



## **Ohio Chapter Meeting**

Friday, September 22, 2017

Ohio Society of Certified Public Accountants  
Columbus, Ohio

### **The following members were in attendance:**

Michelle Holmes	Martinet Recchia	Willoughby, Ohio
Tammy Boring	Snyder & Company	Lancaster, Ohio
Cara Knechtly	Woomer, Nistendirk	Charleston, WV
Sarah Galley	Pohlman & Talmadge	Dayton, Ohio
Denise Ison-Miller	OSCPA	Columbus, Ohio
Becca Lenihan	Rudler, PSC	Fort Wright, KY
Sarah Sanders	Rudler, PSC	Fort Wright, KY
Patti Ianni	HW &Co	Beachwood, Ohio
Rick Lightner	Arnett Carbis Toothman	Charleston, WV
Sheena Hankins	Clarus Partners, LLC	Columbus, Ohio
Guy Gage	Partners Coach	
Tim Bub	Newman & Company	Cleveland, Ohio

### **Presentation**

David Homan “Build a Health Management Strategy That Works”

*If you would like a copy of David’s presentation, please contact Sarah Galley.*

### **Business Meeting**

Sarah Galley, Ohio Chapter Past President, opened the business meeting.

The minutes from the July meeting as posted on the website were approved. If you have any changes, contact Michelle Holmes, Chapter Secretary.

Tammy Boring, Chapter Treasurer reviewed the treasurer’s report and it was approved as submitted.

Sarah Galley, Chapter Program Chair, reviewed the upcoming meeting dates and other tentative program topics for 2018.

Sarah announced the CPAFMA National Conference for 2018:

2018 CPA Firm Management Association's National Practice Management Conference in  
partnership with AICPA ENGAGE  
June 11 - 14, 2018  
Las Vegas, Nevada

**Roundtable discussion of these topics:**

- 1) Health Insurance – what are you paying for employees?
- 2) Who is using GoodRX – prescription discount and app?
- 3) Performance Reviews – is your firm still using them?
- 4) Business Development – does your firm have required hours?
- 5) Partner bonus – any bonus for new business?
- 6) Lucerte Software
- 7) Wealth Management
- 8) Xcentric – Users and Pricing
- 9) Wages – what is the average salary increase?
- 10) Staff training – specifically new staff
- 11) Partner retirement program – age requirement? Transition period?
- 12) Technology – Artificial intelligence
- 13) College recruiting – disconnected accounting skills