



RIO GRANDE VALLEY CHAPTER TSCPA EDUCATION FOUNDATION

Newsletter - MAY 2009

MEMBERSHIP

The TSCPA will be sending your membership renewal by e-mail towards the end of April. There are several new classes so please read the definitions. You can print your dues statement from the online website and send a check or you can pay it online with a credit or debit card. We urge all of our members to check their personal information on the TSCPA website at www.tscpa.org and update their information. When you log onto the TSCPA website highlight "My Membership" located directly below "CPA" and select "Update My Records". Confirm your "home and contact information" and your "firm and professional contact information". Changes to the latter will be e-mailed directly to Member Services at the TSCPA. For those of you who really do not like to receive emails I ask that you reconsider. Not only will you miss some very important information from the TSCPA, your friends and family as well as your clients, you will also miss information from us – your Chapter.

Also, please note that to be eligible for the coming year season pass and seminar member rates, outstanding invoices for CPE late fees & no show fees as well as seminar fees and 2009-2010 dues must be paid! If you wish to purchase membership for your student/candidate non-CPA employees at \$20 each, please contact the TSCPA Member Services for an application.

The TSCPA is offering free membership to newly-licensed Texas CPAs. If they are eligible & activate their free memberships now, they will receive benefits through May 21, 2010. Please contact TSCPA Member Services for an application.

TSCPA Member Services Information:

Voice – 1-800-428-0272

ganwuzia@tscpa.net

Membership in a professional organization provides many benefits over and above a reduced rate for continuing education courses. The TSCPA spends a lot of time researching proposed laws, educational issues and the best ways to help your clients.

Winners of the annual TSCPA Accounting Excellence Awards are Andrew Gillett of UTPA and Arabella Quezada of UTB.

RIO GRANDE VALLEY CHAPTER OFFICERS AND DIRECTORS JUNE 1, 2009 – MAY 31, 2010

President	Lorena Castillo	Director	Cheryl Bellamy
President Elect	Randy Crews	Director	Barbara Miller
Vice President	Ben Pena	Past President	Tony Villeda
Secretary	Bill Ruppert	TSCPA Director	Jeannette Smith
Treasurer	David Segovia		Tony Villeda

TSCPA COMMITTEES

Advanced Estate Planning Council	Valda S. Rispoli
Awards	Ruth S. Gonzalez-Cherry
Chapter Coordinating Steering	Jeannette P. Smith
External Relations/Image Issue	Manuel B. Garcia
Legislative Advisory	Rance G. Sweeten
Legislative Regional Coordinators	Rance G. Sweeten
Membership	Bill Ruppert
Professional Standards	Wayne D. Beneke
Relations with Educational Institutions	Carol B. Collinsworth
Single Audits & Governmental Accounting Conference	John W. Darcy
Strategic Planning	Patsy Gayken
Texas CPA Tax Institute	Jeannette P. Smith
Texas School District Acct. & Auditing Conference	Carol B. Collinsworth
	Denise Y. Almon

Featured board members (more in the next newsletter):

Lorena Castillo was born and raised in McAllen and received her BBA in Accounting from UTPA in 1992 and became licensed in 2003. She became a partner in the firm of Negrete & Castillo, LLP in January. Along with being an active member of the TSCPA – RGV Chapter, she is a member of the AICPA and serves on the State Bar of Texas District 12B Grievance Committee as a Public Member. Her community involvement includes serving as a board member of Affordable Homes of South Texas, McAllen Housing Authority and the Children's Advocacy Center of Hidalgo County (Estrella's House). She is also past president of the Junior League of McAllen.

Ben Pena is from Mission and graduated in 1996 from UTPA with a BBA in Accounting. Currently he is an Audit Manager for Burton, McCumber & Cortez in McAllen. He is a graduate of Leadership McAllen and currently serves as Treasurer on the Executive Board. He is also an Area Director for Gideons International. He is married to Sonia and they have 2 boys – Ben Jr. and Leonel. For relaxation Ben runs, fishes and enjoys photography. He recently ran the San Antonio R&R Marathon while raising funds for the Leukemia & Lymphoma Society's blood cancer research. Way to go, Ben!!

