency, and connectivity.

Karbon also offers connectivity of accounts. This means you can link it with other software such as QuickBooks Online, Xero, FreshBooks, or any other accounting software and easily import your data from these programs into Karbon with zero hassle.

Canopy Overview – The Best Accounting Software For Operating Systems & Data Entry Of Accounts

Canopy is an affordable yet powerful practice management software that has been designed for both Mac and Windows to keep teams organized.

Canopy helps improve how you manage your business by providing you with the tools to keep track of your finances, ensuring you have all the vital information for making decisions quickly and efficiently. Plus, the software interface is easy to understand and use, which eliminates the need for extensive training time.

Accounting software can be daunting to evaluate. But most software can integrate with other business apps and dedicated accounting programs like QuickBooks. Interfaces are usually designed to make the user experience simpler so users don't have to worry about training time. If you're looking for a solution to your headaches and you need it now, Canopy may be your best bet.

Comparing The Tools – Canopy Vs Karbon

Integrations

Both Canopy and Karbon have APIs that allow developers to connect directly with their systems. If you want to hire developers to build a robust, custom system, both software options can be molded to fit your needs.

Karbon - Broad native integrations to a suite of apps including Gmail, Microsoft Office 365, Microsoft Exchange, QuickBooks, and Zapier. These integrations allow you to connect your email and other ecosystem apps to streamline your data and automate common processes.

Canopy - Zapier integrations and templates for pre-configured workflows or DIY tools. Canopy can trigger real-time workflows to keep itself in constant contact with contacts, client data, and email communications.

Ease of Use

Karbon - Boasts a sleek interface, but there are some issues with

the calendar (we can expect an updated calendar this summer) and email integrations (although most users perform Karbon's email integrations to Canopy). Users have reported that the Karbon task list can be overwhelming, especially to new users.

Apple App Store Mobile App review: 4.6 stars with 11 ratings

Canopy - Boasts great migration tools, an extensive knowledge base, and tutorials for problems operating the system. Users have also submitted complaints about the task feature being clunky. This seems to be a trend with accounting practice management software. Email integration is not as robust as Karbon. Canopy receives high marks for continually improving its software and adding new integrations. However, users tend to express dissatisfaction with application customer support.

Apple App Store Mobile App review: 4.8 stars with 297 rating

Price

A key difference between Karbon and Canopy is that Karbon's pricing structure is simpler and can be paid monthly without locking users into an annual plan.

Karbon - Charges per user based on the team or business plan. Their Team Plan is \$59/user per month with an annual agreement. The Business Plan runs \$79/user per month with an annual agreement. There's also a custom cost Enterprise Plan for teams of 20 to 20,000.

Canopy - Offers modular-pricing plans, with pricing based on the modules that fit your firm. These modules are intended to work with a variety of accounting needs: Document Management (\$40/user/month), Workflow (\$30/user/month), Time & Billing (\$24/user/month), and Transcripts & Notices (\$33/user/month). Canopy also offers a Client Management module (\$2.50/client/year with a minimum of 200 clients).

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-  Regulations & Compliance
-  Transformation

Customer Service

Karbon - Extensive resources, a fast response time, and various contact methods, such as chat and email. However, Karbon does not offer phone support.

Canopy - Helpful resources including video tutorials, webinars, and a deep knowledge base. Their response time is quick via chat, phone, and email.

Conclusion

Canopy and Karbon are very similar. While Canopy has a bigger user base and more features, Karbon is very methodical on the features they release. However, Karbon offers deeper integration with your email and direct integrations with top software. If you're

looking for a more economical solution Canopy could be a good choice since they offer modular pricing. At the end of the day, to pick the right practice management system for your business, list out what functionality you need, collect feedback from your team, and make a decision with the data you collected.

Genwise helps accounting firms create together a holistic solution to your operation and technology challenges based on your firm's unique needs. We not only provide solution recommendations, but we work directly with your team to implement and train everyone to ensure a seamless implementation. Genwise sets you and your team for success

to boost capacity, profits, and processes which provide a better experience for both your team and clients. [Sign up](#) here to learn more about how Genwise can help your firm succeed with accounting technologies



Alik Mock, Founder & CEO of Genwise, is a born and raised Texan. He founded a business automation company based in Austin, Texas. Alik has an extensive background in operations, no-code technology, process engineering, marketing, and sales for professional services companies.

