



## **Ohio Chapter Meeting**

February 21, 2020

Ohio Society of Certified Public Accountants  
Columbus, Ohio

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

Michelle Holmes	Martinet Recchia Inc	Willoughby, Ohio
Angela Klosterman	Thorn, Lewis & Duncan	Dayton, Ohio
Jennifer Plummer	Whitcomb & Hess, Inc	Ashland, Ohio
Patti Ianni	HW&Co.	Cleveland, Ohio
Becca Lenihan	Rudler, PSC	Ft Wright, KY
Sarah Sanders	Rudler, PSC	Ft Wright, KY
Leisha Rospert	Payne, Nickles & Company	Norwalk, Ohio
Sarah Galley	Pohlman, Talmage, Brown & Ca...	Dayton, Ohio
Tammy Boring	Snyder & Company	Lancaster, Ohio
Ashleigh Miller	Amplify Excellence, LLC	Silver Lake, Ohio
Robin Ott	Ciuni & Panichi, Inc	Beachwood, Ohio
Fred Dillon	Dixon Hughes Goodman LLC	Charleston, WV
J.D. Hurley	McClintock & Associates	Bridgeville, PA
Jennifer Zarins	Tidwell Group	Columbus, Ohio
Linda Nay	Whalen & Company CPAs	Columbus, Ohio
Cara Knechtly	Woomer Nistendirck & Associates	Charleston, WV

### **Presentation**

***“Creating an Engaging Environment”***

### **Presented by:**

Guy Gage, MA, LPC  
Partners Coach  
guy@partnerscoach.com

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

## **Business Meeting**

Leisha Rospert, Ohio Chapter President opened the business meeting.

The minutes from the September meeting as posted were approved. If you have any changes, contact Patti Ianni, Chapter Secretary.

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

Michelle Holmes, Chapter Vice-President, reported there was one new member to the chapter. J.D. Hurley of McClintock & Associates, Bridgeville, PA. Welcome!

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

May 15

July 17

September 18

Sharon Trabbic, Board Chair, CPA Firm Managers Association, emailed an update to Sarah Galley who presented on behalf of the CPAFMA National office:

1. The 2020 CPA Firm Management Association Conference will be in Sarasota, Florida – June 23-June 26, 2020. She shared that the 2020 National Conference will just be for CPAFMA attendees, the 2021 national conference will be part of the AICPA's conference. The CPAFMA National Conference will be back alone in 2022 in Portland, Maine.
2. The Ohio chapter has a conference scholarship. This scholarship is available to firms who have not had a scholarship recipient in the past. 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@pncpa.biz](mailto:LeishaR@pncpa.biz)) a brief summary of why you think attending the conference would be a benefit for you and your firm. All scholarship requests must be received by April 1, 2020.
3. 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. We urge members to visit your profile, post questions, read discussions...this is an evolving collaborative tool for all members.
4. It is 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.

Sarah Galley, Past President, presented the Ohio Chapter Board to serve the 2019-2020 year. The Board changed due to Tim Bub submitting his resignation as he is leaving the accounting profession:

President	Leisha Rospert	Payne, Nickles & Company
Vice President	Michelle Holmes	Martinet Recchia Inc
Secretary	Patti Ianni	HW&Co.
Treasurer	Tammy Boring	Snyder & Company
Program Chair	Sarah Galley	Pohlman, Talmage, Brown & Cam..

Please note we did not have a book drawing this month as indicated on the agenda, the books are still in Tim Bub's possession. We will resume book drawings at next meeting.

### CPAFMA Ohio Chapter Roundtable

- Electronic Signatures/Scanning Returns
- Salary Ranges- Mercer Survey
- Management Meetings/Retreats
- IRS Security Policy Checklist
- Non-solicitation Agreements
- Remote Work Policies
- Who Prepares F/S for Firm
- Performance Management System
- Remote Client Meeting