



## **Ohio Chapter Meeting**

Friday, July 20, 2018

Ohio Society of Certified Public Accountants

Columbus, Ohio

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

Patti Ianni	HW & Co.	Cleveland, Ohio
Tim Bub	Newman & Company, CPAs	Cleveland, Ohio
Tammy Boring	Snyder & Company	Lancaster, Ohio
Amber McAuliffe	Ohio Society of CPAs	Columbus, Ohio
Leisha Rospert	Payne, Nickles & Company	Norwalk, Ohio
Sarah Galley	Pohlman & Talmage CPAs	Dayton, Ohio
Becca Lenihan	Rudler PSC	Ft. Wright, KY
Sarah Sanders	Rudler PSC	Ft. Wright, KY
Angela Klosterman	Thorn, Lewis & Duncan	Dayton, Ohio
Jennifer Plummer	Whitcomb & Hess, Inc.	Ashland, Ohio
Heather Dolen	McLain, Hill, Rugg & Assoc	Zanesville, Ohio
Wendy Lowe	McLain, Hill Rugg & Assoc	Newark, Ohio

### **Presentation**

Kristen Rampe, CPA “Freedom to Fail”

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

### **Business Meeting**

Leisha Rospert, Ohio Chapter President, opened the business meeting.

The minutes from the May 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.

Tim Bub, Chapter Vice President, introduced two new members to the Ohio Chapter.

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

Sarah Sanders of Rudler, PSC, 2018 Scholarship Recipient, reviewed her experience from the CPAFMA National Conference.

Leisha Rospert, Ohio Chapter President reminded the chapter of the CPAFMA National Conference for 2019 will be in partnership with AICPA.

### **Roundtable discussion of these topics:**

- 1) Permission Policy and Requirements for new clients?
- 2) Client Welcome Letter
- 3) Does anyone charge a Technology Fee to clients?
- 4) Is everything mailed certified? How is everyone mailing documents?
- 5) Has anyone heard anything about increased DOL audits regarding the newly required expanded plan documents?
- 6) How are people returning data to clients?
- 7) Suggestions on helping someone pass CPA? How to handle if star employee, but just can't pass that last section?
- 8) Are people binding financial statements still? What are they using?
- 9) Is anyone using an app for scheduling online such as Calendly?
- 10) Who is using Practice CS and the marketing/business development module?
- 11) Who has a cellphone policy about requiring passwords and connecting to unsecured Wi-Fi connections?
- 12) Is anyone doing group recruiting type events?
- 13) Can we begin posting documents to share on the QAAA Ohio Forum versus emailing?
- 14) Discussion took place regarding the new OBG modernized gateway system.