



**Summer 2022 Meeting
Wednesday, July 13, 2022
Adobe Connect Online Meeting**

TIME (Central)	AGENDA ITEM	DISCUSSION LEADERS
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AUDIT AND JOINT INTEREST COMBINED SESSION

9:30 a.m.	Welcome and Introductions Antitrust Statement	Matt Pilkington / Patricia Ellington
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9:40 a.m.	MFI-40: 24-Month Adjustment Period for Joint Account Adjustments	Amy Whitley
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This session will consist of presentation and discussion of the MFI-40: 24-Month Adjustment Period for Joint Account Adjustments. Learning Objectives:

By the end of this session you will be able to:

- Recall the project status and any recent changes.
- Discuss the significant changes and issues the project team is working through.
- Ascertain and provide feedback on certain concepts that the drafting team may need direction on.

Program Level: Intermediate

Pre-requisite: Some familiarity with the COPAS documents, their purpose and use, as well as some familiarity with general accounting standards

Advance Preparation: None

Delivery Method: Group Internet

Field of Study: Specialized Knowledge

CPE Credits: 1.0

10:30 a.m.	Knowing Your COPAS Documents (KYCD) Economic Factors - Behind the Numbers	Mike Cougevan
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11:20 a.m.	Economic Factors Question and Answer	TBD
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This session will consist of presentation and discussion of COPAS Economic Factors. Learning Objectives:

By the end of this session you will be able to:

- Recall specific guidelines and interpretations to determine a cost's chargeability.
- Identify a cost as either "directly chargeable" or "covered by overhead."

Program Level: Intermediate

Pre-requisite: Some familiarity with the COPAS documents, their purpose and use, as well as some familiarity with general accounting standards

Advance Preparation: None

Delivery Method: Group Internet

Field of Study: Accounting

CPE Credits: 1.5

11:50 a.m. COPAS Publication Review Initiative

**Matt Pilkington /
Patricia Ellington**

This session will consist of a discussion of the potential concerns or issues with current COPAS publications and potential solutions. Learning Objectives:

- Recall the current COPAS publication priorities and recommendations.
- Provide feedback regarding certain COPAS documents and potential changes.
- Identify solutions or guidance addressed in the publication review steering committee recommendations.

Program Level: Intermediate

Pre-requisite: Some familiarity with the COPAS documents, their purpose and use, as well as some familiarity with general accounting standards

Advance Preparation: None

Delivery Method: Group Internet

Field of Study: Specialized Knowledge

CPE Credits: 1.0

12:40 p.m. Adjourn



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