A Message From The President

With the holidays practically upon us, I’d like to take the time to wish all of our members a very happy and healthy holiday season and New Year. My hope for the coming year is that we’ll reach all of the Chapter’s goals and encourage new members to join and become active in one or more of the terrific committees we offer. During this season of giving, it’s important to note that our members find they receive just as much as they give when being a part of a committee.

First off, I would like to thank Nancy Shapiro for all of her hard work with the Chapter’s annual blood drive for the Community Affairs and Public Relations Committee. Close to 40 members donated blood this past Veterans’ Day. Thanks again to all who volunteered and participated in this successful event.

I hope all of you enjoyed our recent “Neturkeying” event, held on November 26th by the Attorney and Accountants Committee. It was nice to celebrate the Thanksgiving holiday with friends and colleagues, while networking for a good cause.

Coming up, the Taxation Committee will be holding its annual two-day event at the Long Island Marriott in Uniondale. The event, to be held on December 7th and 8th, will feature speakers such as Bob Katz, Eric Kramer, Robert Barnett, Karen Tenenbaum, Mark Klein, and more.

The Young CPA Committee will be hosting a Holiday Networking event on December 12th at Jewel in Melville. Please come and show your support for the committee, as the event will be raising money for the Ronald McDonald House Charities, an extremely worthy cause.

I’d also like to take this time to remind you that our Executive Board will be meeting over the next couple of months to prepare the Chapter fiscal budget for the year-ending May 31st, 2015 and for the new slate of officers and board. Members will be able to vote on this at our January 30th board meeting.

Thank you all for allowing me to serve as your Chapter President. I’d like to take this time to again wish you all a very happy holiday and prosperous New Year. Please know you can reach out to me at any time with any issues or concerns you may have. I’m happy to help in any way that I can.

All the best for 2014,

Sincerely,

Scott Sanders, CPA
President
Nassau Chapter
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Save The Dates:

December 2013
Accounting & Auditing
Tuesday 3rd
General A&A Update
Berdon, LLP
6:00 PM - 8:10 PM
CFO & Financial Executives
Tuesday 17th
WISP (Written Information Security Plans)
Meltzer Lippe
8:00 AM - 10:00 AM
Financial Literacy Committee
Thursday 5th
Marks Paneth Shron
88 Froelich Farm Blvd
Woodbury, NY
8:00 AM - 10:00 AM

Taxation Committee
Saturday 7th and Sunday 8th
Buying & Selling LLC
Interests, Residency, Federal and State Tax Update, Estate Planning, Day Trader/Gaming, Elder Law
Long Island Marriott
9:00 AM - 5:00 PM
Real Estate
Wednesday 4th
Guidance on the Deduction and Capitalization of Tangible Property Expenditures
Milleridge Inn
6:00 PM - 8:00 PM
Small Firm MAP
Friday 20th
Getting Ready for Tax Season
On Parade Diner
8:00 AM - 10:00 AM

January 2014
CFO & Financial Executives
Wednesday 22nd
Retirement Income Planning (emphasis on Annuities & LT Care)
Meltzer Lippe
8:00 AM - 10:00 AM
Chapter Meeting
Wednesday 15th
Town Hall Ethics
Jt. Nassau/Suffolk
Chateau Briand
6:00 PM - 8:30 PM
Cooperation with Bankers & Credit Grantors
Thursday 30th
Jt. Nassau/Suffolk
Cooperation w/ Bankers
Crest Hollow Country Club
6:00 PM - 8:30 PM

Estate Planning & Personal Financial Planning
Saturday 11th
All-Day Conference
9:00 AM - 5:00 PM
Financial Literacy Committee
Thursday 16th
WeiserMazars
8:00 AM - 10:00 AM
Taxation Committee
Tuesday 21st
Tax Credits
8:00 AM - 10:00 AM

Practice Continuity
Friday 24th
On Parade Diner
Small Firm MAP
Wednesday 29th
“Loan-Ranger”
Jt. w/ NCCPAP-N/S Chapter
On Parade Diner
8:00 AM - 10:00 AM

Chapter Officials:

President
Scott Sanders, CPA

President Elect
Robert S. Barnett, CPA, Esq.

