

November 2022

Iowa CPA

Newsletter from the Iowa Society of CPAs, your primary source for profession-related information

Accounting Opportunities Week takes shape

Your Iowa Society of CPAs is excited to be partnering with other state CPA societies across the country and AICPA to raise awareness of the accounting profession among high school students.

To support these efforts, we asked the governor to proclaim Nov. 7-11 as “**Accounting Opportunities Week**” in Iowa, a week dedicated to helping Iowa students better understand the career opportunities in the accounting and CPA profession.

With trends continuing to show fewer students choosing to pursue accounting degrees, the declining CPA pipeline is one of the most important issues facing the CPA profession today. It's time to inspire the next generation and share the wide variety of career paths available in accounting and why earning a CPA license is worth the time for long-term career goals.

The **Accounting Opportunities Week** campaign will help bring CPAs into high school classrooms with in-person, virtual live or on-demand presentations to help students better understand opportunities in the CPA profession. ISCPA members are volunteering their time to make this a huge success in Iowa.

CPAs, CPA candidates, and accounting majors will visit their local high schools to speak with students about the best part of their career journey, what an average day looks like, how they use their skills to solve problems, and what to expect in college.

To make everything as simple as possible, ISCPA is providing a PowerPoint presentation, talking points and training ahead of the classroom interactions. We are also helping to match the volunteer presenters with teachers requesting speakers from their area.

Today's students are looking for careers that utilize technology, provide a path to entrepreneurship and meet their ethical expectations. We know accounting can check all these boxes, but we need the message to reach high school students.

Our outreach efforts in school classrooms are not limited to this one week! ISCPA's acCOUNTing ME IN program makes it easy to present to local schools throughout the year. Contact Lindsey Haley at lhaley@iacpa.org if you want to get involved and inspire the next generation of accountants.

Accounting Opportunities Week

Nov. 7-11

Share your experience and excitement about the profession with students in high schools across Iowa.

Learn more at www.iacpa.org/aoweb



Iowa Society of CPAs ... Advancing the professional success of our members

Iowa CPAs making community count

Thank you to the many CPAs, co-workers and accounting students who made a positive impact in local communities across Iowa. Since its launch in 2015, the profession-wide community service event has logged well over 13,000 volunteer hours.

Month of Service Participants

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Issue No. 2022-11

Published 10 times per year by the Iowa Society of Certified Public Accountants (ISCPA). Send address changes, advertising inquiries and all correspondence to:

1415 28th St., Ste. 450
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Cover photo by Jim Heemstra.

Continued on page 3

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Month of Service projects



Month of Service Teams

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 West Des Moines
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month of service impact

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IDR updates ISCPA on projects

By Grant Seuferer, ISCPA Taxation Committee

The ISCPA Taxation Committee held its annual liaison meeting with the Iowa Department of Revenue (IDR) on Aug. 10. This meeting is a chance for committee members to ask questions and hear updates from IDR representatives on various projects or concerns.

Taxation Committee Co-Chair Nate Beck facilitated the discussion. The IDR was well represented by a seven-person panel, including Deputy Director Mary Mosiman.

Modernization project

IDR representatives were excited to share updates on the department's multi-year systems modernization project. This project includes an updated taxpayer interface called GovConnectIowa (GCI) as well as improvements to the systems used internally, which will help in areas such as improving audit procedures.

The first of four rollouts occurred last November and included sales and use, withholding, fuel, and local option taxes. Feedback received from stakeholders will result in additional updates expected with the second rollout this November. There is also an independent verifier on site to ensure risks are mitigated and the IDR is responding to concerns appropriately. Notable updates include a single login for accounts of multiple businesses and the ability for taxpayers to provide third party access to tax accounts.

The second rollout is on schedule for implementation in November. This rollout concerns business income taxes including corporations, pass-through entities and franchise taxes. Taxpayers can expect the new system to include the ability to manage accounts, make tax payments,

view balances, request alternative apportionment or voluntary disclosure, and respond to letters.