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Protecting Yourself and Loved Ones from Scammers

By Diana Castro, CPA, CFP®



Photo: Canva.com

Earlier this year, the “Tinder Swindler” made headlines as his story was made into a Netflix documentary. The alleged conman had used dating apps, claiming in his profile he was the son of a billionaire family who had made their fortune in diamonds. Under this guise, he would start relationships with women and then request money to help him out of various situations such as being in danger due to his wealth. In total, between cash and having women pay for his lifestyle, it is estimated he scammed women out of \$10 million.

Reading this, you might wonder how someone would believe a billionaire’s son would need to use a dating app, much less need your assistance financially. In addition, the family did not actually have a son by the name he was using in his profile which could probably be verified with some due diligence.

Now, I have not watched the documentary, but it goes to show how easy it is for people to become victims when information is presented to them in a way that resonates. Statistics show that scammers are getting more sophisticated in pulling off their schemes. Luckily, there are some basic steps you can take to protect yourself and your loved ones from being the next victim.

What Is a Scam and How Is it Perpetuated?

A scam is a plot designed to deceive the victim into providing personal information and / or sending money to what they believe to be a legitimate individual or cause. In some cases, the victim might be used as the intermediary so the perpetrator can disguise their illegal activities. Scammers use a variety of communication techniques to reach potential victims – phone calls, emails, social media and online platforms, and mail – in an attempt to appear to be from a credible party.

Who Is targeted?

Victims generally fall into two categories: Seniors and vulnerable individuals. Scammers believe Seniors have savings or income sources that younger individuals might not have. According to FTC estimates, Americans age 60+ lost at least \$602 million to various schemes in 2020. When thinking about vulnerable individuals, you may think of someone who has diminished capacity or less education. Vulnerable individuals can also include those who are emotionally vulnerable due to recent circumstances such as a divorce, loss of a loved one, dealing with a health issue or natural disaster.

Types of Scams and Things to Do to Help Protect Yourself:

- **Romance / marriage / sweetheart** – Generally, these scams start online on a legitimate platform where the scammer attempts to get the victim emotionally invested in a short time frame.
 - ▶ Investigate the profile, especially ones that are newly created. Search the images used in the profile by right clicking on the image to search through a web browser to see if it is associated with other profiles.
 - ▶ Keep communication through the app or online account. Early suggestions or insistence to move to an unmonitored platform such as email or text could be a warning sign. The other party avoiding phone calls or in-person meetings is another.
- **Sweepstakes / lottery** – The scammer makes contact about a prize that requires a fee to cover taxes, shipping and handling, etc. before you can claim the prize. Or you may be required to provide proof of identity, including bank information.
 - ▶ Ensure the prize is for a contest you entered.
 - ▶ Prior to depositing any monies received, investigate the sender through websites like the Better Business Bureau.
 - ▶ Do not provide any personal or bank information. It is illegal for a prize to require payment.
- **Government impersonations** – These aggressive scammers use people's fear of certain agencies like the Internal Revenue Service (IRS), Social Security Administration (SSA) or law enforcement such as a local court or police department to get what they want. COVID-19 has only increased opportunity for fraud in this area.
 - ▶ Most government agencies communicate by mail and provide you time to act in good faith. Any call, text or email should be considered suspicious, even if caller ID shows what appears to be a legitimate name.
- ▶ Avoid clicking on any links from the above-mentioned suspicious communications.
- ▶ Do not send money or provide your personal and bank information. Requests for payments in gift cards, cryptocurrency or cash are fake, and are not used by actual governmental entities.
- ▶ Only communicate with the agency through a verified phone number.
- **Investment scams** – Someone connects to you via a mutual acquaintance and claims to have an investment opportunity with high upside and little to no risk.
 - ▶ Contact your advisory team to discuss any investment opportunities presented to you.
 - ▶ Do not be pressured to make a decision about the investment quickly.
 - ▶ Verify the investment professional on a site such as FINRA or other regulatory website.
- **Tech or fraud support** – A scammer poses as an employee of an established company to get you to pay for services or repairs or to gain access to your computer. For example, a pop-up may appear on your device from McAfee with a link to remove malware, and then the scammer pressures you to pay for a service you do not need.
 - ▶ Legitimate companies do not proactively contact you to notify you of malware or viruses on your device. Do not click on any links or call the number in a pop-up, text message or email as it is fraudulent.
 - ▶ Shut down your browser or device if you receive a scam pop-up. Do not follow the prompts to reopen any previously closed sites.
- **Other Scams**
 - ▶ Fake charities or crowdfunding sites
 - ▶ Real estate – closing transactions, fictitious properties, fake buyers / renters
 - ▶ Employment and job opportunities

How Do I Protect Myself?