Randy Crews was raised in Abilene, TX and went off to serve in the Marine Corps in 1991. He moved from California to McAllen in 1998. Randy is involved with numerous charities and is a Board Member for Friends of the McAllen Memorial Library. He has just recently been added as a Key Person with the TSCPA's Political Action Committee. Randy has also been involved with national talk show host and radio commentator Dave Ramsey. Dave has made Randy an Endorsed Local Provider for the Rio Grande Valley.

Barbara Schwarz Miller is a certified public accountant with 29 years of experience in public and private accounting and currently is an accountant at the Marine Military Academy in Harlingen. Barbara serves as a director at Magic Valley Electric Cooperative, where she is secretary-treasurer and a member of the Finance Committee. She also serves on the City of Mercedes Comprehensive Planning Committee and is a member of the American Institute of Certified Public Accountants and the TSCPA. Barbara is a 1978 graduate of the University of Texas – Pan American and a 1974 graduate of Mercedes High School. She and her husband, Michael, reside in Mercedes and have three sons.

RGV CHAPTER CPE PROGRAMS FOR JUNE 2008 – MAY 2009

- May 21 – Leita Hart-Fanta: Interviewing Skills for Auditors (8 hours); the registration form is attached

SOUTH TEXAS COLLEGE & LONG CHILTON, LLP CPE

Retreat at the Beach – III A Smart Solutions Forum on Fiscal Fitness

Scheduled Presenters include:

Charles Yaple ---- Paul Glick ---- David Holt ---- other guest speakers and presenters

May 28th and 29th, 2009 Sheraton – South Padre Island

Look for upcoming registration information and other details, or contact
Juan Carlos Aguirre – South Texas College 956-872-6782 jcaguirr@southtexascollege.edu
Registration Deadline = May 18, 2009

RGV CHAPTER CPE PROGRAMS FOR JUNE 2009 – MAY 2010

- June 29 – David Holt: Ethics (4hrs) & Non-profit Organizations Update (4 hrs)
- June 30 – David Holt: Accounting & Auditing Annual Update (8 hrs)
- July 23 & 24– Steve Tillinger: S Corporation Tax Issues & Update (16 hrs)
- August 13 – Larry Jones: “How To” on dealing with the IRS, Representing Clients in Trust Fund Recovery Penalty Cases, Update on how to deal with IRS Collection Division, How to Handle Potential Criminal Case, Working the Audit, switching the burden, and keeping the privilege, The Practical World in Dealing with the IRS (8 hrs)
- September (TBD) – Robert Mendell: LLCs, Closely Held Corp, FLP (8 hrs)
- September (TBD) – Robert Mendell: Business Acquisitions, Succession Planning (8 hrs)
- October 27 CPE EXPO – Fritz Atameyer: 2 hour classes on Margin Tax Update, E-Commerce Act, FIN 48, and Updated FASB standards coordinating with IFSB (8 hours total); David Holt: Compilation & Review (Revised 2009), The New Fair Value Accounting Rules (New for '09), CSI for CPAs
- November 13 – Greg Enos: Texas Divorce (8 hrs) (not set in stone yet)
- November 30 – Steve Tillinger: Federal Tax Update (8 hrs)

CPE REGISTRATION FORM - SPONSOR NO: 001283

INTERVIEWING SKILLS FOR AUDITORS

MAY 21, 2009

BEST WESTERN PALM AIRE - WESLACO

REGISTRATION BEGINS AT 8:00 am

Course Description: The new risk assessment SASs ask us to focus our audit work on risky processes and inadequate controls. Interviews are a key tool in uncovering risk and gaining an understanding of the client's operations. But how do you keep the interview on track and efficient? And how do you use the results of the interview to shape your audit methodologies? In this full-day session, enjoy working designing focused interview questions and relevant methodologies.

