

Ohio Chapter, Association for Accounting Administration November 18, 2005 Meeting

The November 2005 meeting of the Ohio Chapter, Association for Accounting Administration was held at the OSCPAs office in Dublin, Ohio on November 18, 2005.

The following members were in attendance:

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| Craig Baldauf | Schlabig & Associates, Ltd. | Akron, OH |
| Jim Fahey | Brott, Mardis & Co., CPAs | Akron, OH |
| Paul Fellinger | Shriver & Co. | Cincinnati, OH |
| David Hill | Arnett & Foster, PLLC | Charleston, WV |
| Patty Hoover | Packer, Thomas & Company | Youngstown, OH |
| Rita Keller | Brady, Ware & Schoenfeld | Dayton, OH |
| Bev Rench | Thorn, Lewis & Duncan, Inc. | Dayton, OH |
| Jen Ross | The Ohio Society of CPAs | Dublin, OH |
| Kim Tanner | Whitcomb & Hess, Inc. | Ashland, OH |
| Maryan Telling | Crowe Chizek and Company LLC | Cleveland, OH |
| Mary Kay Wagner | Cohen & Company | Cleveland, OH |
| Barb Walker | Barnes, Dennig & Co., Ltd. | Cincinnati, OH |

Presentation

This meeting's presentation was "Be the Light – The Importance of Mentoring" presented by Rita Keller of Brady, Ware & Schoenfeld.

Business Meeting

Minutes of the previous meeting were approved, as was the Treasurer's report.

Cash in bank at September 16, 2005 was \$2,685.31. Income for the past two months was \$451.99 and expenses for the same period were \$549.68. Cash in bank at November 18, 2005 was \$2,587.62.

Old Business

David reviewed the dates for future meetings.

- February 17, 2006 – OSCP A – Roman Kepczyk
- May 19, 2006 – OSCP A – Chris Perrino
- July 21, 2006 – OSCP A – Kurt Southam – Crucial Confrontations
- September 15, 2006 – OSCP A – Chase Bank – Identity Theft
- November 16, 2006 – OSCP A – John Watten – Disaster Recovery
- February 16, 2007 – OSCP A – ERC
- May 18, 2007 – location TBA – Need speaker/topic
- July 20, 2007 – OSCP A – Schottenstein, Zox and Dunn

The National Conference will be held in Indianapolis in 2006. The chapter will again sponsor a scholarship for one of our members to attend.

Nigel Jacobs is heading up the national newsletter, and Jim will be helping him with that. Anyone who has suggestions or ideas can contact Jim.

New Business

Kim is working with the National organization on membership. We want to get more information out to those members who do not attend meetings. Kim will talk with David and some other members on how best to do this.

Jim will once again be putting together a Network Administrators Summit. He plans to do one right after tax season and another one in November.

Jen reviewed the services and products available through the Ohio Society. Jen plans to have information for us at the next meeting on some new web features at the Society. Jen asked everyone for input on what would promote participation in the various Accounting Shows around the state. Kim will work with Jen to get some materials that Jen can use in promoting AAA when she attends these shows.

Mary Kay will send a survey to current members who are not regularly attending meetings to get some insight into why they do not attend. If you have any items you would like to add to this survey, send them to Mary Kay.

CPE credit is available for our regular chapter meetings. Please sign the CPE sheet if you need this credit.

Next Meeting

The next meeting will be held on Friday, February 17, 2006 at the OSCP A office in Columbus.

Topics From Roundtable Discussion

- Jim - bank confirmation form
- Jim - asking staff for input on their own bonus amounts
- Jim - % chargeable for managing partner

- Craig - binding financial statements
- Craig - performance review software
- Craig - practice management software
- Craig - % of raises given

- Patty - personality profiles
- Patty - annual employee meetings

- Bev - pre-tax parking
- Bev - disability premiums after tax

- Kim - opening a branch office from scratch
- Kim - flex schedules
- Kim - HSA's

- David - bonus base criteria