The third rollout is anticipated for November 2023 and will primarily address individual taxation. The final rollout is scheduled for November 2024 and will primarily address local government distributions. The department representatives urge taxpayers and practitioners to sign up for email updates on the department webpage (<https://tax.iowa.gov>) to stay informed of how the various rollouts will impact users.

Pass-through entity

Another major project for the IDR this year is redesigning pass-through entity tax forms to reflect changes over the last few years. A webinar will be held in November to discuss the changes being implemented in tax-year 2022.

Additionally, new late filing penalties for pass-through entities go into effect in tax year 2022. Traditionally, late filing penalties were based upon tax due, and therefore no penalty was computed on pass-through entities. Going forward, these penalties will be assessed on the entity's imputed Iowa tax due based on Iowa sourced income.

Administrative rules

This fall, the Department is undertaking the task of reorganizing its 1,500 pages of administrative rules into approximately nine titles, grouped by tax type. The reorganization will be an editorial filing effective Nov. 9 and will appear in the Iowa Administrative Code. Included in this project are updates to the website, forms, guidance and training materials. The IDR is also working on communication to help external

stakeholders understand the changes being made, which will likely include a conversion chart and FAQs on the website. Once the reorganization and the second modernization rollout are complete in November, the IDR plans to begin a substantive review to identify rules that have never been modified and may be outdated with a goal of eliminating or updating unnecessary rules.

The Taxation Committee will hold its next liaison meeting with the IDR during the summer of 2023.



Grant Seuferer is a CPA and tax manager at Deloitte Tax LLP in Des Moines. He has been an ISCPA member since 2016.

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Hanging your shingle

How to start your own firm – part 2 of 2

By Zack Ryan, CPA, Value Forward Advisory

The following content is a continuation of this article. Part 1 of 2 appeared in the October issue of Iowa CPA.

Tech, for tech's sake

The only thing you can never get back is time. You can always make more money but cannot make more time. "What is the best use of my time right now?" should always be forefront in your mind. There are a lot of apps out there for accountants. I would design your tech venture around your written plan.

There are numerous timesheet apps. The ones I like best are the project management apps. By being paperless, you won't have files all over the floor to remind you what you must do. So, picking good software is

critical. I recommend picking a tax software for quality and not price. The tax software is like an employee to you and does a lot of the work. Just remember to not go overboard, because there are tons of apps that may look cool and fun but may not be needed for you to accomplish your vision.

Fees, fees, set them fees

Fixed fee or value billing is a small camp but growing in numbers. I am of the mind to charge fixed fees. Hourly billing implies every hour is worth the same to a client. However, we know tax hours will draw a higher premium than, say, data entry. At a small firm, work in March has more value than July. Upfront pricing ensures the client will not be surprised. It also allows the accountant to determine the

scope of the engagement. The price can be changed if the client asks to change the scope.

Accountants are one of the most trusted professionals that companies employ, so get paid for your knowledge, experience and value. I have seen fees all over the board. There is not one right price. That's the beauty of fixed fees; the client can say no and look elsewhere. There will always be clients out there, so make sure you have the ones that want to pay you.

Marketing and sales

Yes, the topics most accountants prefer to avoid. When you are on your own, you are the owner and worker and it is easy to get buried in the work and ignore the management of your firm. Working on

Continued on page 9

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Watch our video at 75percenttaxcredit.com and learn from other CPAs how to reduce your client's income tax liability utilizing Iowa's single largest tax credit.

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Women's event ignites ideas

Thank you to all who attended the **Women's Leadership Forum** on Sept. 30. It was wonderful to be back in person for the half-day event featuring a savvy lineup of speakers. Led by **Jill Andersen**, attendees learned to forget their "shoulds" to be the best leaders possible. **Susan Stutzel** shared how to break through the status quo to face change head-on. **Lisa Even** ended the day sharing how to conquer never-ending to-do lists and manage the pressures of today's fast-paced lifestyle.



Continued from page 8

your firm is more important than working in your firm. To do that, you must network with your clients, peers and other professionals. I look at marketing as the way you promote your brand. I look at sales as how you promote your work. If you do a good job marketing, you do not need to do much on the sales side of the equation.