Topics include:

- How to maintain positive client relations while getting your work done
- How to prepare for an interview
- How to keep your interview focused
- How to design questions that will uncover risk

Leita Hart-Fanta, CPA, CGFM makes finance & auditing fun & easy. She converts the complex topics of accounting, finance, auditing, & strategic planning into information that professionals can absorb & use. Leita, author of *Accounting Demystified*, *The Four Principles of Happy Cash Flow*, & *STEP-by-STEP: Building a Persuasive Audit Report*, has owned & operated Leita Hart-Fanta, CPA, a training & professional development company, since 1995. She conducts & develops courses on balanced scorecard management, audit supervision, financial analysis, budgeting, business writing, finance for non-financial managers, cash flow, presentation skills, government auditing standards, & client relations. A graduate of UT Austin with a BBA, Leita serves on the conference planning committees of the local chapters of the Institute of Internal Auditors & the TSCPA.

- Type or print legibly. Cost includes lunch, refreshments & course materials.
- If you are a season pass holder, fax your registration to (956) 546-1772
- If you are **not** a season pass holder, please mail your registration & payment to:
RGV Chapter of the TSCPA Education Foundation
943 North Expressway, Suite 15-161
Brownsville, Texas 78520

Name: _____

CPA: Yes [] No []

Firm: _____

Phone: _____

Address: _____

Email: _____

City/Zip: _____

TSCPA Member #: _____

_____ Season Pass Holder	\$0	_____ TSCPA Student Member	\$110
_____ TSCPA CPA Member	\$125	_____ TSCPA Floating Pass	\$0
_____ Non CPA Employee	\$125	_____ Non-Member	\$250

❖ Late Registration: Friday, May 15, 2009

CPE FEES FOR JUNE 2009 – MAY 2010

Good News – there will be no increase in the fees charged for the CPEs this year. Your Board of Directors is committed to offering quality CPEs at a rate that is greatly discounted to members over other live CPA seminars found elsewhere. You can purchase a single 8 hour course at the terms and rates as described below. Non Member CPAs will continue to be charged \$250.00 for a single 8 hour course.

TERMS, CONDITIONS & BENEFITS – INDIVIDUAL SEMINAR RATES

	MEMBER RATE	STUDENT/CANDIDATE RATE
ELIGIBILITY	CURRENT TSCPA MEMBER AND TSCPA MEMBER'S NON-CPA EMPLOYEES	CURRENT TSCPA ASSOCIATE MEMBER (STUDENT OR CANDIDATE)- (NOT A CPA)
FEE	\$125 PER SEMINAR (8 CPE CREDITS)	\$110 PER SEMINAR (8 CPE CREDITS)
PRE-REGISTRATION	US PO - MUST BE ACCOMPANIED BY A CHECK.	US PO - MUST BE ACCOMPANIED BY A CHECK.
ON SITE & LATE REGISTRATION	\$5 LATE FEE – NO GUARANTY OF COURSE MATERIAL	\$5 LATE FEE – NO GUARANTY OF COURSE MATERIAL
SUBSTITUTION	ALLOWED FOR FULL DAY PROGRAM WITH PRE-NOTIFICATION	NO CHARGE TO SUBSTITUTE WITH STUDENT/CANDIDATE. PAYS \$15 TO SUBSTITUTE WITH "MEMBER ELIGIBILITY"
CANCELLATION	REFUNDED IF NOTIFIED BY CANCELLATION DATE. CARRY OVER TO FUTURE SEMINAR IF NOTIFIED PRIOR TO SEMINAR DATE (NOTE: USE IT OR LOSE IT BY 5/31/2010)	REFUNDED IF NOTIFIED BY CANCELLATION DATE. CARRY OVER TO FUTURE SEMINAR IF NOTIFIED PRIOR TO SEMINAR DATE (NOTE: USE IT OR LOSE IT BY 5/31/2010)
NO SHOW	REGISTRATION FEE - NON REFUNDABLE	REGISTRATION FEE - NON REFUNDABLE
CPE EXPO	\$125 REGISTRATION FEE – GOOD FOR 1 TO 4 CLASSES	\$110 REGISTRATION FEE – GOOD FOR 1 TO 4 CLASSES

At the last TSCPA meeting in Austin, the leadership made reference that they are always surprised year-after-year at how much CPE our "small" Chapter offers. Other small chapters offer anywhere from 8 – 24 hours of CPE & other medium Chapters offer up to 50 CPE hours while we continually offer CPE credits in the range of large chapters. We're also the only ones offering a season pass that allows you to take as many courses as you like. The cost of our season pass will only buy @ 3.5 classes offered by other Chapters. So, please take advantage and enjoy!

