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SEE YOUR ARTICLE HERE!

The editors of the chapter newsletter would like to invite you to contribute. If there is something new or exciting that you would like to share with your colleagues, or if you have photos of a recent event, or ideas on how to make the newsletter more interesting and fun...

Please contact the editors at nassaunewsletter@nysscpa.org.



John Barone
*President,
 Nassau Chapter*

PRESIDENT'S Message

It is with bittersweet emotions that I write my last president's message. It has been a busy year with high points and low points. Overall, serving as your President has been my pleasure and honor. I hope that I've helped lead the chapter in the right direction. It has been my goal to highlight the good people and good works of the Nassau chapter. I also tried to encourage increased involvement from our membership. From my perspective, I know that involvement in the NYSSCPA and in particular the Nassau chapter has made me a better accountant and a better person. Thank you for your support over this past year.

I leave the chapter in good hands. Mark Stone brings energy and a willingness to re-think ideas that may have become outdated. His board is an efficient mix of new involvement and experienced members. I look forward to what they will bring to the future of the Nassau chapter.

It is with sadness that I must recognize the untimely passing of a person who was active in the chapter and kindred spirit of mine. Ellen Gordon passed away in March leaving behind a husband, two children, and a legacy of good deeds. You might remember Ellen from her involvement in the Estate and Personal Financial

Planning Committee, or the Community Affairs and Public Relations Committee. Perhaps you worked with her while she served on the Executive Board. She may have reached out to your firm to request feedback and involvement while she was the co-chair of the Membership Committee. The point is that Ellen was always willing to put herself where there was a need. I can not remember a time when Ellen did not offer to assist when she was able.

Ellen was a health and exercise fanatic. In fact, she was also a speed walker. As a tribute to her life of service the Executive Board has unanimously decided that the annual chapter sponsored charity walk/run be renamed the "Ellen Gordon - CPAs for a Cause 5k". In her memory, I would like to make this year's event the most successful ever. Please save the date June 6, 2008 to join us for this special community event. Please register as a participant and encourage your firm to join us as a corporate sponsor.

Sincerely,
John Barone, CPA
*President,
 Nassau Chapter*
 Contact: jbarone@weiserllp.com

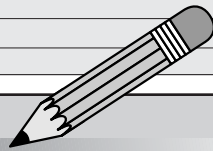
NEW YORK PENSION EXEMPTION AVAILABLE UPON DEATH

New York allows an annual \$20,000 exclusion from taxable income for qualifying pension and annuity income from an annuity or retirement plan. A retirement plan includes Individual Retirement Accounts, Self Employed Retirement Plans (SEPS, SIMPLE, and Keoghs), and all qualified plans pursuant to the Internal Revenue Code. The question that often arises with this annual exclusion is whether

the exclusion can be availed of upon death of the decedent.

GENERAL EXCLUSION RULE

The maximum exclusion allowed for any New York Resident can never exceed \$20,000 per year. For a married couple, each resident spouse



www.nyscpa.org
NYSSCPA
certified public accountants
NASSAU CHAPTER
Newsletter

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- President Elect**
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- Membership**
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- Newsletter**
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KUNJAN MEHTA, CPA
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MICHAEL SIINO, CPA
- Small Firm MAP**
SCOTT SANDERS, CPA
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Kenneth Hauptman, CPA
- Taxation**
JACK ANGEL, CPA
RONALD M. FINKELSTEIN, CPA, JD
MARK PLOSTOCK, CPA
- Young CPAs**
DEEPTI KHANNA
VIKRAM SINGH

EDITORS *Corner*

Nassau Members,

Sam Traum Elected to NYSSCPA Hall of Fame

Nassau County's own beloved Sam Traum will be inducted into the New York State Society of Certified Public Accountants Hall of Fame this May. The society recognized his leadership skills and his long record of service in bestowing this award.