- Let us and your custodian be a second set of eyes. Set up a trusted contact(s) so that we can reach out to that individual should we have concerns about activity in your account(s). Note that a trusted contact does not have authority to transact on your account.
- Review your online presence and consider what personal information is available and to whom. Consider adding privacy settings to your social media accounts.
- During any interaction, take the time to pause, think and ask questions to verify information.

Overall, the FTC estimates 1 in 10 adults in the United States will be a victim every year. Therefore, pay special attention to those in your life who have things going on. Even the savviest person might become unaware of warning signs as they navigate difficult times in their life. Together, we can help you protect your assets and those of your loved ones by looking out for each other.



Diana Castro, CPA, CFP® is a Senior Associate Advisor at Goodman Financial. Diana's responsibilities include working with clients directly, addressing their financial planning needs. Prior to joining Goodman Financial in 2019, Diana worked as a Para Planner at a Houston-based RIA firm. In addition, she has approximately 15 years of experience working in corporate tax.



2022

PERSONAL FINANCIAL PLANNING CONFERENCE

Join Financial Planners, CPAs and members at the 2022 Personal Financial Planning Conference on October 20, 2022, at the TXCPA Houston Training Facility to gain valuable knowledge that will help you help your clients make better financial decisions no matter what financial stage of life they are in.

What You Need to Know

Date: Thursday, October 20, 2022

Time: 8:00 a.m. - 5:00 p.m. (Central Time)
Virtual option will be offered

Location: TXCPA Houston Training Facility
1233 West Loop South, Suite 1425
Houston, TX 77027

CPE Hours: 8 hours

Prerequisite: None

Level of Instruction: Update/Overview

Course Objective: To provide Financial Planners, CPAs and members the tools and resources to make better financial decisions at every stage of life.

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OCTOBER 2022

TUESDAY, OCTOBER 11TH (8 AM – 11 AM)

Financial Planning & Investing 101

Reality Based Investing (3 CPE Hours)

TUESDAY, OCTOBER 18TH (8 AM – 4 PM)

Financial Planning A to Z (8 CPE Hours)

NOVEMBER 2022

THURSDAY, NOVEMBER 3RD (10 AM – 2 PM)

Financial Planning Roadmap – Course Correction

Charitable Gifting & Giving Strategies (4 CPE Hours)

THURSDAY, NOVEMBER 15TH (11:30 AM – 1:30 PM)

Tax Efficient Investing (2 CPE Hours)

DECEMBER 2022

THURSDAY, DECEMBER 1ST (11:30 AM – 1:30 PM)

Market Update

Tax & Investment Planning, Ages 55-72 (2 CPE Hours)

THURSDAY, DECEMBER 8TH (8 AM – 11 AM)

Equity Compensation: Taxation and Planning

Financial Planning & Investing 101 (3 CPE Hours)

Space is limited!

This firm is not a CPA firm. Goodman Financial is a fee-only Registered Investment Adviser (RIA). Registration as an adviser does not connote a specific level of skill or training. More detail, including forms ADV Part 2A & 2B filed with the SEC, can be found at www.goodmanfinancial.com.



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Chapter News - Student Auxiliary

**RESERVE
YOUR
SPOT!**



The TXCPA Houston Student Auxiliary provides career training, career path options and information, networking, and hiring opportunities for Houston-area students interested in accounting. Learn from industry and public practice professionals about lucrative and exciting careers that await you. Reserve YOUR spot for these fast-paced roundtables and panel discussions today!

