



Ohio Chapter, CPA Firm Management Association
Meeting Minutes

The July meeting of the Ohio Chapter of the CPA Firm Management Association was held at the new Ohio Society of CPAs offices in Columbus, Ohio on July 15, 2016.

The following were in attendance

Timothy Bub	Newman & Company	Cleveland, Ohio
Elizabeth Mayer	Schlabig & Associates	Akron, Ohio
Sharon Trabbic	William Vaughan Co	Maumee, Ohio
Dan Lewis	Lewis Professional	Worthington, Ohio
Michelle Johnson	Martinet Recchia Inc	Willoughby, Ohio
Tammy Boring	Snyder & Company	Lancaster, Ohio
Sarah Galley	Pohlman & Talmage	Dayton, Ohio
Leisha Rospert	Payne, Nickles & Company	Norwalk, Ohio
Jenn Clark	Payne, Nickles & Company	Norwalk, Ohio
Allen Lloyd	Ohio Society of CPAs	Columbus, Ohio
Denise Ison-Miller	Ohio Society of CPAs	Columbus, Ohio
Kim Beare	Fenner, Melstrom & Dooling, PLC	Birmingham, MI

Presentation

The meeting presentation was "The Power of Excel" with Donald Tomoff of Invenio Advisors, LLC

Business Meeting

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

Leisha Rospert, Vice-President, Membership Committee Chair reported that the Ohio Chapter welcomed three new members.

Sarah Galley, Ohio Chapter president, announced the speaker our September meeting:

September 16, 2016

"What's your Story?" Marty Morda

Sarah reminded us that we no longer meet in November. Our 2017 meetings will be in February, May, July and September. All meetings will be held at the OSCPA's new facility located at 4249 Easton Way, Suite 150, Columbus, OH 43219.

Sharon Trabbic, Immediate Past President and Nominating Committee Chair, presented the slate of officers for the Executive Board for the upcoming year:

President	Leisha Rospert
Vice – President	Elizabeth Mayer
Secretary	Michelle Johnson
Treasurer	Tammy Boring
Immediate Past President	Sarah Galley

The slate of officers was approved.

Sharon noted that the position of Program Chair is still available. This board position's main duties include booking speakers and recommending meeting topics. Anyone with an interest should reach out to Sharon Trabbic or Sarah Galley.

Sharon gave an update from the National Board. The CPAFMA has a new website and Sharon encouraged members to look at it.

Sharon announced that the 2017 National CPAFMA Conference is June 20-23, 2017 in Fort Worth, Texas.

The meeting ended with a tour of the new OSCPA facility.

Round Table Topics

OSCPA Administrator memberships

Recruiting/Head hunters

Saving Money

Compensation and Benefits Study

Website Updates

Professional Staff Development

Grading/Firing Clients

Partner Buy-In

Trail Balance/Engagement

Code 7216

Electronic Signing