Sam, who passed away in 2004, was well known in the chapter as an innovator and a tireless service provider. He was instrumental in the creation of the All-day Estate and Personal Financial Planning Seminar and the All-day Accounting and Auditing Seminar. The Nassau Chapter continues to provide these seminars to the membership today. Even people who never met Sam owe him a debt of gratitude. Of course if you were even slightly active in chapter events prior to 2004, you probably met Sam Traum. Long after most people would have retired to someplace warm, Sam was still attending chapter meetings, lectures and committee meetings. He always encouraged young CPAs and especially women and minorities. To honor his legacy, the Nassau Chapter presents an award each year to a woman or minority who excels the most during the year, or someone who actively promotes programs for these groups as Sam has done in the past.

Newsletter Editors

CALENDAR OF EVENTS

May 2008			
5/3	Sat.	All-Day Estate & Personal Financial Planning Conference	
5/8	Thurs.	CFO & Financial Exec. Committee	
5/8	Thurs.	Litigation Support Committee	
5/9	Fri.	55th Annual Nassau Chapter Installation Dinner/Dance	
5/15	Thurs.	MAP Committee	
5/16	Fri.	Membership Committee	
June 2008			
6/6	Fri.	CPAs (4): a Cause 5k	
6/30	Mon.	Golf Outing	

Save the Date 55th Annual Installation Dinner/Dance Bringing It Back to the Oldies

**Nassau Chapter
New York State
Society of
Certified Public
Accountants**



**Friday, May 9, 2008
7:00 p.m.
The Crest Hollow
Country Club
Woodbury, NY**

**Please Join Us As We
Kick Off the 2008/2009 Year.**

Send in your registration coupon today!

Reservation Form

55th Annual Installation Dinner/Dance
Nassau Chapter
New York State Society of Certified Public Accountants
Friday, May 9, 2008

Please join us as we kick off the 2008/2009 year.

Dear Mark:

Please find enclosed a check for \$ _____ (\$99.00 each;
\$198 per couple
\$990 for a table of 10). Please make checks payable to:
NYSSCPA, Nassau Chapter.

Name: _____
Name of Firm: _____
Address of Firm: _____
Telephone: _____
Fax: _____



Names of individuals attending:

Please seat me with the following people

**Please mail this coupon with a
check by April 20 to:
Mark Stone, CPA
MWE
400 Garden City Plaza
Suite 500
Garden City, NY 11530**

Date: Friday, May 9, 2008
Time: 7:00p.m.
Location : The Crest Hollow Country Club
8325 Jericho Turnpike Woodbury, N.Y.

Nassau Chapter 26th Annual All-Day Estate and Personal Financial Planning Conference

Saturday, May 3, 2008

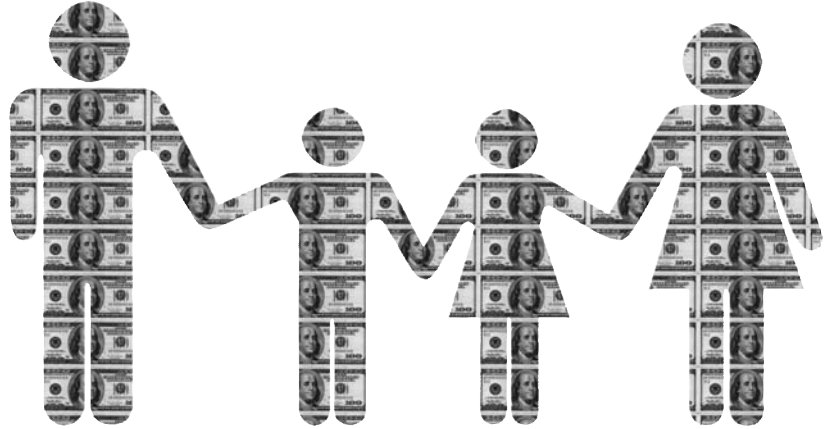
8:30 a.m. – 4:30 p.m.

(Check-in begins at 8:00 a.m.)

