

Feb. 4 Chapter Events

Mini-Seminar

Time: 4:00 - 6:00 p.m.
Location: City County Building
Speaker: Tom McKay
Topic: "Four Roles of Leadership"
Fee: \$10 for members
 \$20 for nonmembers
Subj. Code: M
CPE Hours: 2 hours

Chapter Meeting

Time: 6:00 p.m. - Cash Bar
 6:30 p.m. - Dinner
Location: Calhoun's on the River
Speaker: Anne McKinney, JD
Topic: "Estate Taxes"
Fee: No charge for members
 \$20 for nonmembers
Subj. Code: T
CPE Hours: 1 hour

Menu: grilled lemon chicken, mixed vegetable casserole, Jack Daniels pie

Register by Fri., Jan. 31, at noon.

Register online at

www.tscpa.com/chapter/knoxville
or call 800/762-0272.

Members will be billed for dinner or the mini-seminar when they fail to attend an event without properly cancelling.

Proposed Slate of 2003-2004 Officers Knoxville Chapter Positions

President

Brian Tankersley, Brian Tankersley, CPA, CITP

President-Elect

Bryan Dove, Anderson News

VP-Education

Lee Sherbakoff, The Trust Company

VP-Membership

Linda Jo Pomerance

Secretary

Arthur Carpentier, Team Health

Treasurer

Kevin McCollum, Coulter & Justus

Assistant Treasurer

Mike Heffner, Pugh & Company

Newsletter Editor

Amy Brasfield Marlow, Van Elkins & Assoc., CPAs

Directors-at-Large

Ricky Jackson, Coulter & Justus
Doug Arnold, Pershing & Yoakley

Finance/Budget Committee

Lee Letsinger, Samuel E. Letsinger, CPA
Bill Synder, Bible Harris Smith, PC

Nominating Committee

Scott Dotson, Croley, Davidson, & Huie
Ann Long, Van Elkins & Assoc., CPAs

Chapter Representative to the TSCPA BOD

Sam Letsinger, Samuel E. Letsinger, CPA -
07/01/03 - 06/30/05

Chapter Representative to the TSCPA State Nominating Committee

Karen Hellmund, Van Elkins & Assoc., CPAs -
07/01/03 - 06/30/05

Council Members (7/1/03 - 06/30/05)

Wes Edmondson, H G & A Associates, PC
Van Elkins, Van Elkins & Assoc., CPAs
Shirley Harris, Bible Harris Smith, PC
Karen Hellmund, Van Elkins & Assoc., CPAs
Jim McPhetridge, James L. McPhetridge, CPA

President's Message

Dear Members,



Bryan Dove

At our January meeting, Ernie Baugh Jr., CPA gave an outstanding accounting and auditing update to the 177 members present. Special thanks go to George Coode and Becker CPA Review for providing the video projector and screen for the dinner meeting, as well as for numerous past mini-seminars. This service has saved the chapter thousands of dollars over the past few years.

Regarding chapter expenditures, in this newsletter you will see the proposed 2004 budget. Also included is the current list of officer nominations. The chapter budget and officers for fiscal year 2004 will be voted on at the March membership meeting. Please review both of these items and let me know of any questions or concerns you may have.

Last month, I promised to follow-up on some tax season volunteer opportunities. Volunteering yields many rewards. It is more than just giving to others. The volunteer often receives as much or more in return. Such rewards include getting to know fellow professionals, gaining new friends and learning new skills key to your professional development. *The Knoxville News Sentinel* has asked that chapter members write tax related articles for a Q&A column beginning the first week of February. Also, the PBS station has asked members to man a tax hotline from 4 - 6 p.m. on Feb. 23. If you want to volunteer for either of these opportunities, please e-mail TSCPA Communications Manager Jennifer Goggin at jgoggin@tscpa.com.

I encourage you to take advantage of at least one of these opportunities. If you have any questions, comments or other matters to be addressed by the board, feel free to contact me at doveb@andersonnews.com or 865-584-9765, ext. 1310.

Thank you,

Bryan Dove

Tom McKay Mini-Seminar Speaker

Tom McKay graduated from the U.S. Naval Academy in 1965 with a degree in engineering. He received his MBA from George Washington University in 1971.