Standard and Floating Season Passes can now be purchased and will provide the recipient up to 96 hours of quality CPE. Please read the terms and condition listed below.

TERMS, CONDITIONS & BENEFITS-SEASON OR FLOATING PASS

	STANDARD SEASON PASS	FLOATING SEASON PASS
ELIGIBILITY	CURRENT TSCPA MEMBERS AND TSCPA MEMBER'S NON-CPA EMPLOYEES	CURRENT TSCPA ASSOCIATE MEMBER (STUDENT OR CANDIDATE)- NOT A CPA
FEE	\$500 FOR UP TO 96 CPE CREDITS	\$400 FOR UP TO 96 CPE CREDITS
ISSUED TO	INDIVIDUAL	FIRM (OR INDIVIDUAL)
PRE-REGISTRATION	REQUIRED – BY FAX, EMAIL OR US PO	REQUIRED – BY FAX, EMAIL OR US PO
ON SITE & LATE REGISTRATION	\$5 LATE FEE – NO GUARANTY OF COURSE MATERIAL	\$5 LATE FEE – NO GUARANTY OF COURSE MATERIAL
SUBSTITUTION	NO SUBSTITUTIONS OR SHARING OF PASS	FIRM - ANY TSCPA AFFILIATE STUDENT OR CANDIDATE MEMBER EMPLOYEE. INDIVIDUAL - NO SUBSTITUTION PRIVILEGE
CANCELLATION	NO PENALTY IF NOTIFIED PRIOR TO CLASS	NO PENALTY IF NOTIFIED PRIOR TO CLASS
NO SHOW	\$15 NON CANCELLATION FEE	\$15 NON CANCELLATION FEE
CPE EXPO	MAY REGISTER FOR 1 TO 4 CLASSES	MAY REGISTER FOR 1 TO 4 CLASSES, & APPLIES TO ONLY ONE PERSON

RGV CHAPTER
SEASON PASS APPLICATION

NAME: _____ CPA: Yes [] No []

