

## Ohio Chapter, Association for Accounting Administration February 21, 2013 Meeting

The February 2013 meeting of the Ohio Chapter, Association for Accounting Administration was held at Ohio Society of CPA's in Dublin, Ohio on February 21, 2013.

The following members were in attendance:

Kelly Nizzer- Bates	Schlabig & Associates, Ltd.	Akron, OH
Stacy Boggess	Arnett & Foster	Charleston, WV
Tammy Boring	Snyder & Company	Lancaster, OH
Fred Dillon	Dixon Hughes PLLC	Charleston, WV
Lisa Dunn	BCG Company	Akron, OH
Lori Ellinger	Kirsch CPA Group LLC	Oxford, OH
Sarah Galley	Polman & Talmage CPAs, Inc.	Dayton, OH
Sheena Hankins	Clarus Partners	Columbus, OH
Patti Ianni	Howard Wershbaile & Co.	Cleveland, OH
Cara Knechtly	Wommer Nistendirk & Assoc	Charleston, WV
Marlin Martin	Weber O'Briand Ltd.	Worthington, OH
Susan Moon	Hall, Kistler & Company, LLP	Canton, OH
Kyle Plummer	Norman Jones Enlow	Columbus, OH
Anna Sary	Zinner & Co., LLP	Cleveland, OH
Ashley Schmitz	Brixey & Meyer, Inc.	Miamisburg, OH
Leigh-Ann Sparks	Battelle & Battelle	Dayton, OH
Kim Tanner	Whitcomb & Hess, Inc.	Ashland, OH
Sharon Trabbic	William Vaughan Company	Maumee, OH
Barb Walker	Barnes Dennig & Company	Cincinnati, OH

### Presentation

This meeting's presentation was "*The Power and Practical Uses of Thought Leadership*" presented by Rob Nance, Director of Content & Community, iShade.

### Business Meeting

Minutes of the November 2012 meeting were approved, as was the Treasurer's report.

Sarah Galley, Program Chair, shared the upcoming meeting speakers/topics:

- Thursday, May 16, 2013 – "Value Pricing" Ron Baker, VeraSage Institute
- Thursday, July 18, 2013 – "Lean CPA" Dustin Hostetler, Flowtivity. *This will also be our Annual Meeting and Election of Officers*
- Thursday, September 19, 2013 – To Be Determined
- Thursday, November 21, 2013 – "Succession Planning" Gary Adamson, Adamson Advisory

Kim Tanner, Former Chapter President, announced the nominations for Officers:

- President – Kelly Nizzer-Bates
- Vice President – Sarah Galley
- Treasurer – Tammy Boring

- Secretary – Michelle Johnson
- Program Chair – Marla Martin

The election of the officers and the annual meeting will be at our July 18, 2013 meeting.

Sharon Trabbic, Chapter President, gave a brief overview of the Accredited Administrator in Accounting Practice Management (AAAPM) Program. Sharon encouraged those that have not applied to do so. It was also mentioned that in the near future there will be a test requirement for this certification and that there is currently a CPE requirement with the certification.

Sharon also reminded administrators to subscribe to the Q & AAA Forum on the National website. There are now 520 users; this is a great venue to have discussions and ask questions.

The National Practice Management Conference is June 18-21, 2013 in Detroit, Michigan. There will be a Financial & Technology Fly-In on Monday and Tuesday (6/17-6/18) and the Human Resource Fly-In will be on Tuesday (6/18). Please mark your calendars and plan to attend. National would like to make this the largest AAA event in National history. Registration is open and all Ohio administrators are encouraged to attend.

Sharon discussed the scholarship offered from the Ohio Chapter to attend the National Practice Management Conference. You must be a first time attendee to qualify. To apply, send Sharon a letter explaining why you want to attend and how you feel it would be beneficial to you and your firm. After the applications are reviewed, the board will make a selection. The scholarship covers the registration fee for the conference; it does not cover travel or lodging.

Jim Fahey asked Sharon to share with our members that National will be nominating members for the National Board of Directors in the next few months. If interested please contact Jim Fahey.

### **Next Meeting**

The next meeting will be held on Thursday, May 16, 2013 at the OSCP Dublin offices.

### **Roundtable Topics**

- QB Storage
- Document Storage
- Accounting CS
- Telephone systems
- Meals – Tax Season
- Fun Stuff
- Internal Accounting / Payroll

- Workflow
- Cloud Solutions
- Professional Development Plans
- Electronic Signatures
- One Note
- Hootsuite
- Linked IN
- CCH/CS mixed vendors
- CRM
- Bizactions
- Electronic Returns
- Tax Processing
- Evaluation Forms
- Promotion Sign Off
- Personnel guide amendments
- BYOD
- Post Merger
- Multiple locations
- Recruiting
- Cyber Liability