Melville Marriott Long Island

1350 Old Walt Whitman Road

Melville, NY 11747



CONFERENCE TOPICS

- **Family Limited Partnerships: The Accountant's Role**
Robert S. Barnett, CPA, Esq., Capell Barnett Matalon & Schoenfeld
- **College Financial Planning**
Gary Carpenter, CPA, CCPS, College Planning Services.
- **Key Life Insurance Techniques in Estate Planning**
Steven H. Goodman, CPA, MBA, Slavutin and Goodman Insurance Services
- **GRATS**
Neil Fang, Esq., Schwartz & Fang, P.C
- **Long-Term Care Insurance**
Sam Miller, MBA, CLU, ChFC, CASL, John Hancock Financial Services
- **Generation-Skipping Tax Planning**
Neil Katz, Esq., Katz, Bernstein & Katz, LLP
- **Charitable Gifting as a Tax and Estate Planning Tool**
Barbara Diehl, American Red Cross
- **Medicaid Planning**
Marilyn Gormley, Esq. Gormley & Gormley, PLLC

Presented by the Estate and Personal Financial Planning Committee, Nassau Chapter, New York State Society of Certified Public Accountants

Credit Hours: 8 (Taxation)
Member Fee: \$150
Nonmember Fee: \$250
 To register call 800-537-3635

Registration Coupon

Nassau Chapter 26th Annual All-Day Estate and Personal Financial Planning Conference
 Saturday, May 3, 2008

Name: _____ Membership # _____

Address: _____

City: _____ State _____ Zip Code: _____

Phone # _____ E-mail Address: _____

Course Code: 28603822

Member Fee: \$150

Nonmember Fee: \$250

Make checks payable to the FAE

Mail to: P.O. Box 34782 Newark, NJ 07189-4782

(note: all FAE registration policies and procedures apply visit our website for details www.nysscpa.org)

RECIPIENTS OF 2008-09 AWARDS

SAMUEL B. TRAUM ACHIEVEMENT AWARD

ELIZABETH A. HAYNIE

DISTINGUISHED SERVICE AWARD

FRANK W. SLUTER

CONGRATULATIONS TO THE WELL DESERVED HONOR BESTOWED
 ON BOTH ELIZABETH AND FRANK.

IN ADDITION, IN MEMORY OF ELLEN GORDON, WE HAVE CHANGED
 THE NAME OF OUR ANNUAL CHARITY EVENT TO:

ELLEN GORDON CPAs 4(a): CAUSE 5K WALK/RUN

ALL PRESENTATIONS WILL BE DONE ON MAY 9TH, AT
 THE 55TH ANNUAL DINNER DANCE AT THE CREST HOLLOW COUNTRY CLUB.

SAVE THE DATE!
**THE NYSSCPA NASSAU
 CHAPTER MEMBERSHIP
 COMMITTEE MEETING**

Focus: Women, Minorities &
 New Members

Friday, May 16, 2008

Chairperson: Lisa Haynie, CPA, M.S.

Guest Speakers: Lara R. Chwat, Esq., Katz
 Bernstein Katz, LLP

Helayne Urban, Helayne Urban
 Credit Coach, Inc.

OPEN TO ALL APPLICABLE MEMBERS

Topics: To be announced

Please email, fax or mail your response to:

Lisa Haynie
 Katz Bernstein Katz LLP
 6900 Jericho Turnpike
 Syosset, NY 11791

Phone (516) 364-5100 Fax (516) 364-5166
 Email lisahaynie@kbktaxlaw.com

I will attend the 12:00 p.m. luncheon at the Milleridge and
 enclosed is my payment of \$30 (payable to "NYSSCPA-
 Nassau Chapter").

I will not attend the Milleridge luncheon at 12:00 p.m.,
 but I am interested in becoming more active within
 the NYSSCPA's Nassau Chapter.

Name: _____

Firm Affiliation: _____

Email Address: _____

Telephone: _____

- Learn new technical areas that can enhance your practice. •Develop professional contacts.
- Give back to your profession and community. •Get recognized for what you do.
- Give the CPA profession a good reputation. •Have a say in what your chapter does.
- Get involved in public speaking. •Get published.

The Nassau Chapter is one of the leading chapters in the state, with a very active membership. To maintain this, we need our membership to get involved and join a committee.

