

## **Ohio Chapter, Association for Accounting Administration May 15, 2009 Meeting**

The May 2009 meeting of the Ohio Chapter, Association for Accounting Administration was held at Franklin University in Dublin, Ohio on May 15, 2009.

The following members were in attendance:

Kelly Bates	Schlabig & Associates, Ltd.	Akron, OH
Tammy Boring	Snyder & Company	Lancaster, OH
Tammy Claus	Gilmore, Jasion & Mahler, Ltd.	Maumee, OH
Gary Ellinger	Brady, Ware & Schoenfeld, Inc.	Dayton, OH
Jim Fahey	Hill, Barth & King LLC	
Paul Fellingner	Shriver & Co.	Cincinnati, OH
Sarah Galley	Pohlman & Talmage CPAs, Inc.	Dayton, OH
David Hill	Arnett & Foster, PLLC	Charleston, WV
Michelle Johnson	Martinet Recchia, Inc.	Willoughby, OH
Kim Miller	Hall, Kistler & Company, LLP	Canton, OH
Patti Miller	Balestra, Harr & Scherer, CPAs, Inc.	Circleville, OH
Susan Moon	Hall, Kistler & Company, LLP	Canton, OH
Jim Page	Gilmore, Jasion & Mahler, Ltd.	Maumee, OH
Kyle Plummer	Norman, Jones, Enlow & Co.	Columbus, OH
Bev Rench	Thorn, Lewis & Duncan, Inc.	Dayton, OH
Jeff Shumway	Battelle & Battelle, LLP	Dayton, OH
Leigh-Ann Sparks	Brady Ware	Dayton, OH
John Tokar	Zinner & Co. LLP	Cleveland, OH
Sharon Trabbic	William Vaughan Company	Maumee, OH
Barb Walker	Barnes Dennig	Cincinnati, OH
Regina Wilson	Payne Nickles & Company	Norwalk, OH

### **Presentation**

This meeting's presentation was "Networking Fundamentals and Asking Clients for Referrals" presented by Chris Perrino, Principal, Business Development at Barnes Dennig.

## **Business Meeting**

Business cards were collected for an attendance award to be given out in July.

Minutes of the previous meeting were approved; the Treasurer's report was presented and accepted.

Nominations were presented for officers for next year:

- President – Kim Tanner
- Vice President – Paul Fellingner
- Secretary – Barb Walker
- Treasurer – Tammy Boring
- Program Chair – Kelly Bates

A vote on this slate of officers will be taken at the July meeting.

The chapter scholarship to the National Conference will go to Kelly Bates this year. Kelly will give her feedback on the conference at the July meeting.

All future chapter meetings will be held at Franklin University.

Jim Fahey reported that a Technology Fly-In was held in Chicago, as an event separate from the National Conference, as it was done last year. There were 35 participants and the event was very successful. There will be a local technology summit here in Ohio in September.

## **Next Meeting**

The next meeting will be held on Friday, July 17, 2009 at the offices of Battelle & Battelle in Dayton.

## **Topics From Roundtable Discussion**

1. Disaster Recover Plans
2. Workflow/Due Date Tracking
3. Client Acceptance Procedures
4. Client Retention Ideas
5. Virtual Machines, i.e. Dumb Terminals
6. Best Practices in Audit and IT Efficiencies
7. FaceBook, LinkedIn and Twitter
8. Scanning in a Paperless Environment (Sure Prep)
9. Camico Downgrade Impact
10. CPA Client Privilege
11. CPA Exam Bonus and Educational Assistance
12. Administrative Staff Evaluations
13. Digital Workflow
14. 7216
15. Binding Solutions
16. Red Flagging
17. Methods of Delivering Client Returns
18. Electronic Billing
19. Flex Schedules
20. Practice Development
21. Scheduling Software
22. Timing of Work