



Ohio Chapter, CPA Firm Management Association
Chapter Meeting Minutes

The February meeting of the Ohio Chapter of the CPA Firm Management Association was held at the new Ohio Society of CPAs on Friday, February 17, 2017.

The following were in attendance:

Timothy Bub	Newman & Company	Cleveland, Ohio
Dan Lewis	Lewis Professional	Worthington, Ohio
Michelle Holmes	Martinet Recchia Inc	Willoughby, Ohio
Tammy Boring	Snyder & Company	Lancaster, Ohio
Sarah Galley	Pohlman & Talmage	Dayton, Ohio
Leisha Rospert	Payne, Nickles & Company	Norwalk, Ohio
Allen Lloyd	Ohio Society of CPAs	Columbus, Ohio
Cara Knechtly	Wommer, Nisendirk & Assoc	Charleston, WV
Guy Gage	Partners Coach	Bridgeport, WV
Ryan Phillips	Oles & Associates	Columbus, Ohio
Elizabeth Mayer	Schlabig & Associates	Akron, Ohio
Sharon Trabbic	William Vaughan Co	Maumee, Ohio
Rita Keller	Keller Advisors LLC	Dayton, Ohio
Sheena Hankins	Clarus Partners	Columbus, OH

Presentation

The meeting presentation was “2016 Employment Law Update” Scott Warwick, Scott Warwick’s Consulting, Coaching & Training Services.

Business Meeting

Minutes of the September 2016 meeting were approved, as was the Treasurer’s report.

Leisha Rospert, Ohio Chapter President, gave the membership report.

Sarah Galley, Program Chair, announced the dates for our 2017 meetings:

May 19, 2017	“The Good, The Bad and The Ugly of Tax Season”
July 21, 2017	Joint meeting with the Ohio Society
September 22, 2017	TBD (<i>please note this is a change due to IRS tax deadlines</i>)

All meetings will be held at the OSCPAs new facility located at 4249 Easton Way, Suite 150, Columbus, OH 43219.

Sharon Trabbic, National Director of Chapter Development gave an update from National:

The Associations’ AAAPM designation is now PAFM (Public Accounting Firm Manager). Sharon reminded and encouraged attendees to apply for the designation; which enhances the status of your position within the industry. The re-branding is complete; those who have this designation should make the change.

CPAFMA Leadership Institute has been launched. The institute is limited to 20 people and applications have been submitted. This program is for firm leaders to enhance their skills in firm management. Visit <http://www.cpaafma.org/articles/leadership-institute-launches-class-2017/> for more information.

The 2017 National CPAFMA Conference is June 20-23, 2017 and will be held at The Worthington Renaissance Hotel in Fort Worth, Texas. The featured speakers for this year’s conference include Dr. Rick Grandinetti, Bill Reeb, along with Larry and Meagon Johnson. Sharon shared that the breakouts by firm size and other feedback shared from last year’s conference has been addressed by the board. Visit http://www.cpaafma.org/2017_conference/ for more information and conference registration.

The 2018 Conference will be a collaborative mega-conference with the AICPA and PCPS.

As a reminder, the Ohio Chapter Annual National Conference Scholarship is available. This scholarship is awarded to a first time attendee to experience the CPAFMA National Conference at no cost. The scholarship covers the registration fee for the conference; the scholarship does not cover travel or hotel fees.

If you are interested in applying for the scholarship, email Ohio Chapter President, Leisha Rospert (LeishaR@pnccpa.biz.) a brief summary of why you think attending the conference would be a benefit for you and your firm.

RoundTable Topics

Practice Management

CCH Engagement vs Thomson Engagement

Employee Recognition

Fun Busy Season things

Banking Verifications

Competition

Thomson UltraTaxCS

Partner Retirement

Transition of Managing Partner

Partner Expectations

Employee Time off During Tax Season