



**Ohio Chapter Meeting**

Friday, July 19, 2019

Ohio Society of Certified Public Accountants

Columbus, Ohio

**The following members were in attendance:**

Tim Bub	Newman & Company, CPAs	Cleveland, Ohio
Michelle Holmes	Martinet Recchia Inc	Willoughby, Ohio
Lori Ellinger	Kirsch CPA Group, LLC	Oxford, Ohio
Stefanie Marusiak	Bober Markey Fedorovich	Akron, Ohio
Sarah Sanders	Rudler, PSC	Ft Wright, KY
Angela Klosterman	Thorn, Lewis & Duncan	Dayton, Ohio
Jennifer Plummer	Whitcomb & Hess	Ashland, Ohio
Sheena Hankins	Clarus Partners	Columbus, Ohio
Patti Ianni	HW & Co.	Cleveland, Ohio
Becca Lenihan	Rudler, PSC	Ft Wright, KY

**Presentation**

***“Do and Don’ts of Critical Human Resource Functions”***

**Presented by:**

Jeffrey J. Patter, Managing Partner, Carlille Patchen & Murphy, LLP

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

## **Business Meeting**

Tim Bub, Ohio Chapter Vice-President opened the business meeting.

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

Tim Bub reviewed the treasurer's report and it was approved as submitted.

Tim Bub, Chapter Vice-President, shared the Chapter's membership report.

Tim reminded chapter members The 2020 CPA Firm Management Association Conference will be in Sarasota, Florida – June 23-June 26, 2020

Tim reviewed the upcoming meeting dates and topics for the next meeting:

September 20, 2019  
Jim Fahey, Chief Learning Officer  
HBK CPA's & Consultants  
"Training Trends in CPA Firms"

Tim announced that the Ohio Chapter board nominations will take place at our September 20, 2019 meeting. If you have an interest in serving on the board for any of the positions listed below please email Sarah Galley at [sarahg@PTBC-CPAS.com](mailto:sarahg@PTBC-CPAS.com).

## **CPAFMA Ohio Chapter Roundtable**

- Professional Liability Insurance
- Does staff accountants work on all partners' clients
- Meals in house
- Internal communication venues
- XCM workflow
- Salary Survey
- Scheduling tools
- Ohio Business Gateway
- Dress for your day
- PAFM Certification