I remember a story from a broker in the early 2000s. Every new broker was still reading the newspaper and cold-calling people for business. This broker would cut out the news article and laminate it. He would then mail it with a letter congratulating the job change for the executive. He was wildly successful landing business. Why? He talked about the client's success. He did not spend the whole time talking about himself. When clients need help, they want you to listen. I try to talk less than 20% of the time. The client wants you to help them, so you need to listen.

Go start it

The goal of a business is to provide a quality product or service. The profit is the result of that hard work. So go do what you like, and the money will follow.

There is such a high demand for accounting work that one need not buy out a retiring partner. If you do buy a firm, do a lot of due diligence. Avoid a fixed price and push for payment based on retention. You may prefer if it is seller-financed as well. You may have just a few clients to start, and the rest will come from your hard work and networking.

Getting started is easier than you think. It took me a day to get everything set up, from buying a laptop and monitors to subscribing to a dozen online tech services. The AICPA book has examples and a checklist in it. Better firms are better for the industry, so if you want to go make your mark, this is your time.

Zack Ryan, CPA and director at Value Forward Advisory, is a problem solver based in Saint Paul. He has more than 20 years of experience in public accounting. He loves talking about the accounting industry and firm management. You may reach him at 651-333-6140. Reprinted with permission of the Minnesota Society of Certified Public Accountants.



It shouldn't take a six-by-six barn beam crashing through your bedroom wall to find out who you can trust.

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LEAP forward

...Need-to-know news and events for leaders emerging in the accounting profession

Visit www.iacpa.org/membership/young-professionals for detailed information about these events.



Headshot Happy Hour

Grab a friend and, "Say cheese!" Take advantage of networking, refreshments and a new professional headshot on Nov. 15 from 4-6 p.m. at the ISCPA office in West Des Moines. **Headshot Happy Hour** is free and open to all young professionals, but photo appointments are limited to 20 people.

Get details and sign up at www.iacpa.org/happyhour.

Take the LEAP

The LEAP Committee is introducing three new subcommittees to ensure volunteers have an opportunity to focus on their passions within this YP group.

LEAP Mentoring – Mentor future CPAs.

LEAP Community Involvement – Plan and attend service and social activities throughout the year.

LEAP Emerging Leaders – Help shape topics and experts for Emerging Leaders Conference and Lunch with Leaders as a key partner in the planning process.

Watch for more details and reach out if you want to join the fun. Contact Kalli Hurst at khurst@iacpa.org.

Classified ads

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In remembrance

ISCPA offers condolences to the families of:

Sylvester G. Blank, West Des Moines. Syl was a member since 1960.

Tony C. Clark, Urbandale. Tony was a member since 1981.

Welcome!



The following individuals have recently joined the Society. Please take time to welcome them and invite them to participate in events and programs with you. Find these members in ISCPA's Member Directory at www.iacpa.org/membership/directory.

Wendy Borja Diaz

Iowa State University
Ames

Lily DeBates

Principal
Des Moines

Amber Green

Iowa City

Brady Griffin

Rush CPA & Associates
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Cedar Rapids

Melanie Stall

Huxley

Regan Wasson

RSM US LLP
Iowa City

Affiliates**Sadi Gautam**

UHY LLP
West Des Moines

Peter Miller

HNI Corporation
Muscatine

Joe Weiss

Pittman & Company LLP
Urbandale

New Student Affiliates

Buena Vista University

Peyton Schultz

Central College

Kenny Cronin
Jaymi Gibbs
Caleb Hamerlinck
Dillon Hoit
David Leasau
Colin MacGregor
Abbi Roerdink
Mickayla Schlerman
Luke Snyder
Kennedy Tate
Mason Vanatta
Martin Vineyard
Kyler Yarnell
Carson Zitlow

Grand View University

Kieran Snowden

North Iowa Area Community College

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Margaret Klemesrud
Ryan Larson
Brennan Lloyd
Nick Macellaro
Alexa Martin
John Norris
Sam Peters
Dominic Reilly
Josh Roddy
Claire Westphal
Aleks Zeglen

Upper Iowa University

Julie Friesth

Western Iowa Tech Community College

Rachel Daugherty

Members in the news

Tammy Alliman has been hired by LattaHarris LLP, Washington.

