

Ohio Chapter, Association for Accounting Administration September 19, 2013 Meeting

The September 2013 meeting of the Ohio Chapter, Association for Accounting Administration was held at Ohio Society of CPA's in Dublin, Ohio on September 19, 2013.

The following were in attendance:

Bill Grimm	Act Systems	Sylvania
Patti Miller	Balestra, Harr & Scherer	Circleville
Tom Fadeley	Ciuni & Panichi, Inc.	Beachwood
Patricia Bachtel	Donovan, Klimczak & Company	Fairlawn
Paul Abke	GHD CPAs and Advisors	St. Clair Shores, MI
James Fahey	Hill, Barth & King LLC	Boardman
Patti Ianni	Howard, Wershale & Co.	Cleveland
Rob Nance	iShade	Westerville
Lori Ellinger	Kirsch CPA Group, LLC	Oxford
James Johnson	Lewis & Knopf CPAs, P.C.	Flint, MI
Dan Lewis	Lewis Professional Liability Insurance	Worthington
Mark Romito	Maher Duessel	Pittsburgh, PA
Michelle Johnson	Martinet Recchia Inc.	Willoughby
Leisha Rospert	Payne, Nickles & Company	Norwalk
Sarah Galley	Pohlman & Talmage CPAs, Inc.	Dayton
Kelly Nizzer Bates	Schlabig & Associates LTD	Akron
Tammy Boring	Snyder & Company	Lancaster
Margaret Gothot	Tax & Wealth Management, Inc.	Westlake
Lisa Dyson	Thomas R. Daye & Associates CPAs	Worthington
Tom Daye	Thomas R. Daye & Associates CPAs	Worthington
Beverly Rench	Thorn, Lewis & Duncan	Dayton
Marla Martin	Weber O'Brien, Ltd	Sylvania
Debbie Szajna	Weber O'Brien, Ltd	Sylvania
Stephanie Weisenberger	Weber O'Brien, Ltd	Sylvania
Chris Bevington	Whitcomb & Hess, Inc.	Ashland
Sharon Trabbic	William Vaughan Co.	Maumee
Kyle Plummer	Norman Jones Enlow & Co.	Columbus
Allen Lloyd	The Ohio Society of CPAs	Dublin
Jeremy Cole, CPA	H.J. Umbaugh & Associates	Indianapolis, IN
Rob Parsons	H.J. Umbaugh & Associates	Indianapolis, IN
Janie Mikesell	Peachin Schwartz & Weingardt PC	Indianapolis, IN
Allie Petty-Stone	Alerding CPA Group	Indianapolis, IN
Peggy Burnstein	K.B. Parrish	Indianapolis, IN
Tony Willis	K.B. Parrish	Indianapolis, IN
Ginger Strup	Girardot, Strauch & Co.	Lafayette, IN
Bob Daugherty	Deming Malone Livesay & Ostroff,	Louisville, KY
Kellie Campbell	Deming Malone Livesay & Ostroff,	Louisville, KY

Presentation

This meeting's presentation was "*The Digital CPA Ecosystem*" presented by Roman Kepczek of Xcentric.

Business Meeting

Minutes of the July 2013 meeting were approved, as was the Treasurer's report.

Sarah Galley, Chapter Vice-President, gave a membership update.

Marla Martin, Program Chair, shared that she is contacting speakers for the 2014 meetings. Our last meeting of 2013 is:

- Thursday, November 21, 2013 – "Succession Planning and Partner Retirement" Gary Adamson of Adamson Advisory

Kelly Nizzer-Bates, Chapter President, reminded attendees of the Accredited Administrator in Accounting Practice Management (AAAPM) Program.

Kelly reminded attendees that the 2014 meetings will be held on Friday's instead of Thursday. The meetings are held in February, May, July, September and November.

Sharon Trabbic announced that the 2014 AAA National Conference will be held in San Diego, California. Sharon gave an overview of the conference schedule stating that the 2014 conference will be Tuesday, June 17th – Thursday, June 19th, 2014.

Next Meeting

The next meeting will be held on Thursday, November 21, 2013 at the OSCP Dublin offices.

Roundtable Topics

- 1 Disaster Recovery
- 2 E vault
- 3 Standing desks
- 4 Extensions
- 5 Audit Watch
- 6 Boss' Day
- 7 Direct dial phones
- 8 Healthcare Reform
- 9 OSCP Classes
- 10 New Hire Orientation Plan
- 11 Mentoring program
- 12 Client naming system
- 13 G/L packages
- 14 Topic/Speaker ideas
- 15 Admin staff
- 16 Job descriptions
- 17 Server 2008 vs. 2012
- 18 HIPPA/Gove. Sec. Compliance
19. Scheduling
20. Tax Legislations
21. Identity Theft
22. Cyber Liability
23. Tax return delivery
24. P/R services
25. Receptionist
26. CRM
27. Bonus program
28. User conferences'
29. Copiers
30. Checkpoint Learning
31. Allstate vs. Aflac
32. Hosted server