



Ohio Chapter Meeting
September 18, 2020
Virtual Meeting

The following members attended via ZOOM:

Michelle Holmes	Martinet Recchia Inc	Willoughby, Ohio
Stefanie Marusiak	Bober Markey Fedorovich	Akron, Ohio
Patti Ianni	HW&Co.	Cleveland, Ohio
Leisha Rospert	Payne, Nickles & Company	Norwalk, Ohio
Sarah Galley	Pohlman, Talmage, Brown & Ca...	Dayton, Ohio
Tammy Boring	Snyder & Company	Lancaster, Ohio
Rita Keller	Keller Advisors, LLC	Beavercreek
Brad Barbour	AICPA	Durham, NC
Chelsea Olsen	Winningham Becker & Co	Woodland, CA
Carly Chohon	WBAC	Woodland, CA
Jessica Bouchard	Baker Newman Noyes	Manchester, NH
John Ward	Forward CPA	San Rafael, CA
Joseph Richer	Dimarco	Syracuse, NY
Michelle Sullivan	Baker Newman Noyes	Portland, ME

Business Meeting

Leisha Rospert, Ohio Chapter President opened the business meeting.

The minutes from the July 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 were no new members to the chapter.

Sarah Galley, Program Chair, shared the dates for the 2021 Ohio Chapter meetings:

February 19, 2021

May 21, 2021

July 16, 2021

Leisha Rospert checked with National CPAFMA website and they have listed a virtual schedule for National 2020 Conference which is listed as November 9-11.

Speaker: Niki Doctor Bregante Company CPA's

Journey from Manager to Partner

- Recognize that there is more to focus on than technical skills.
Identify characteristics of emerging leaders.
Share experiences of a career path from manager to partner in a CPA firm
- Need to act like you own the firm even before you are partner. Show interest and capacity.
- Join committees- get involved. Contribute-give suggestions on how firm can be improved upon. Offer to do presentations. This is where you have an opening-step up get more involved, show you want to be a leader.
- Partners will recognize the quality-you can lead and succeed with projects.
Communicate your goals-time frame for when you want to be partner by. Not a given, being a partner is similar to an extended family and it is not a given that you will be made partner. Very important when partners are chosen, that personality fits as well. Culture/personality fit very important.
- Meet with client/meet with other organizations- attorneys etc. find out how they work, tell about firm. Buy book of business from partner.
- BD- not a requirement-show quality-

Recommendation for smooth transitions.

- Training for partner track thru Boomer consulting

Roundtable

How to gently transition older employees to retire? No ideas. Other firms having similar problem.

Phone systems being used? Go to cloud get rid of physical lines. Route to cell phones.

CRM system? Moving to Karbon –cloud based contact management cloud based tool. Intergrates with quickbooks. Can be utilized as CRM, fit. Other firm uses Able. Updates all monthly communications with clients.

Remote- many smaller firms are fully back, mid-sized firms are not back fully. Those who felt uncomfortable can still work remotely. Some stigma attached to those who chose to work remote.

Most firms working 1-2 days a week in office. Have schedule for people going back to office.

Interns- recruiting virtual.

Did anyone have CCH outage on the 15th? Couldn't efile until 11:55pm. Down from mid-morning until 11:50pm.

Who uses safe send- how did they like? Consensus was worked well- however city filing issue is a problem.

How is CPE for firms being handled? In house

THNKS- free account for meals-send cellphone or email link for breakfast/lunch. Get confirmation of redeeming.

Appreciation- important to show appreciation to staff