Data Analytics for Impact

How to use data to inform decisions and performance improvement in the workplace. Who better to explain the uses than Donny Shimamoto, CPA, CITP, CGMA, the founder and managing director of IntrapriseTechKnowlogies. Donny is a recognized thought leader and educator in the Accounting Technology, IT Risk Management, and Performance Management fields. Donny is a favorite SAUX speaker each year. Don't miss his virtual appearance on **September, 30 from 6-7 p.m.**

Be Audit You Can Be

Are you considering a career in audit? What does the audit career path look like? EY Partner Joe Jett is hosting the event. Register now to visit the EY Houston office and enjoy stories from accounting professionals on **October 13 from 6-8 p.m.** You must register by October 12 to receive details for parking validation and arrival instructions.

Everything Is Bigger in Taxes

You can tell a lot about someone by their tax return. Are they single, married, or have solar panels, for example? Join tax professionals on Zoom on **October 28 from 6-8 p.m.** to learn about the several different tax practice options and explore the possibilities with guest panelists Katherine Rodriguez, CPA, CFE; Kelley Lau, CPA; and Ugo Onwudiegwu, CPA, JD.

It's Personal Planning Your Financial Future + Fall Social

Make your pennies count at this personal financial planning workshop on **November 4 from 3-4 p.m.** Ryan Firth, CPA/PFS, CFP®, CCFC, GFP(USA), RLP®, president of Mercer Street Personal Financial Services will walk you through future budgeting processes, banking, and other financial matters in your future.

Even if you can't attend the Personal Financial Planning workshop, stop by the TXCPA Houston office **from 4-6 p.m.** to enjoy food, beverages, games with prizes and meet other accounting students and professionals!

If you have questions, please contact [Carol Spencer](#).

[View Schedule & Register](#)

Join our GroupMe!



Chapter News

Young Professionals

TXCPA Houston Young Professionals offer an engaging community where CPAs and aspiring CPAs under 40 can network with other young CPAs, serve the community together and facilitate the mentorship of future CPAs. If you would like information about joining the Young Professionals Committee, contact TXCPA Houston Membership Manager Carol Spencer at cspencer@txcpahouston.cpa.

[Click here](#) to view Young Professional events!



Ascend into Fall Joint Networking Social with Ascend Houston on Sept. 1



Summer Wine Down at Total Wine on July 19



Pavan Mediratta, Gold Sponsor SolomonEdwards with door prize winner, John Steffes, Forvis.

Engery Conference

TXCPA Houston held the 2022 Energy Conference on Thursday, August 25, 2022, at the Hyatt Regency Houston Westside. Over 200 participants attended in person and online to gain valuable insights into the Houston energy sector. Angela Gildea, ENR Regional Co-Leader for Americas, KPMG, and Oil & Gas Journal's Top 25 Most Influential Women in Energy for 2022 began the conference with her captivating session, *Maintaining Resiliency in Uncertain Times*.

Thank you to the 2022 Energy Conference Energy Committee, sponsors, and staff. Without you, we wouldn't be able to bring the latest news and trends in accounting and energy.

Chapter News

TXCPA Houston Past Presidents



Back row:

Don Clanton, 1987-88
Ramsey Womack, 2019-20
Mike Viator, 1995-96
Reed Wood, 1986-87
Bob Sweeney, 1998-99
Bob Ogle, 1991-92
Mike Hilliard, 2007-08
Pat Durio, 2003-04
Bill Frazer, 2006-07
Steve McEachern, 2004-05

Middle row:

Mark Lee, 2012-13
Charlotte Jungen, 2022-23
Melissa Frazier, 2000-01
Joe Joyce, 1999-2000
Billy Atkinson, 1993-94
Ray Frierson, 2002-03
Steve Goodman, 1996-97

Front (seated):

Kathy Ploch, 2009-10
David Acosta, 2010-11
Carol Warley, 2014-15
Mohan Kuruvilla, 2018-19

Happy Anniversary!

Congratulations to TXCPA Houston members who are celebrating membership of 50 years or more (five-year increments). Thank you for your many years of engagement and support!

60 Years - Charles Kiker, Jr., CPA

55 Years - Roy Seaberg, Jr., CPA

50 Years - Cliff Cavett, CPA

Chapter News - Upcoming Events

A promotional poster for a baseball game. The background shows a baseball player in a white pinstriped uniform swinging a bat. The text is overlaid on a dark blue rectangular area. At the top right is the TXCPA HOUSTON logo. Below it, the text 'Family-friendly Event' is written in a cursive font. The main title 'Space Cowboys vs Oklahoma City Dodgers' is in a bold, white sans-serif font. Below the title, the date and time 'TUESDAY, SEPT. 20, 2022 | 6:00 - 8:30 P.M.' and the location 'CONSTELLATION FIELD' and '1 STADIUM DR., SUGAR LAND, TX 77498' are listed in white. At the bottom, a white button contains the text 'Register at bit.ly/HOZMD8L23'.