Greg Armitage has been hired by Pacific Life Insurance Company, as director of financial reporting.

Lavi Aviles-Strahl has been hired by Robert Half Management Resources, Dubuque, as senior manager.

Tyler Gerstandt has been hired by Cherokee Regional Medical Center, Cherokee.

Devin Harker, Workiva, Ames, has been promoted to financial reporting manager.

Samantha Jankowski has been hired by Iowa State University Foundation, Ames, as director of financial reporting and budgeting.

Nick Schany has been hired by IMT Insurance Company, West Des Moines, as internal auditor III.



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ISCPA staff profile



Kalli Hurst

Position: Learning Coordinator

Alma mater: Iowa State University



How long have you been with ISCPA? I started as the learning coordinator with ISCPA in late June of 2022. Within the first two weeks, I traveled with the team to New Orleans for a conference of state societies from across the country. It was a great way to hit the ground running and integrate with the team quickly. I enjoy that every day on the job is different and brings its own unique challenges.

What is your professional background/experience?

I have an extensive background in hotel banquet management and catering management, as well as special events and wedding coordination. I have a passion for the service and events industry. One of my favorite things is watching the details and preparation come to life the day of an event.

What do you like to do for fun? In my spare time I like to read, travel, spend time with family and play with my chocolate Lab, Scout. I really enjoy cooking and baking. Scotcheroos are my favorite thing to bake. I draw inspiration for my cooking from family recipes as well as from watching cooking shows

on TV. I like to experiment with different spices and use fresh vegetables from my garden in the summertime.

Do you have a favorite vacation destination? My two favorite places I have traveled to are Colorado and Jamaica.

What is the best thing you've read recently? The most recent book I read was 'The Midnight Library' by Matt Haig. One of my favorite books is 'The Life We Bury' by Allen Eskens.

A night out or a night in? I enjoy spending time at home cuddling up with my dog and a good book or movie. On the weekends, you can find me at a family gathering or working on projects around the house. On the occasions I do go out, I enjoy finding somewhere with a pool table to play a few games.

What is one of your goals as an ISCPA staff member? I look forward to meeting new members and Helping inspire younger generations to become CPAs and members of ISCPA.

Meet ISCPA committee chair Jenna Siberz



Iowa Society of CPAs Month of Service Committee Chair **Jenna Siberz** is a CPA and audit managing director at KPMG in Des Moines. Jenna has been a member of the Month of Service committee since 2018 and a member of ISCPA since 2008.

A Charlotte, N.C., native, Jenna received her BSBA in accounting and Masters of Accounting from Drake University in 2007. Jenna and her husband Blake reside in rural Runnells with their children Brody (8) and Brynn (6). Jenna enjoys spending time with her family, watching her kids play sports, gardening and running.

CPE spotlight

Planning early is more important than ever!

We know life gets busy and sometimes that CPE class you intend to register for gets pushed down the to-do list. This is risky! Registering early – at least **25 days** prior – ensures enough registrations are confirmed and helps avoid the risk of course cancellation. Instructor travel is more unpredictable than ever, requiring a booked ticket well in advance to secure a seat. Please help us continue to provide the top-quality education you've come to expect by registering early. It could mean the difference between a course progressing as planned or getting cancelled.

Popular tax course ending in early 2023

After a long history of providing tax update training for state CPA societies and small-to-mid-sized

firms, CliftonLarsonAllen (CLA), vendor of the popular tax course **Tax Advisors Update**, recently announced the training will no longer be offered after January 2023. Andy Biebl and Bob Randweiler began authoring and presenting the course in the 1980s, and CLA continued the tradition following their retirements several years ago. With the CPE environment transitioning through an enormous amount of change, CLA made the difficult decision to phase out of the CPE market.

Don't miss your last chance to attend this course!

