Richmond
A Chapter of the Association of Legal Administrators

August 2019 Member Meeting
Minutes

Cooper's Hawk Restaurant
Wednesday, August 21, 2019
Noon-1:30 pm

Thanks and Recognition:

Welcome everyone. Thanks to Cooper's Hawk Restaurant for hosting our luncheon and Christina Bloom and Anne Henkel for coordinating the meeting plans for us.

Thank our meeting sponsors:

- Stone's Office Equipment
- ALPs
- Planet Depo

Introduce and Thank Business Partners:

1.	DeAnn Pangburn	Atlantic Union Bank	Platinum Business Partner
2.	Liz Coleman	Prime Legal	Gold Business Partner
3.	Sam Stone	Stone's Office Equipment	Silver Business Partner
4.	Lucus Killmeier	Stone's Office Equipment	Silver Business Partner
5.	Dave Johnson	The Supply Room	Silver Business Partner
6.	Shawnda White	ALPS	Bronze Business Partner
7.	Michael Flaherty	ALPS	Bronze Business Partner
8.	Donna Baird	Lexis Nexis	Bronze Business Partner
9.	Tina Branham	All-State Legal	Bronze Business Partner

Are there any other business partners?

Guests:

- Jennifer Morris – Kaplan Voelker Cunningham & Frank PLC

Announcements:

- **2020 Planning Meeting and Survey** – Update
- **August 6** – Volunteer Event at Feed More – Thanks to our participants Kay Larkin, Judith Lancaster, Kathy Scourby, Nancy Pugh, Cherie Heintz
- **September 25 (Wednesday)** – Business Partner Event at Urban Roost – 5:30-7:30 pm
- **Membership Event** – The Graduate – September 12th at 5:30 p.m.

- **October 22 (Tuesday)** – Gender Pay Gaps and Audits – Karen Elliott – Willow Oaks - Noon
- **November 20 (Wednesday)** – Manners Matter: Your Secret Weapon for Business Success – Liz Bryant – Hunton Andrews Kurth – Noon (parking paid)
- **December 12 (Wednesday)** – Holiday Luncheon – The Jefferson

Meeting Sponsor Introduction/Raffle:

- **Stone's Office Equipment** – Sam Stone
  - Prize drawing? None
- **ALPs** – Shawnda White – No Show
  - Prize drawing?
- **Planet Depo** – JJ Rochefort – No Show
  - Prize drawing?

Presentation

Speaker: **Jamie Walker, CPA**

About Our Speaker and Introduction

A Tax Partner with Cherry Bekaert, Jamie focuses his practice on meeting the tax and growth needs of privately-held and family businesses, professional practices and high-net-worth individuals. Based in the Firm's Richmond, Virginia office, he assists clients needing guidance in the areas of corporate and individual tax minimization strategies, succession planning, business consulting and estate planning.

Prior to joining Cherry Bekaert in 2014, Jamie was with a local CPA firm before establishing his own practice in 1983. He has more than 30 years of experience serving closely-held businesses and their owners.

Jamie Walker will discuss recent court cases between the IRS and law firms. This is an excellent opportunity to learn how these cases will impact your firm.

Total No. Members Attending	13
Total No. Guests w/Member	1
Total No. Guests w/BP	
Other Guests	
Speaker(s):	1
Business Partners	6
TOTAL	21

ALA Meeting - August 2019

Name	Last Name	Company	Type	Attendance
Barbara Allen-Smith	Allen-Smith	Carrell Blanton Ferris & Associates, PLC	Member	X
Christina Bloom	Bloom	Goodman Allen Donnelly	Member	X
Lois Broadwater	Broadwater	Coates & Davenport	Member	X
Mary Ellen Cleveland	Cleveland	ThompsonMcMullan	Member	X
Dave Cummings	Cummings	Allen, Allen, Allen & Allen	Member	X
Abigail L. Davis-Hess	Davis-Hess	ReidGoodwin, PLC	Member	No Show
Kathleen Deaner	Deaner	Setliff Law, PC	Member	X
Pamela (Pam) Frazier	Frazier	Barnes & Diehl	Member	X
Maryann Hartzell	Hartzell	CowanGates	Member	X
Anne Henkel	Henkel	Goodman Allen Donnelly	Member	X
Judith Lancaster	Lancaster	Swedish Match	Member	X
Jillian Marchant	Marchant	Kaplan Voekler Cunningham & Frank PLC	Member	X
Paul Mustian	Mustian	Christian and Barton	Member	No Show
Kendall Ruby	Ruby	Harman Claytor Corrigan & Wellman	Member	X
Kathryn (Kathy) Scourby	Scourby	KNS Consulting, LLC	Member	X
Mark Tucker	Tucker	Spotts Fain PC	Member	No Show
Donna Baird	Baird	Lexis Nexis	Guest	X
Tina Branham	Branham	ALL-STATE LEGAL	Guest	X
Liz Coleman	Coleman	Prime Legal	Guest	X
Michael Flaherty	Flaherty	ALPS	Guest	No Show
Dave Johnson	Johnson	The Supply Room	Guest	No Show
Lucus Killmeier	Killmeier	Stone's Office Equipment	Guest	X
Jennifer Morris	Morris	Kaplan Voekler Cunningham & Frank PLC	Guest	X
DeAnn Pangburn	Pangburn	Atlantic Union Bank	Guest	X
Sam Stone	Stone	Stone's Office Equipment	Guest	X
Shawnda White	White	ALPS	Guest	No Show
Speaker				
Jamie Walker, CPA	Walker	Cherry Bekaert	Speaker	X
Walk-In				
		Total - Actual Attendees	**21**	