Sugar Land Space Cowboys Outing Family-friendly!

Join other members on **Tuesday, September 20, 2022, from 6:00 - 8:30 p.m.** at Constellation Field, for a family-friendly outing to see your Space Cowboys pit their talents against the Albuquerque Isotopes. August's outing suffered inclement weather and now we are ready to play ball!

- The Astros Triple-A affiliate team
- Bring the family!
- \$5 Frozen alcoholic beverages

Fees: Member fee - \$12 | Guest fee - \$20 Fee includes a voucher for a hot dog, chips, and soft drink. Optional \$3 parking voucher.

Registration is required by September 19!

[Register here](https://bit.ly/HOZMD8L23)

Bowling Fun for Members and Students!

STRIKE up a conversation with fellow members when you join us for a fun night of bowling & networking on **Wednesday, September 21, 2022, from 6:00 – 8:00 p.m.** at Bowl & Barrel City Centre. Prizes for the highest scores!

Registration includes bowling, shoe rental, light bites, and soft drinks. Cash bar for other beverages. Members and Young Professionals attend for only \$15 and Students are free!

Members - [Register here](https://bit.ly/HOZYP92L23)

Students - [Register here](https://bit.ly/HOZYP92L23)

Not a member yet? Take advantage of free student membership. [Click here](#) to become a member.

A promotional poster for a bowling event. The background is dark blue with yellow and white bowling-related icons: bowling balls, pins, and a bowling lane. The text is overlaid on a white rectangular area. At the top right is the TXCPA HOUSTON logo. Below it, the text 'LET'S STRIKE UP SOME FUN!' is written in a bold, white sans-serif font. Below the title, the date and time 'Sept. 21, 2022 | 6 - 8 P.M.' and the location 'Bowl & Barrel City Centre' and '797 Sorella Ct, Ste 118' are listed in white. At the bottom, a white button contains the text 'Register at bit.ly/HOZYP92L23'.

Join Us!



4TH ANNUAL FALL FUNDRAISER

"Par"tners in Education TopGolf Challenge

TOPGOLF HOUSTON-KATY
Thursday, November 10, 2022
5:00 P.M. - 8:00 P.M.

Join us for TXCPA Houston's fourth annual Fall FUNdraiser on Thursday, November 10 at 5 p.m. at TopGolf Houston-Katy for an evening of fun, food, and prizes. Our "Par"tners in Education TopGolf Challenge benefits CPAs Helping Schools grant program in the thirteen-county membership area. Since 2002, CPAs Helping Schools has reviewed over 750 grant applications, awarding funding in excess of \$750,000 to over 240 school programs. CPAs Helping Schools provides funding to local school districts for educational projects, while emphasizing aid to underserved schools, and volunteers participate in career day presentations at local schools to encourage accounting careers. [LEARN MORE HERE](#)

5:00 p.m. Fajita Fiesta
6:00 p.m. TopScramble
7:15 p.m. Free Play
7:45 p.m. Player recognition awards
8:15 p.m. Silent Auction Ends

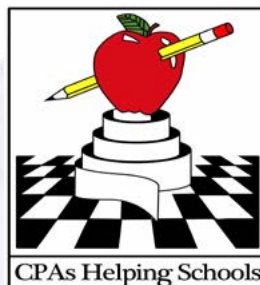
Anyone may participate, including non-players
(no golf experience required)

Player: \$100

Caddie Spectator: \$50

[CLICK HERE](#) for sponsorship package rates!

Net proceeds benefit educational programs for grades PreK-12 in the TXCPA Houston thirteen-county membership area.



To register please email Carol Spencer at cspencer@txcpahouston.cpa or call TXCPA Houston at 832-831-9232.



"Connecting Future Leaders" Professional Development & Networking Program

Join TXCPA Houston's four-week leadership program to enhance your leadership skills and build your professional network. Accelerate 2022 begins on October 26 with an opening meet and greet mixer at the new Houston Chapter training facility.

Who Should Attend?