If any one of the above intrigues you, consider a joining a committee. The organizational meetings will be occurring this summer. Keep the Nassau Chapter strong! The organizational meetings are as follow:

Committee	Chairperson Contact	Date Org Mtg	Purpose of Committee
Nassau Chapter Accounting & Auditing Committee	Andrew Ross 516-364-3390 x 246 aross@gmlny.com	6:15 p.m. on June 19 Gettry Marcus Stern & Lehrer 20 Crossways Park North, Ste 304 Woodbury, NY 11797	Accounting and auditing technical issues.
Nassau Chapter Attorneys and Accountants Joint Committee	Noelle Geiger 212-503-8940 ngeiger@markspaneth.com	5:30 p.m. on June 12 Marks Paneth & Shron 88 Frohlich Farm Boulevard Woodbury, NY 11797	Networking and other common issues both professions face.
Nassau Chapter CFO & Financial Executive Committee	Manlio Cafiero 516-248-9096 x 614 mcafiero@scalesair.com	8:00 a.m. on June 11 Meltzer, Lippe 190 Willis Avenue Mineola, NY 11501	Common issues facing CFOs and other financial executives.
Nassau Chapter Community Affairs & Public Relations	Roy Massa 646-435-1581 roymassa@yahoo.com	5:00 p.m. on May 15 Island Harvest 199 Second Street Committee Mineola, NY 11501	Good-works committee runs blood drive, walk/run for charity, and high school outreach.
Nassau Chapter Cooperation with Educational Institutions	Elizabeth Venuti 516-463-5359 elizabeth.k.venuti@hoftra.edu	12:00 p.m. on June 2 Satty Levine & Ciacco 125 Jericho Turnpike, Ste 200 Jericho, NY 11753	Networking aimed at educating accounting students about CPA firms.
Nassau Chapter Estate & Personal Financial Planning Committee	Elizabeth Eckert 516-678-5300 zzeeva@aol.com	6:00 p.m. on June 17 Margolin Winer & Evens 400 Garden City Plaza, 5th Floor Garden City, NY 11530	Estate, trust, and financial planning technical issues.
Nassau Chapter Federal Taxation Committee	Jack Angel 516-487-1494 jack@jackangelcpa.com	6:00 p.m. on June 3 Margolin Winer & Evens 400 Garden City Plaza, 5th Floor Garden City, NY 11530	Federal and state technical issues.
Nassau Chapter Litigation Support Committee	Philip Kanyuk 516-364-3390 x 212 pkanyuk@hrrllp.com	8:00 a.m. on June 10 Holtz Rubenstein Reminick 125 Baylis Road, Ste 300 Melville, NY 11747	Litigation support business and technical issues.
Nassau Chapter Medical & Other Professionals Committee	Neal Guber 516-488-1200 nguber@mrweiser.com	6:00 p.m. on June 5 Weiser 3000 Marcus Avenue, Ste 2W1 Lake Success, NY 11042	Industry and technical issues in the medical and other professions.
Woman's Focus Group and Membership Committee	Elizabeth Haynie 516-364-5100 lisahaynie@kbktaxlaw.com	6:00 p.m. on June 10 Margolin, Winer & Evens 400 Garden City Plaza, 5th Floor Garden City, NY 11530	Increasing general membership and seminars aimed at women.
Nassau Chapter Real Estate Committee	Michael Siino 212-503-6320 msiino@markspaneth.com	9:00 a.m. on June 19 Marks Panneth & Shron 88 Frohlich Farm Boulevard Woodbury, NY 11797	Industry technical issues focusing on real estate
Nassau Chapter Small Practice Unit MAP Committee	Scott Sanders 516-938-5219 ssanders@lstcpas.com	9:00 a.m. on May 14 Lazar Sanders Thaler and Assoc. 350 Jericho Turnpike, Ste 1 Jericho, NY 11753	Technical and business issues faced by Small CPA firms.
Young CPAs Committee	Vikram Singh 516-620-8705 vsingh@weiserllp.com	5:00 p.m. on June 6 Weiser 3000 Marcus Avenue, Ste 2W1 Lake Success, NY 11042	Business, technical and networking events geared toward younger CPAs.