Vice President
Philip H. Kanyuk, CPA

Treasurer
Lynne M. Fuentes, CPA

Secretary
Christine P. Hallahan, CPA

Past President
Lisa Haynie, CPA

Directors
Alex Resnick, CPA
Anthony Aronica, CPA
Eliot Lebenhart, CPA
Howard H. Fine, CPA
Anthony Basile, CPA
Geri Gregor, CPA
Joel Dressner, CPA
Cynthia Sze, CPA

Accounting & Auditing
Jeffrey Yonkers, CPA
Mark Goldschmitt, CPA
Mark R. Cuccia, CPA
Marcy Greenfield, CPA
Joel Reisman, CPA

Accounting & Auditing
Kristina Albarella, CPA
Jill Scher, CPA

CFO & Financial Executives
Manlio Cafero, CPA
Anthony Aronica, CPA

Cooperation with Bankers & Credit Grantors
Neal Korenberg, CPA

Cooperation with Educational Institutions
Anthony Basile, CPA
Michael D. Katz, CPA
Abby Lucrezia

Estate & Personal Financial Planning
Christine P. Hallahan, CPA
Eric M. Kramer, CPA, Esq.
Scott Sanders, CPA

Financial Literacy
Karen J. Tenenbaum, CPA, Esq.
Cynthia Sze, CPA
Timothy Coville, CPA
Justine DeVito Tenney, CPA

Litigation & Forensic Services
Nannette Watts, CPA
John M. Spatola, CPA

Management of Accounting Practice
Louis Grassi, CPA

Membership
John V. Pellitteri, CPA

Medical & Other Professionals
Neal Guber, CPA

Newsletter
Lynne M. Fuentes, CPA
Michael Gaines, CPA
Lisa Haynie, CPA
Edwin J. Kliegman, CPA

Practice Continuity
Eliot Lebenhart, CPA
Craig Morris, CPA
Larry Bloom, CPA
Anthony Basile, CPA

Real Estate
Cynthia Sze, CPA
Joel Dressner, CPA
Vivian Martinez, CPA

Small Practice Unit Map
Eliot Lebenhart, CPA
Kenneth Hauptman, CPA
Scott Sanders, CPA
Alex Resnick, CPA

Sponsorship Committee
Scott Sanders, CPA
Howard Fine, CPA

Taxation Committee
Robert J. Schaffer, CPA
Robert Barnett, CPA, Esq.
Iola Damante, CPA

Technology Committee
Mark Plostock, CPA

Women’s Focus Group
Christine P. Hallahan, CPA
Geri Gregor, CPA
Toni-Ann Dalton, CPA
Elizabeth Oberg, CPA

Young CPAs
Joshua S. Sechter, CPA
Bruce A. LaMarca
Carmelina Hernandez, CPA

Like Us On Facebook
https://www.facebook.com/NYSSCPANassau
Connect With Us On LinkedIn
http://www.linkedin.com/groups?gid=5010322&most-Popular=&trk=tyah&trkInfo=tas%3Anysscpa%20nassau

Chartered 1953
NASSAU CHAPTER
www.nysscpa.org

NEW LETTER OVERVIEW & USEFUL INFORMATION
The Litigation & Forensic Services Committee has a rich history within the Nassau Chapter and statewide, as the Business Valuation and Litigation Support Committee. Since its inception, it has provided innovative and informative programs in order to help better educate the Chapter members regarding various services, resources, and programs related to business valuation, fraud/forensic accounting, and dispute resolution services.

The Nassau County Litigation & Forensic Services Committee mission statement is as follows:

- To educate and advise members as to:
  - Business valuation
  - Fraud investigation, prevention and detection
  - Forensic accounting
  - Dispute resolution services

The educational efforts of the committee are achieved by providing pertinent and current support for various accounting practice niches through continuing professional education (CPE) events.

The need for this committee was client driven; as specific issues became more prevalent, it became necessary to create a group that would be able to direct clients and members to the proper resources. In doing so, we found that firms were able to partner up in many instances and develop both a synergy and camaraderie— all while providing the best and most relevant services for the client.

When the committee was first formed in the late 1980s, the focus was on equitable distribution cases within the matrimonial court. Such cases gave rise to the need for business valuation services and the committee has since broadened itself to encompass various complex topics throughout the years including shareholder disputes, gift and estate matters, economic damages, and fraud and forensic accounting. The need for fraud and forensic accounting services has never been more relevant than in the last decade, due to the recession, the collapse of the banks, and numerous investment scandals.

Due to the pervasive nature of many of these topics, the Suffolk Chapter has recently introduced its own Forensic and Valuation Services Committee. We are hoping to partner with this new committee on a joint program sometime in the future.

Of the many topical areas on deck for the Committee, business valuation is likely of most interest, due primarily to the aging baby-boomers and the need for succession planning. Economic damages are next and will focus on wrongful death, wrongful termination and other employment related claims. The fraud and forensic accounting session will focus on the design of internal controls and how to investigate and manage a fraud claim when one occurs. Lastly, anything related to dispute resolution would most likely be presented from a mock trial perspective, i.e., “How a financial expert can assist in the courtroom.”

