

# Ohio Chapter, Association for Accounting Administration

## September 7, 2001 Meeting

The September 2001 meeting of the Ohio Chapter, Association for Accounting Administration was held at the OSCPA office in Dublin, Ohio.

The following members were in attendance:

Craig Baldauf	Schlabig & Associates	Akron, OH
Tammy Boring	Snyder, Freeland & Co.	Lancaster, OH
David Gruwell	William Vaughan Company	Maumee, OH
Candi Haas	Payne, Hammersmith, Nickles & Co.	Norwalk, OH
David Hill	Arnett & Foster	Charleston, WV
Mary Mungin	Shoemaker Gaffney & Company	Cincinnati, OH
Curt Pederson	Brady, Ware & Shoenfeld, Inc.	Dayton, OH
Beverly Rench	Thorn Lewis & Duncan	Dayton, OH
Sally Siferd	Pry CPA Services, Inc.	Findlay, OH
Joanne Strebler	Barnhouse & Cornett CPAs	Hamilton, OH

### **Presentation**

Jerry B. Nelson, Senior Vice President of Brunswick Companies presented *Accountant's Professional Liability, Trends, Issues, and Current Developments*. Jerry has worked in the professional liability industry for more than 15 years. He was able to offer the group who were present, an experienced look at the insurance history, those areas which claims are most often seen (tax 57%, consulting 15%, audit 11%, reviews 3%) and offer advice as to how to stay clear of claims. For instance, half of all public audit claims are generated by financial service clients so if you're going to work with the banks, know your business well. In working with financial planning clients, be sure to document all client discussions, obtain signed engagement letters before providing services and be sure to disclose referral fees as required by the state and never accept equity or debt interest in lieu of fees.

### **Business Meeting**

Motion was made to accept the minutes from the July 2001 meeting by David Hill, seconded by Joanne Strebler and passed by those present.

Tammy Boring, treasurer, gave the treasurer's report which showed cash on hand of \$2,916.74. Mary Mungin made the motion to accept the report, David Gruwell seconded it and it was passed by those present.

### **New Business**

President, Candi Haas, announced the November meeting will be held on the 15<sup>th</sup> at the OSCPA office and that we will be honored to have Roman Kepczyk of InfoTech Partners North America, Inc. as our guest speaker. Roman is a nationally recognized expert in the field of technology. He is a CPA as well which means he understands our business and the accounting applications. He was previously affiliated with Boomer Consulting. Roman's agenda will include internet

usage and the research available, gadgets - what's in and what's not and software applications. The presentation will qualify for four (4) CPE credits.

David Hill, Program Chairman, added that the fee for the November meeting will be increased to \$50 per person to help defray the costs. Roman is giving us a discount from his normal fees as we are an AAA chapter. If any firm would like to hire Roman to come to their office for a technology review on Friday, November 16, he would have this day available and the firm would be able to split Roman's traveling fees with AAA; a savings of a couple of hundred dollars over that firm having to have Roman return at a later time. Interested firms should contact Roman directly at 480-706-1728.

Ohio Chapter members need to have reservations and payment to Tammy Boring, Snyder, Freeland & Co., P. O. Box 2570, Lancaster, OH 43130 by October 15. After that date, we will be opening the meeting up to surrounding states' chapters. Their reservations and payment will need to be to Tammy by November 1. Your guests are welcome at this very exciting event. Hope to see everyone on November 15!

### **Other Business**

Candi announced future meeting dates are February 15 and May 17. Dave Hill is looking at speakers regarding "stress-causing foods" and purchasing supplies on line for these meetings. 2002 is the chapter's 10<sup>th</sup> anniversary and a party in July is being planned to commemorate this milestone.

Candi will be sending a special "thank you" to Linda Nay and her firm for allowing us to use Little Turtle Country Club last July.

Tammy motioned for the meeting to be adjourned, with Joanne seconding that motion and it carried unanimously.

### **Networking**

Information was shared regarding:

- ◆ Microsoft Licensing
- ◆ Time and Billing Software
- ◆ Nonbillable code descriptions
- ◆ RAS/RAN
- ◆ Collections
- ◆ Staff levels

"Coming to these meetings is like being able to talk with grownups after talking with children all week." *David Gruwell, William Vaughan Company*

