



**Winter 2021 Meeting**  
**Wednesday, January 20, 2021**  
**Adobe Connect Online Meeting**  
**Combined Joint Interest and Audit Standing Committee**

TIME (CST)	AGENDA ITEM	DISCUSSION LEADERS
9:30 a.m.	<b>Welcome and Introductions</b> Antitrust Statement	<b>Matt Pilkington / Jason Poteet</b> Tanya Harris
9:40 a.m.	<b>COVID: Catastrophe Discussion</b>  This session will consist of presentation of the COVID related issues regarding catastrophe overhead, as defined in various COPAS model form Accounting Procedures.  Learning Objectives:  By the end of this session you will be able to: <ul style="list-style-type: none"> <li>• Describe current COVID related issues and their relation to various COPAS model form Accounting Procedures.</li> <li>• Discuss the application of such issues as they relate to the governing COPAS model form Accounting Procedures.</li> <li>• Ascertain and provide feedback regarding the formation of project team.</li> </ul> <u>Program Level:</u> Intermediate <u>Pre-requisite:</u> Some familiarity with the COPAS documents, their purpose and use, as well as some familiarity with general accounting standards <u>Advance Preparation:</u> None <u>Delivery Method:</u> Group Internet Based <u>Field of Study:</u> Specialized Knowledge <u>CPE Credits:</u> 1.0	<b>Kim Williams</b>
10:40 a.m.	<b>MF 20XX Accounting Procedure Update</b>  This session will consist of presentation of the new COPAS Model Form Accounting Procedure document MF-20XX document.  Learning Objectives:  By the end of this session you will be able to: <ul style="list-style-type: none"> <li>• Describe the project status and any recent changes.</li> <li>• Discuss the significant changes and issues the project team is working through.</li> </ul>	<b>Karla Bower / Project Team</b>

- Ascertain and provide feedback regarding certain concepts that the drafting team may need direction on for the upcoming draft.

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 Based

Field of Study: Specialized Knowledge

CPE Credits: 1.0

**11:30 a.m. Break - Lunch**

**12:30 p.m. MFI-XX Remote Technology Centers Update**

**Deb Retzliff / Project Team**

This session will consist of presentation of the new COPAS Model Form Interpretation of the Remote Technology Centers MFI-XX document.

Learning Objectives:

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

- Describe the basis for the comments received on the October 23, 2020 RTC MFI New Draft.
- Discuss the importance of significant issues surfaced within the comments received.
- Ascertain and provide feedback regarding certain concepts that the drafting team may need direction on for the upcoming Voting Draft.

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 Based

Field of Study: Specialized Knowledge

CPE Credits: 1.0

**1:30 p.m. MFI-40 24 Month Adjustment Period for Joint Account Adjustments Amy Whitley**

This session will consist of presentation of the changes to COPAS Model Form Interpretation 40 - 24 Month Adjustment Period.

Learning Objectives:

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

- Describe the project team's current proposed changes and issues they are working through.
- Discuss the importance of the proposed changes and issues in the existing document.
- Ascertain and provide feedback regarding certain concepts that the project team may need direction on for the upcoming Voting Draft.

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 Based

Field of Study: Specialized Knowledge

CPE Credits: 1.0

**2:30 p.m. Adjourn**

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