



**Ohio Chapter Meeting**

September, 20, 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
Angela Klosterman	Thorn, Lewis & Duncan	Dayton, Ohio
Jennifer Plummer	Whitcomb & Hess	Ashland, Ohio
Nicole Johnson	Clarus Partners	Columbus, Ohio
Patti Ianni	HW & Co.	Cleveland, Ohio
Becca Lenihan	Rudler, PSC	Ft Wright, KY
Alex Weidner	Rudler, PSC	Ft Wright, KY
Rick Lightner	Arnett Carbis Toothman	Charleston, WV
Stefanie Marusiak	Bober Markey Fedorovich	Akron, Ohio
Molly Stinn	Corrigan Krause	Westlake, Ohio
Susan Moon	Hall, Kistler & Company	Canton, Ohio
Rita Keller	Keller Advisors, LLC	Beavercreek, Ohio
Josh Goldman	Ohio Society of CPAs	Columbus, Ohio
Denise Ison-Miller	Ohio Society of CPAs	Columbus, Ohio
Tiffany Crosby	Ohio Society of CPAs	Columbus, Ohio
Mary Steele	Oles & Associates	Columbus, Ohio
Leisha Rospert	Payne, Nickles & Company	Columbus, Ohio
Sarah Galley	Pohlman, Talmage, Brown & Ca...	Dayton, Ohio
Tammy Boring	Snyder & Company	Lancaster, Ohio
Jennifer Zarins	Tidwell Group	Columbus, Ohio
Sharron Trabbic	William Vaughan Co	Maumee, Ohio
Julia Johnson	WSW CPAs LLC	Nashville, TN

**Presentation**

***“Training Trends in CPA Firms”***

**Presented by:**

Jim Fahey, PAFM, Chief Learning Officer  
HPK CPA’s & Consultants

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

**Business Meeting**

Leisha Rospert, Ohio Chapter President opened the business meeting.

The minutes from the July meeting as posted 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, reported there are no new members to the chapter.

Sarah Galley, Program Chair, shared the dates for the 2020 Ohio Chapter meetings:

February 21	May 15	July 17	September 18
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Sharon Trabbic, Board Chair, CPA Firm Managers Association, presented on behalf of the CPAFMA National office:

1. Sharon announced that the 2020 CPA Firm Management Association Conference will be in Sarasota, Florida – June 23-June 26, 2020. Sharon shared that the 2020 National Conference will just be for CPAFMA attendees, the 2021 national conference will be part of the AICPA’s conference.
2. CPAFMA has a newly updated website. The association launched a new member platform, CONNECT. All members have been automatically subscribed and it has a Daily Digest version for all members. Sharon urged members to visit your profile, post questions, read discussions...this is a evolving collaborative tool for all members.
3. Sharon suggested that chapter members join AICPA’s PCPS program, it is another venue to share content and it has become a great resource to many members.
4. Sharon shared that CPFMA is instituting a benevolent fund. This 501c3 fund would be for struggling CPA’s. Stay tuned for more information to come at a later date.

Sarah Galley, Chapter Past President, presented the slate of officers for election to serve the 2019-2020 year:

President	Tim Bub	Newman and Company
Vice President	Michelle Holmes	Martinet Recchia Inc
Secretary	Patti Ianni	HW & Company
Treasurer	Tammy Boring	Snyder & Company
Program Chair	Sarah Galley	Pohlman, Talmge, Brown & Cam..

Rick Lightner moved that the slate be elected and Sharon Trabbic seconded, the motion was passed unanimously.

### CPAFMA Ohio Chapter Roundtable

- Intranet
- Training platform
- 8879 electronic signatures
- VOIP phone systems
- Client portal
- CCH Prosystem FX vs Access
- Maternity/Paternity policy
- Performance Management system
- Tax caddy
- Save Send Returns
- Record retention policy
- Client onboarding process
- Ohio Gateway
- Staff recruiting platforms
- Health/Wellness Programs