SPONSOR APPLICATION FORM

ELLEN GORDON CPAs 4(a): CAUSE 5K CHARITY RUN/WALK FRIDAY, JUNE 6, 2008

We are pleased to join the Nassau Chapter of the New York State Society of CPAs as a sponsor of the 7th Annual Ellen Gordon CPAs for a Cause Charity Run/Walk in support of Island Harvest, Long Island's Food Rescue Agency

Please indicate the level of sponsorship:

- PLATINUM SPONSOR -- \$1,500**
Includes logo** printed on front of the tee shirt, table (sponsor provided) and entrance for ten runners/walkers in the event and logo listing on the Island Harvest website.
- GOLD SPONSOR -- \$1,000**
Includes logo** printed on front of the tee shirt, table (sponsor provided) and entrance for six runners/walkers in the event.
- SILVER SPONSOR -- \$500**
Includes company name printed on back of the tee shirt, table (sponsor provided) and entrance for three runners/walkers in the event.
- BRONZE SPONSOR -- \$250**
Includes company name printed on a 2'x2' sign/banner to be displayed at the event.

Please make checks payable to:
NYSSCPAs-Nassau Chapter and write
“Ellen Gordon CPAs for a Cause” on the
face of the check.

PRIVATE

Print name as it should appear on tee shirt (for silver gold & platinum):

****PLEASE SUBMIT LOGO CAMERA-READY ART FOR
PLATINUM, GOLD LEVEL
SPONSORSHIP.**

Company: _____

Contact Person: _____

Address: _____

Phone: _____ e-mail: _____

For further information, call John Barone, 516 620-8508 or
e-mail:jbarone@weiserllp.com or Roy B. Massa 631 897-7182 or
e-mail:roymassa@yahoo.com

Mail check to John Barone, Weiser LLP, 3000 Marcus Ave, Lake
Success, NY 11042

Continued from cover

NEW YORK PENSION EXEMPTION AVAILABLE UPON DEATH

who qualifies for the exclusion independently is eligible to subtract up to \$20,000 from his/her income. However, neither spouse can claim any unused part of the other spouse's exclusion.

The \$20,000 exclusion is offset against the combined income received from all disability, annuity, and pension income. To qualify as pension or annuity income, the taxpayer has to be 59 1/2 before January 1st and the pension and annuity income must: (1) be included in the taxpayer's federal adjusted gross income; (2) be derived from services performed as an employee before retirement or retirement plan contributions that are deductible under federal income tax law; and (3) be received in periodic payments. The periodic payment requirement does not apply to Keogh and IRA plans.

BENEFICIARY EXCLUSION ALLOWED

Upon the death of the decedent, the beneficiary can use the exclusion for the decedent's

future pension distributions. If the decedent's pension or annuity income would have qualified for the exclusion prior to death, then the exclusion can be utilized under New York Tax Law § 612(c)(3-a). In this case, the beneficiary must be either an individual or a trust created by the decedent. There is no age requirement that must be met by the beneficiary to exclude this income. It must be noted that a beneficiary receiving a distribution is entitled to only one \$20,000 exclusion.

Example: Jack receives \$15,000 annual pension income. Jack's wife, Jill receives \$17,000 annual pension income. In any one year, the combined \$32,000 of qualified pension income is excluded from New York taxes. Jack dies naming his wife Jill as the pension beneficiary of \$5,000 annually, and his 18 year old son, Jon, as the remainder beneficiary. In this case, Jill's exclusion will be limited to the \$20,000 annual exclusion for her total pension income of \$22,000; Jon will exclude the entire \$10,000 received.

EXCLUSION ALLOCATION

If the deceased has more than one beneficiary, does each beneficiary qualify for the \$20,000 pension and annuity income? Since the annual exclusion belongs to the decedent, a distribution to multiple beneficiaries upon death does not multiply the exclusion. The \$20,000 annual exclusion to which the decedent was entitled is split among the beneficiaries in the same ratio as the distributions. This allocation works as follows: a decedent leaves \$15,000 of \$30,000 total pension income to his son. His son can exclude \$10,000 ($\$15,000 \text{ received} / \$30,000 \text{ total pension} = 50\% \times \$20,000 \text{ annual exclusion}$) of the \$15,000 received from New York income taxes.