Current and future leaders who want to take their next career steps, newly promoted professionals (manager level). Participants must be a current member in good standing with TXCPA Houston; and either be: 1) a Certified Public Accountant with at least six years of post-graduate, full-time work experience in public accounting or industry; OR 2) a non-CPA with a minimum of six years of post-graduate, full-time work experience..

Cost: \$500 TXCPA Houston Members, \$625 Nonmembers

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

Class Size: Limited to 20 current and future leaders of the accounting, legal, and finance professions

Classes are held on Thursday morning, from 7:30 to 10:30 a.m. on October 27, November 3, 10, and 17.

Program Overview Each session builds upon the other, starting with an individualized personality assessment from The Birkman Method and self-awareness, followed by conflict management and interpersonal communications

[Click here](#) for the complete schedule and additional information.

For information, contact Membership Manager Carol Spencer at cspencer@txcpahouston.cpa.

Apply here by September 30.



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Chapter News

Upcoming CPE Events

Click title links below to view course descriptions and to register.

| Date | Course Title | CPE Hours |
|------------|--|-----------|
| 09/22/2022 | Market Update and Tax & Investment Planning, Ages 55-72 - In person | 2 hours |
| 09/22/2022 | Northwest Roundtable - Hybrid | 3 hours |
| 09/22/2022 | Social Security Filing Strategies for Your Married Clients | 2 hours |
| 09/27/2022 | Idea Exchange for Finding Employees in Today's Job Market - Virtual | 1 hour |
| 09/28/2022 | CFO/Controllers Conference - Hybrid | 11 hours |
| 09/29/2022 | Equity Compensation: Taxation and Planning Investing - In person | 3 hours |
| 09/29/2022 | Social Security Filing Strategies for Your Divorced Clients - Virtual | 2 hours |
| 09/29/2022 | Ethics for CPAs: It's a Matter of Choice - Virtual | 4 hours |
| 09/30/2022 | 10 Mistakes That Kill Your Deals - Virtual | 1 hour |
| 09/30/2022 | Data Analytics for Impact - Virtual | 1 hour |
| 10/06/2022 | Social Security Filing Strategies for Your Widowed Clients - Virtual | 2 hours |
| 10/11/2022 | Financial Planning & Investing 101 and Reality Based Investing - In person | 3 hours |
| 10/13/2022 | Social Security Recalculations - Virtual | 2 hours |
| 10/18/2022 | Financial Planning A to Z - In person | 8 hours |
| 10/20/2022 | Personal Financial Planning Conference - Hybrid | 8 hours |
| 10/21/2022 | Tax Updates S179D, S45L Cost Segregation Strategies - Virtual | 1 hour |
| 10/24/2022 | Unconscious Bias - In-person | 4 hours |
| 10/27/2022 | Northwest Roundtable - Hybrid | 3 hours |
| 10/27/2022 | Ethics for CPAs: It's a Matter of Choice - In person | 4 hours |
| 10/28/2022 | Captive Insurance - Virtual | 1 hour |
| 11/01/2022 | Managing the Risks That Can Impact Retirement Income - In person | 1 hour |
| 11/01/2022 | Employment Issues Around Remote Workers - Hybrid | 1 hour |
| 11/03/2022 | Financial Planning Roadmap Charitable Giving Strategies - In person | 4 hours |
| 11/11/2022 | New Beneficial Ownership Requirements - Virtual | 1 hour |
| 11/15/2022 | Tax Efficient Investing - In person | 2 hours |
| 11/16/2022 | Ethics for CPAs: It's a Matter of Choice - Virtual | 4 hours |
| 11/17/2022 | Northwest Roundtable - Hybrid | 3 hours |

Chapter News

Upcoming Conferences

CFO/Controllers Conference

September 22, 2022 - Hybrid
Norris Conference Center at
CityCentre

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.

Personal Financial Planning Conference

October 20, 2022 - Hybrid
TXCPA Houston Training Facility

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

Tax Expo - Save the Date!

January 9-10, 2023 - Hybrid
Houston Marriott Sugar Land

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

[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 kondracek@txcpahouston.cpa.

