

Ohio Chapter, Association for Accounting Administration *February 2015 Meeting Minutes*

The February meeting of the Ohio Chapter, Association for Accounting Administration was held at Ohio Society of CPA's in Dublin, Ohio on February 20, 2015.

The following were in attendance:

Elizabeth Mayer	Schlabig & Associates LTD	Akron
Samantha VanArnhem	Corrigan Krause	Westlake
Leisha Rospert	Payne, Nickles & Company	Norwalk
Sarah Galley	Polman & Talmage & Co	Dayton
Dan Lewis	Lewis Professional	Worthington
Allen Lloyd	Ohio Society of CPAs	Dublin
Mary Wallace	Zinner & Co, LLP	Beachwood
Sharon Trabbic	William Vaughan Co	Maumee
Joseph Pannitto	Insurance Partners Agency	Solon
Beverly Rench	Thorn, Lewis & Duncan	Dayton
Michelle Johnson	Martinet Recchia	Willoughby*

**by phone*

Presentation

This meeting's presentation was "*The Concerned CPA Network*" presented by Lynn Nichols.

Business Meeting

Minutes of the November meeting were approved, as was the Treasurer's report.

Leisha Rospert, Chapter Vice-President, gave a membership update and welcomed Mary Wallace to the membership committee. The Ohio chapter membership committee is working with National office on new membership efforts.

Sharon Trabbic, Immediate Past President & National Board Member, reported that the National Board is considering instituting a firm membership rather than just an

individual membership. This will allow for others within the firm to participate in AAA events and meetings.

Samantha VanArnhem, Program Director, shared the speaker and topic for the May meeting:

May 15, 2015 – Human Resource Update presented by Lori K. Long, Ph.D., SPHR

In addition, Samantha announced that the chapter is open to ideas for speakers and/or topics. Contact Samantha to share your ideas.

Sharon Trabbic gave a report on the upcoming National Conference. The 2015 conference is June 7-10th in Orlando, Florida. This year's conference is in partnership with the AICPA and the Association for Accounting Marketing. There is a separate AAA track for courses, along with the annual ACE Award and Recognition Dinner. The early bird deadline has been extended until March 13, 2015. For those with AAAPM certification you receive an additional \$50 discount.

Sharon reminded chapter members that PCPS is a partner of AAA. PCPS is a firm practice management resource center. It provides a multitude of resources to all firm sizes. Sharon encouraged members to become members.

Sharon requested feedback on sharing with the National Board how the Ohio Chapter's mentoring program works. This program was implemented by Ohio chapter members Kim Tanner and Leigh-Ann Sparks to help support the role of new firm administrators. Sharon believes that this program should be implemented on the national level. Chapter attendees agreed that a national mentoring program would be a great addition to AAA.

Sarah Galley, Chapter President, announced the Ohio Chapter's Annual National Conference Scholarship. This scholarship is awarded to a first time attendee to experience the AAA National Conference. The 2015 AAA National Practice Management Conference will take place June 8-10 in Orlando, Florida. The scholarship covers the registration fee for the conference. If you are interested in applying for the scholarship, send Sarah Galley an email.

Upcoming 2015 Meeting's-Mark your calendar

May 15, 2015
July 17, 2015
September 18, 2015
November 20, 2015

Our meetings are held at the OSCP Dublin offices.

Roundtable Discussion

1. Busy season activities for staff
2. Partner retirement
3. New owners
4. Taking clients paperless
5. Seminar policy for PT employees
6. PTO policy
7. Form 3115
8. Electronic signature of 8879s
9. Engagement letters
10. Management meetings
11. Email retention
12. Administrative team structure
13. Consulting structure
14. Billing or building
15. New CPE guidelines
16. CPA License Renewal
17. Professional attire for men