The retirement and annuity exclusion available to the taxpayer is a powerful tool. It is important to be cognizant that this tax savings vehicle continues after death.

Mark Stone
Margolin, Winer & Evens LLP

Save the Date!

NYSSCPA Annual Golf Outing Will be held
 on Monday, June 30, 2008

The Muttontown Club
East Norwich, NY

10:00 a.m. to 6:00 p.m.

Cost: \$ 450 for individual golfer
 \$ 175 for dinner only
 \$ 1,900 for foursome

contact: Coral Pinto: 516-937-9500
 Please register by May 31.

NYSSCPA - NASSAU CHAPTER SMALL FIRM MAP COMMITTEE MEETING

June 20, 2008
On Parade Diner
7980 Jericho Turnpike
Woodbury, NY 11797

Topic: Personnel

This 2 hour CPE session will address the issues below and more.

- Develop written performance standards for all levels
- Communicate performance standards properly to all new hires
- Review a sample performance evaluation form with new hires during orientation
- Don't wait for formal reviews to discuss problems
- Recognition of achievements and/or progress
- Establish an open-door policy
- Interviewing and hiring
- Employee manuals

Speakers: Scott Sanders, CPA, PFS, CFPÆ, CFS,
Eliot Lebenhart, CPA
Kenneth Hauptman, CPA

CPE: Pending – 2 credits

Time: 8:00–10:00 am – Breakfast (Be prompt!)

Place: On Parade Diner
7980 Jericho Turnpike, Woodbury, NY

Cost:* \$20 per person pre-paid, pre-registered
\$22 per person at the door
Payable to: NYSSCPA - Nassau Chapter

Chairpersons: Scott Sanders, CPA, PFS, CFPÆ, CFS,
Eliot Lebenhart, CPA
Kenneth Hauptman, CPA

We look forward to seeing you there!

*Refund/Credit Policy - If you send payment and are unable to attend the monthly meeting, we will issue a credit to you which will expire in 6 months. There are no refunds.

Please note - meetings are subject to change.
Notifications will be sent to all registered attendees via e-mail should this occur

NYSSCPA - NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE

Please pre-register by calling Jean at 516-938-5219 or you can e-mail her at jtowndsend@lstcpas.com or fax this page to 516 938-0491

Please mail your check prior to the meeting to:
Scott Sanders, CPA, PFS, CFPÆ, CFS
Lazar Sanders Thaler & Associates, LLP
350 Jericho Turnpike, Suite 1
Jericho, New York 11753-1317

I am enclosing a check for \$_____ at \$20 per person, payable to NYSSCPA – Nassau Chapter

I will be using my credit memo, which I will bring with me to the meeting.

Name: _____

Firm: _____

Address: _____

Telephone: _____

Facsimile: _____

Cell: _____

E-Mail: _____

CPA Cert # _____

Signature: _____ Date: _____



Per Diem Help or Employment

Are you seeking a per diem position or looking to hire per diem assistance? Why look to outside sources when the Nassau Chapter is here to help? Did you know that the NYSSCPA has an online registry to assist it's members in finding a position or a CPA to assist when you need help? Here's how to use it:

• **Go to:**

1. <http://www.nysscpa.org/>
2. find chapters
3. Nassau
4. help wanted
5. post a job ad
6. positions available or seeking employment

• **Have available:**

1. your **six-digit** (this may include a preceding zero) in-state CPA Certificate number
2. a category of your professional expertise (e.g., audit, taxation, etc.)
3. a description of the kind of position you are seeking and relevant background

4. areas of specialization within your chosen category and relevant details to help a prospect determine suitability.

The ad will show your areas of expertise (as provided to the NYSSCPA through its annual questionnaire) to help firms identify your professional skills. Though not mandatory, if you wish, you can update this information online via "Membership Data Center >> Update Areas of Expertise."

