

SAMPLE PARTNERSHIP MEETING MINUTES FOR JONES & SMITH ACCOUNTING PARTNERS

I. MEETING DETAILS

Meeting Leaders: **Roberta Stevens, Allen Queen**
Secretary: **Jackie Page**

Date: **January 6th, 2020**
Time: **11:00 AM EST**

Location: **Westside Alpine Building, Conference Room G**
Street Address: **9000 S.W. Main Street**
City: **Jacksonville** State: **Florida** Zip: **00012-2211**

URL or Dial-In Number: **N/A**

II. ROLL CALL.

Roll call initiated – Secretary page – 11:05 AM

The following persons were in **attendance**:

- **Roberta Stevens (CEO, Partner)**
- **Allen Queen (CFO, Partner)**
- **John Robinson (COO)**
- **Jackie Page (Secretary)**
- **Rebecca Hope**
- **Stan G. Richardson**
- **Fred Aaron**
- **Jeffrey Clooney**
- **Stephanie Thompson**
- **Camila Alvarez**
- **Chad F. Lentil**

The following persons were **absent**:

- **Dan Stones**
- **Jacob Peck**

III. CALL TO ORDER.

Call to Order – Secretary Page – 11:10 AM

Previous Meetings Minutes Distributed – Secretary Page – 11:15 AM

Distribution of prior meeting minutes; last meeting took place on December 6, 2019. The minutes were approved unanimously by all the attendees.

Meeting Agenda Distribution – Secretary Page – 11:25 AM

A meeting agenda was distributed to all attendees of the meeting. After providing five (5) minutes to review, a vote of the meeting agenda was produced.

At 11:32 AM, the agenda was approved with unanimous votes. No major motions to change, amend, or otherwise alter the agenda occurred.

IV. PARTNERSHIP DEVELOPMENT.

Quarterly Reports – Allen Queen & Roberta Stevens – 11:35 AM

Sales and quarterly reports for Mr. Queen's branch were issued to all attendees. There was a 21% increase since last month's meeting due to the roll out of paid advertising.

Mrs. Stevens provided reports for her branch, as well. Numbers were average, but it was noted an increase will likely occur due to the upcoming tax season.

V. UPCOMING PRIORITIES.

Tax Season 2020 – Roberta Stevens – 12:15 PM

The partnership will be strengthened over tax season. Stevens and Queen have implemented several collaborations for client outreach, targeted advertisement, and effective procedures.

Mrs. Stevens issued documents noting the new changes for the upcoming tax season.

The future of the partnership will be evaluated after the tax season has ended. Meeting scheduled for April 20, 2020, in order to follow up.

VI. OTHER ITEMS.

Input from Staffers – All attendees – 12:45 PM

Attendees were encouraged to provide feedback regarding the partnership. Many expressed concerns regarding the tight office situation. Others praised the communication between both legal departments and how it benefits operations.

VII. ADJOURNMENT.

Approval of Meeting Minutes – Secretary Page – 1:05 PM

Meeting Adjourned – Secretary Page – 1:15 PM

Submitted by:  _____

Print Name: Roberta Stevens

Approved by:  _____

Print Name: Jackie Page