He served as a Marine Corps officer, achieving the rank of captain. He served as executive, manager or sales person for, among others, NCR, AT&T, Corning Glass Works, McQueen & Brown LC and Venture Alliance. He is presently employed as a sales representative for The Business Machines Company of East Tennessee (BMC) in Knoxville. He represents the company in downtown Knoxville. McKay is an experienced, hands-on executive known as a strong, results-oriented manager. The Franklin Covey Company trained him as a facilitator for the "Seven Habits of Highly Effective People," "First Things First" and "Four Roles of Leadership" seminars. He is married to Erlene McKay, an artist and member of The Foothills Craft Guild. They have four sons, three daughters-in-law and three grandchildren.

Anne McKinney, JD Chapter Meeting Speaker

Anne M. McKinney is an attorney who concentrates her practice in matters of taxation, estate planning and probate.

McKinney has served as adjunct associate professor of law in estate planning and wealth transfer tax at the University of Tennessee College of Law, and formerly served as adjunct professor in business law at the University of Tennessee Undergraduate School.

McKinney has 25 years of legal and tax experience and currently has her own law firm, Anne M. McKinney, PC. She previously served as an estate and gift tax attorney with the Internal Revenue Service. McKinney lectures frequently before professional and civic groups on the subjects of estate planning and taxation, personal motivation and success. She co-authored *Estate Planning in Tennessee*.

McKinney graduated from the University of North Carolina School of Law, and received her undergraduate degree from Duke University.

She lives in Knoxville, Tenn. with her husband, Michael, her son, Rand, two Siamese cats and an occasional stray.

Note: Tennessee certifies specialists in Estate Planning. Anne McKinney is not certified as a specialist.



Knoxville Chapter
 Tennessee Society of CPAs
 201 Powell Place
 Brentwood, TN 37027

HAVE YOU MOVED?

If you move or would like to give us your e-mail address to receive the electronic newsletter, be sure to let TSCPA know about it. Send any changes to:

TSCPA
 Phone: 800/762-0272
 E-mail: tscpa@tscpa.com

Register by Internet or Fax

Knoxville Chapter Meeting

Tues., Feb. 4, 2003

TO FAX: Fax this page with mailing label intact to 615/377-3904 by 12:00 noon on Friday, Jan. 31. Make corrections for our files as necessary on the mailing label.

NOTICE OF CANCELLATIONS: If you must cancel, please do so by 5 p.m. the Friday before the meeting, or you will be charged a fee.

I will attend (please check all that apply): Mini-seminar Dinner

Special Diet Requirements: _____

I am bringing guest(s): _____

PRINT name(s) for nametag(s) (if different from label above): _____

Please print your e-mail address: _____

*Make your meeting reservations via the Internet at
https://www.tscpa.com/_forms/chapters/knoxvillereservations.htm.
 For reservations by phone, call TSCPA at 800/762-0272.*

Knoxville Chapter Officers and Directors

Bryan Dove, CPA,
 President
Brian Tankersley, CPA,
 President-Elect
Arthur Carpentier, CPA,
 V.P. - Education
Linda Taylor, CPA,
 V.P. - Membership
Amy Brasfield Marlow, CPA,
 Secretary
Charlotte Cupp, CPA,
 Treasurer
Kevin McCollum, CPA,
 Assistant Treasurer
Ricky Jackson, CPA,
 Newsletter Editor
Nancy Beck, CPA,
 At-Large
Mike Heffner, CPA,
 At-Large

TSCPA Knoxville Chapter Proposed Budget For the Year Ending March 31, 2004

Revenues:		
Membership Dues	\$54,900	
Meeting Revenue - Guests	1,200	
CPE Revenue	10,600	
Golf Tournament Receipts	18,900	
Special Projects	-	
Interest Income	1,200	
Total Revenue	<u>86,800</u>	
Expenses:		
Reservations Director	900	
Door Prizes	550	
Speakers & Other Gifts	1,500	
Meals	51,000	
Newsletter	400	
Printing & Supplies	500	
Convention Expense	1,200	
Scholarships	2,000	
Life Associate Incentives	1,000	
CPE Costs	1,500	
CPE Revenue Sharing - UT	1,766	
CPE Revenue Sharing - CNC	1,767	
CPE Revenue Sharing - ETSU	1,767	
Meetings - Board of Directors	2,000	
Technology Costs	500	
Bank Charges	-	
CPE Committee	100	
Finance Committee	50	
Public Relations Committee	100	
Nominating Committee	50	
Services to Small Businesses	100	
Golf Tournament Expenses	8,350	
Special Projects Committee	10,600	
Taxation Committee	200	
Young CPAs Committee	1,000	
Committee Day	800	
Total Expenses	<u>89,700</u>	
Net Income (Loss) or Over (Under) Budget		<u><u>\$(2,900)</u></u>