The speakers’ roster will be comprised of attorneys, economic experts, CPAs within each discipline, and IT experts. The programs will cover broad areas and timely topics, so it’s anticipated that there will be an excellent turnout for all of the events.

More details on the upcoming events will be provided once they become available. In the meantime, your ideas are most welcome. The committee is always looking for good, solid individuals to participate in its efforts. Thank you for your support.

For more information, please contact:

Nanette Watts
Nwatts@nsllpcpa.com

John M. Spatola
jspatola@nsllpcpa.com

Ernest P. Smith
epsmith@nsllpcpa.com
The Nassau Chapter Practice Continuity Committee was formed to provide our members with a resource for education, networking and assistance with concerns about firm succession under extraordinary circumstances. Towards this goal, our committee meets quarterly to discuss succession issues, conducts networking opportunities and provides educational materials to assist our members. I’d like to take this opportunity to thank the speakers at our October 25, 2013 meeting. Jonathan Gassman, CPA, of Gassman Financial Group and Deidre Siegel, Founder and CEO of PEAR™ Core Solutions, Inc., spoke about human resources as a solution to CPA succession. The information they provided was insightful and actionable, and promoted a lively discussion. CPA’s who attended left with ideas they can plan their succession with, and we thank these speakers very much.

Our next meeting will be held on January 24, 2014. Alex Resnick, CPA and partner with Wild, Maney & Resnick, CPA’s, has organized a meeting on Practice Continuation arrangements, including attention to legal and regulatory limitations, ethical concerns and exposure to liability issues. Alex has arranged guest speaker Kenneth Gross, of PACE Professional Services and Thomas Maisero of Wilsner, Elser, Moskowitz, Edelman & Dicker LLP. Ken and PACE specialize in malpractice insurance coverage for the CPA industry including understanding the special needs of practitioners during acquisitions, mergers, practice continuation agreements, retirements, and other situations both common and unusual. Thomas represents accounting firms and related organizations in the full range of their legal matters, including litigation of malpractice claims, investigation of ethics violations, disputes over restrictive covenants, litigation of securities fraud claims, and responses to subpoenas from the IRS and SEC. He also advises on the licensing process, partnership agreements, cyber breaches, mergers and acquisitions and other areas. Topics will include discussions on all matters related to practice continuation and similar CPA relationships.

Our final meeting for the Chapter year is scheduled for April 25, 2014. Robert Barnett, an attorney and partner in the firm of Capell Barnett Matalon & Schoenfeld LLP will join together with Joel Sinkin, President of Transition Advisors, LLC, a firm that exclusively consults on transactions for public accounting firms, to address the structural, tax and contractual details to be considered in succession arrangements.

We apologize to those who planned to attend our November Networking Cocktail Hour. Conflicts with various events required us to reschedule. We heard from many of you that you wanted to attend but could not. Our event is rescheduled for January 16, 2014. Watch for an announcement on the rescheduled date.

Please mark your calendar and register for our January 24, 2014 meeting at 8AM at On-Parade Diner using the coupon in this newsletter. For more information, on this event or our Committee, contact us at ginette@morriscpas.com. We look forward to seeing you in the New Year.

Craig R. Morris, Chairman
Larry Bloom Co-chairman
Anthony Basile, Co-chairman
Eliot Lebenhart, Co-chairman
NYSSCPA Nassau CFO Committee

The CFO & Financial Executives Committee would like to invite CPAs in industry to participate in our monthly meetings. Our committee provides a confidential forum for CFOs to seek advice and provide experienced guidance to fellow professionals. Prior to each seminar, the committee allocates time for a “roundtable” discussion. Prospective members should be a CFO or the most senior financial person at their company. The dates and topics for our upcoming committee meetings are detailed below. We look forward to seeing you at a meeting soon.

<table>
<thead>
<tr>
<th>DATE</th>
<th>TOPIC</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan. 22, 2014</td>
<td>Retirement Income Planning</td>
<td>Mineola</td>
</tr>
<tr>
<td>Feb. 25, 2014</td>
<td>LinkedIn &amp; Social Media for CFOs</td>
<td>Melville</td>
</tr>
<tr>
<td>Mar. 25, 2014</td>
<td>Commercial Insurance Update</td>
<td>Mineola</td>
</tr>
<tr>
<td>Apr. 22, 2014</td>
<td>PEOs &amp; Self Insurance</td>
<td>Mineola</td>
</tr>
<tr>
<td>May 20, 2014</td>
<td>CFO Best Practices</td>
<td>Mineola</td>
</tr>
</tbody>
</table>

Committee meetings are held on a monthly basis from September through June.