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APP COMPUTING

TXCPA NEWS

July/August Issue of Today's CPA Features Industry Outlook

You should have received your July/August issue of [Today's CPA](#) in your mailbox, but you can also read the latest stories and professional updates in the digital issue online! Don't miss our cover story to learn about TXCPA's 2022-2023 Chairman Sheila Enriquez, JD, CPA-Houston, CFF, CVA. This issue also features a special Accounting Industry Outlook Report that identifies and details some of the top issues impacting the accounting profession landscape in Texas, as well as a CPE self-study article on acquisitions of cloud-based services and products.

TXCPA On-Demand CPE Passport

Looking for convenient access to quality CPE courses at a great value? The TXCPA Passport is for you! This one-year subscription to on-demand programs is available at a special low price of just \$199 for members. CPE hours are offered through programs of varying length. Topics include tax, accounting, assurance, not for profit, fraud and more. [Purchase a passport.](#)

It's Not Too Late to Live the Good Life You Deserve

There is help! It's not too late to live the good life you deserve. We're glad to assist CPAs, CPA candidates and students who want to know whether they might have a problem and talk about solutions. We'll help you locate the professional resources you need to improve your life. Call the Accountants Confidential Assistance Network at 866-765-2226 or [learn more here](#).

STAY CONNECTED

Did You Know That TXCPA Houston Uses the Same Member Database as TXCPA?

TXCPA's shared database offers you the convenience of all continuing education credits in one location for your transcript, provides you with one-stop shopping, and allows our staff to research and help you with questions about events, invoices, payments, and more, whether through the chapter or the state organization.

Unfortunately, if you unsubscribe from one entity's email, that affects the other. If it seems you are getting too many emails from TXCPA and want to put it on hold, that also restricts the chapter from including you on our weekly emails or other mass outreach.

Options? Make the delete key your friend and discard those items that don't offer current interest, or create a special folder for such emails and an auto-forwarding rule so you can review these at your leisure.

If you have questions, please contact Membership Manager Carol Spencer, cspencer@txcpahouston.cpa.

Stay Connected to TXCPA Houston!

Subscribe to the ["TXCPA Houston Weekly News" e-blast](#) (Wednesdays at 5:00 p.m.) to learn about upcoming events, both social and CPE, and news from your Houston Chapter and the TXCPA. Sign up today to stay connected to TXCPA Houston at <https://bit.ly/TXCPA-HTX-EBlast>.

BECOME A MEMBER TODAY

Visit www.tx.cpa/membership/become-a-member

JOIN TODAY!



Classifieds

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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):

- West Houston CPA \$1.1MM, \$650, \$247
- SW Houston \$1MM
- South Texas \$1MM
- NW Houston CPA \$630K, \$550K, \$477K, \$354K
- NE of Houston CPA \$567K
- Galveston County CPA \$316K
- Southeast of Houston CPA \$290K
- SE Texas CPA \$280K
- NE Houston CPA \$190K

CPA PRACTICES FOR SALE

The **Accounting Practice Exchange** is the online marketplace for CPA practices. Get the latest opportunities via our free weekly email alert service. Sign up at www.accountingpracticeexchange.com.

100K TAX PRACTICE FOR SALE

100K Tax Practice for sale. No bookkeeping. Retired but willing to work as needed - especially during transition. All types of tax work.

INTERESTED IN PLACING AN AD IN THE FORUM?

Contact Michelle Carr at mcarr@txcpahouston.cpa for more information.



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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.

[Click here](#) to access the Career Center and start posting jobs or searching for jobs 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

_____ Accounting & Auditing

_____ Business & Industry

_____ CFO/ Controllers Conference

_____ CPE by the Sea

_____ Energy

_____ Forensic & Valuation Services

_____ Healthcare

_____ Personal Financial Planning

_____ Tax Expo

Legislative Affairs Committee

_____ CPA-PAC/ Public Affairs

Membership Related Committees

Work on Society image enhancement, career awareness and member services

_____ Accounting Career Education

_____ Circular 230 Practitioners Roundtable

_____ Diversity & Inclusion

_____ Membership Development

_____ Student Auxiliary

_____ Young Professionals

Philanthropic Committees

Sponsor community and organization events.

_____ Accounting Scholarships

_____ Accounting Scholarship Endowment

_____ CPAs Helping Schools

_____ 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. Complete the form online at bit.ly/Volunteer-Forum. If you have questions, please contact Membership Manager Carol Spencer at cspencer@txcpahouston.cpa.



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