- **Dec. 5** | West Des Moines & Live Webcast
- **Jan. 10, 2023** | Virtual Seminar

Earn FREE CPE as coordinator

ISCPA members attending seminars located outside of the Des

Moines area have the opportunity to attend ISCPA CPE seminars for free or receive \$150 for each 8-hour seminar.

When ISCPA staff is not present, an onsite coordinator is needed throughout the day. Duties include staffing the registration table 30 minutes prior to the beginning of class, communicating with facility staff as needed, and returning attendance records to ISCPA following the seminar. All facility arrangements are made in advance. Please consider this opportunity as you plan your CPE schedule. Details at www.iacpa.org/cpe/onsite-coordinator.

Jan. 25 | Save the date

**Iowa CPA
Day at the Capitol**

Watch for more details!



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GET READY FOR TAX SEASON

Nov. 7-8	2-Day Federal Tax Update: Individual and Business West Des Moines or Live Webcast
Nov. 8	The Best S Corporation, Limited Liability and Partnership Update Course Sioux Falls, S.D. or Live Webcast
Nov. 9	The Best Individual Income Tax Update Sioux Falls, S.D. & Live Webcast
Nov. 11	Federal Tax Update-Individuals and Business Live Webcast
Nov. 14	The Complete Guide to Payroll Taxes and 1099 Issues
Nov. 18	Estate and Life Planning Issues for the Middle-Income Client
Nov. 18	Iowa Tax Update West Des Moines & Live Webcast In-person seating limited!
Nov. 22	Schedules K-2 & K-3: Preparing Form 1116 and Other Key Forms
Nov. 28-29	2-Day Federal Tax Update: Individual and Business Cedar Rapids
Dec. 1	Working Paper Documentation-AICPA Tax Staff Essentials
Dec. 5	Tax Advisors Update West Des Moines & Live Webcast Last year this course will be offered!
Dec. 7	Getting Ready for Busy Season: Key Changes Every Tax Practitioner Should Know
Dec. 7	This Year's Best Income Tax, Estate Tax and Financial Planning Ideas
Dec. 12	Preparing Individual Tax Returns for New Staff and Paraprofessionals West Des Moines & Live Webcast
Dec. 13	Tax Forms Boot Camp: LLCs, Partnerships and S Corporations West Des Moines & Live Webcast
Jan. 10, 2023	Tax Advisors Update Last year this course will be offered!
Jan. 18, 2023	State and Local Tax Conference

SAVE THE DATES 2023 conferences!

March 7	Business & Industry Conference
May 5	Leadership Conference and Annual Meeting
May 16	Iowa Governmental Roundtable (virtual)
May 23	Financial Institutions
June 5-6	Technology
June 21	Insurance Industry

Find more events at www.iacpa.org/cpe.

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Listening Hours

Listening Hour with ISCPA CEO Dawn Latham and Carl Peterson of AICPA are scheduled for Nov. 17 from 9-10 a.m. and again Dec. 15. These are great opportunities for members to talk about what is top of mind and to get insight into topics impacting fellow CPAs. Come ready to share, as your input is what makes these beneficial.

Find the details at www.iacpa.org/eventslist.



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2022 Impact Challenge

The **Iowa CPA Education Foundation** provides scholarships for talented Iowa college accounting students. To encourage some light-hearted competition, we are once again calling on donors to name their college of choice for foundation contributions from now through Dec. 15. One school will be crowned this year's challenge champion. Support the Iowa CPA Education Foundation and show some school spirit with the **2022 Impact Challenge**.

1. For every \$10 you donate to the Foundation, the school of your choice is awarded one impact point. Example: \$50 donation = 5 impact points for your chosen college.
2. You must enter your school's name in the comment box with your contribution on the web form found at **www.iacpa.org/foundation**.
3. The college with the most impact points on Dec. 15 wins the 2022 challenge.
4. ISCPA CEO Dawn Latham will sport the winning school's colors for a photo (she's known to be a die-hard UNI fan).



Support the future of the profession by making your donation today! To contribute to the foundation or find information about tax benefits and deductions available, visit **www.iacpa.org/foundation**.