Members can also post a resume at no charge at the Career Center. A link to take you there will be available while posting your per diem listing. You can contact Member Relations at 1-800-NYSSCPA if you have questions on any of this once you are online.

CPA Tech Expo to Reward Early Registrants

NEW YORK – The first 500 CPAs and financial professionals to register for the 2008 CPA Business Tech Expo are in a win-win situation. Here is how: first, they are automatically entered into a raffle to win a free iPhone, courtesy of the New York State Society of CPAs; second, they will also be rewarded with exposure to cutting-edge technology for their businesses and clients. The two-day show will feature FAE's quality education, and product demos from dozens of exhibitors.

The CPA Business Tech Expo, which is being held on Wednesday, May 14, and Thursday, May 15, at the Hilton New York, is the largest gathering of accounting and financial professionals in New York City. The show focuses on exhibitors delivering the latest products and services geared toward today's professionals.

The show also offers several CPE sessions from the Foundation for Accounting Education.

CPE sessions include:

- Accounting & Auditing
 - Taxation
 - Technology
 - Ethics
 - Charitable Giving
 - Risk Management
- And more!

Registration to the Show Floor is free. To register, please visit www.nycpashow.com or call 800-537-3635.



NYSSCPA
 3 Park Avenue
 New York, NY 10016-5991

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 RETURN POSTAGE GUARANTEED

INFORMATION AND HOTLINES

Have a Tax Problem?

The following members of the Taxation Committee are available to help answer your questions:

General

- Fred Levine, CPA (516) 338-9500
- Jack Angel, CPA (516) 487-1494
- Kevin Ondik, CPA (516) 579-7900
- Robert Lusthaus, CPA, Esq. (516) 937-1366
- Jay Oher, CPA (631) 225-9801
- Karen J. Tenenbaum, Esq., LLM, CPA (IRS & NYS) (631) 465-5000

Taxing Authorities

- Ruth Sattig Betz, CPA (NYS) (516) 249-1919
- Sam Deutscher, CPA (IRS) (212) 239-3300
- Noelle T. Geiger, Esq. (IRS & NYS) (212) 503-8940
- Yvonne Cort, Esq. (IRS Forms 433A & B) (631) 465-5000

Emergency Assistance Hotline

The committee member to call in the event of the disability or death of a member is:

- John Kearney, CPA (516) 746-5980

Accounting and Auditing Technical Questions Hotline Volunteers

- Thomas O. Linder, CPA** (631) 462-1213
Linder & Linder Tlinder72@cs.com
- Fred R. Goldstein, CPA** (516) 249-2882
- Mark Mycio, CPA** (212) 372-1421
RSM McGladrey Inc. mark.mycio@rsmi.com

Estate and Personal Financial Planning Committee Technical Questions Hotline Volunteers

- Eric Kramer, CPA, Esq.** (516) 227-0738
- Richard Zerah, CPA/PFS, CFP, CMFC** (516) 735-4717

Resume Assistance

- Robert Pickus, CPA** (212) 812-8452

NASSAU CHAPTER Newsletter

DEADLINES

All submissions are due to Editors at nassaunewletter@nysscpa.org Eight weeks prior to issue date

Newsletter Issue	Submission Due Date
November	September 1st
December.....	October 1st
January.....	November 1st
April.....	February 1st
May.....	March 1st
September.....	July 1st
October.....	August 1st

Newsletter now downloadable on the nysscpa.org website.

All Practitioners Seeking Per Diem

Help or Employment...

Please register at www.nysscpa.org. How? See details inside in "Per Diem Help or Employment."

Newsletter Committee Coeditors:

Kunjan Mehta, CPA
 Ph: (212) 624-5259
 Fax: (212) 422-0144
nassaunewletter@nysscpa.org

James Giovanelli, CPA
nassaunewletter@nysscpa.org
 Ph: (516) 336-2467
 FAX: (516) 256-3510

NYSSCPA New York State Society of Certified Public Accountants - Change Form

CPA Certificate #

Name (Last, First, Middle Initial) _____

Home Address _____

Firm Name _____ City, State, Zip _____

Firm Address _____ Home Phone _____

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