FIRM: _____ PHONE NO: _____

ADDRESS: _____ FAX NO: _____

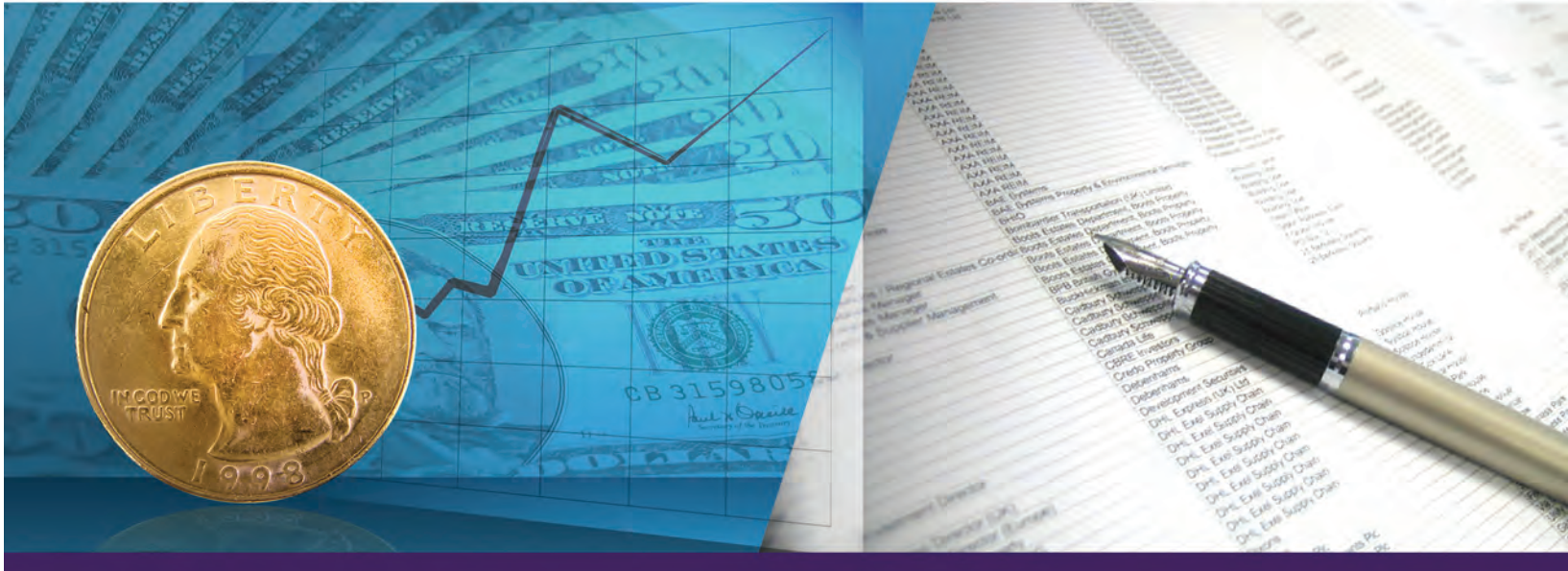
CITY/ZIP CODE: _____ EMAIL: _____

TSCPA MEMBER NO: _____

SEASON PASS PURCHASE June 1, 2009-May 31, 2010	CHECK ONE	
Season Pass purchase – TSCPA Member	[<input type="checkbox"/>]	\$ 500.00
Season Pass–Non CPA employee (Employee is not a TSCPA member)	[<input type="checkbox"/>]	\$ 500.00
Floating Season Pass–Non CPA Student/Candidate TSCPA Member	[<input type="checkbox"/>]	\$ 400.00

MAKE CHECK PAYABLE AND MAIL TO:

RGV Chapter of the TSCPA Education Foundation
943 North Expressway, Suite 15-161
Brownsville, Texas 78520



SOUTH TEXAS COLLEGE
CONTINUING AND PROFESSIONAL EDUCATION
in partnership with

BECKER CPA REVIEW and TEXAS SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS - RIO GRANDE VALLEY CHAPTER

Proudly bring to the Rio Grande Valley for the fourth time

BECKER CPA EXAM REVIEW COURSE

EXAM PART	CLASS DATES (Saturdays)	CLASS TIMES	LOCATION
Business	April 18, 2009 April 25, 2009 May 2, 2009	8:30 am to 12:30 pm 8:30 am to 5:00 pm 8:30 am to 5:00 pm	STC Pecan Campus Building J - Room 2.212 3201 W. Pecan Blvd. McAllen, TX
Financial	May 30, 2009 June 6, 2009 June 13, 2009 June 20, 2009 June 27, 2009	8:30 am to 12:30 pm 8:30 am to 5:00 pm 8:30 am to 5:00 pm 8:30 am to 5:00 pm 8:30 am to 5:00 pm	
Audit	July 18, 2009 July 25, 2009 August 1, 2009	8:30 am to 12:30 pm 8:30 am to 5:00 pm 8:30 am to 5:00 pm	
Regulation	August 22, 2009 August 29, 2009 September 12, 2009 September 19, 2009	8:30 am to 12:30 pm 8:30 am to 5:00 pm 8:30 am to 5:00 pm 8:30 am to 5:00 pm	

For information about the course, call Juan Carlos with STC at (956) 872-6782.

For scholarship information and applications, visit the RGV TSCPA student page at www.rgvcpa.org

Cost of the course: \$2,825 (includes textbooks and software); you may be eligible for a discount and financing!

To register for the course and to apply for financing, call (877) CPA-EXAM (272-3926).

For eligibility requirements to sit for the CPA exam, visit www.tsbpa.state.tx.us. For additional resources visit www.beckercpa.com.



Rio Grande Valley Chapter of the TSCPA
Education Foundation
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TSCPA ANNUAL MEETING

Every Chapter member is urged to attend the TSCPA Annual Meeting of Members, to be held June 26-27 at the Marriott Rivercenter in San Antonio. Details and registration forms are available on the TSCPA web site.