MEETING TIME & FORMAT:
8am to 10am (Two CPE credits)        light breakfast served        $10 meeting fee

MEETING LOCATIONS:
Mineola: Meltzer, Lippe, Goldstein & Breitstone - 190 Willis Ave., Mineola, NY 11501
Melville: location to be decided

COMMITTEE CO-CHAIRS:
Anthony Aronica, CPA, CFO: Graphic Paper aaronica@GraphicPaper.com 631-964-8225
Manlio Cafiero, CPA, CFO: Scales Industrial mcafierno@scalesair.com 516-248-9096

Please RSVP:

Email this form to: aaronica@graphicpaper.com
Or fax this form to: 631-439-8822
## Upcoming Meetings

**NYSSCPA – Nassau Chapter**

### Small Firm MAP Meeting Topics 2013-2014*

**Effective July 1, 2013**

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Speaker/Moderator</th>
</tr>
</thead>
<tbody>
<tr>
<td>December 20, 2013</td>
<td>Getting Ready for Tax Season</td>
<td>Scott Sanders, CPA, PFS, CFP®, CFS, Eliot Lebenhart, CPA, Kenneth Hauptman, CPA, Alex Resnick, CPA</td>
</tr>
<tr>
<td>January 29, 2014</td>
<td>“Loan-Ranger” Joint Meeting with NCCPAP-N/S Chapter</td>
<td>Various Bankers**</td>
</tr>
<tr>
<td>February 21, 2014</td>
<td>Tax Season Issues – Roundtable Discussion</td>
<td>Scott Sanders, CPA, PFS, CFP®, CFS, Eliot Lebenhart, CPA, Kenneth Hauptman, CPA, Alex Resnick, CPA</td>
</tr>
<tr>
<td>March 2014</td>
<td>No Meeting — Tax Season</td>
<td></td>
</tr>
<tr>
<td>April 17, 2014</td>
<td>Post-Tax Season Issues — Roundtable Discussion</td>
<td>Scott Sanders, CPA, PFS, CFP®, CFS, Eliot Lebenhart, CPA, Kenneth Hauptman, CPA, Alex Resnick, CPA</td>
</tr>
<tr>
<td>June 19, 2014</td>
<td>How You Define “Running Your Practice”</td>
<td>Scott Sanders, CPA, PFS, CFP®, CFS, Eliot Lebenhart, CPA, Kenneth Hauptman, CPA, Alex Resnick, CPA</td>
</tr>
</tbody>
</table>

All meetings will be held at On Parade Diner, 7980 Jericho Turnpike, Woodbury, NY 11797

**Time:** 8:00 - 10:00 am (breakfast included)

**Paid in Advance - $25.00  Cost at the Door - $30.00 (Note new fee at Door)**

You can contact your Co-Chairmen as follows:

- Scott Sanders, CPA, PFS, CFP®, CFS: 516 938-5219
- Eliot Lebenhart, CPA: 516 430-5400
- Kenneth Hauptman, CPA: 516 364-8888
- Alex Resnick, CPA: 516 364-8888

All meetings are held on Fridays unless otherwise noted.

*Please note, meeting dates, topics and speakers are subject to change. **Speaker(s) TBD
A TECHNICAL MEETING SPONSORED BY
THE ACCOUNTING & AUDITING COMMITTEE NASSAU CHAPTER

TUESDAY
December 3, 2013

Topics:
Accounting & Auditing Update – Learn about the latest changes and developments that affect how we report and issue financial statements. An experienced speaker, George Victor will detail the latest updates.

Guest Speakers:
George Victor, CPA
Giambalvo, Stalzer & Company, CPAs, PC

Location:
Berdon LLP
One Jericho Plaza
Jericho, NY 11753

Time:
6:00pm - 6:30pm Dinner
6:30pm - 8:10pm Presentation

Course Code: To be obtained
CPE Credits: 2
Cost: $20 for and CPE Presentation

Please respond by either faxing me the attached RSVP or emailing me at mcuccia@markspaneth.com

Please RSVP ASAP. It is OK to bring your check with you to the session.

As always, we will be glad to go over any issues that may affect your practice. We start each session by asking our attendees about any issues or circumstances that they have come across in the recent few months. Our objective is to provide education and best practice guidance to the attendee regardless of the firm size.

Berdon LLP
One Jericho Plaza
Jericho, NY 11753

Please email or fax or mail to:
Mark R. Cuccia, CPA
Marks Paneth LLP
88 Froehlich Farm Blvd.
Woodbury, NY 11797
Fax: (516) 992-5909
Email: mcuccia@markspaneth.com

Dear Mark:

☐ I will attend the December 3, 2013 Dinner and CPE Presentation
☐ I will not be attending the session, but wish to obtain information about future events.

Name: __________________________________________________
Firm Affiliation: ____________________________________________
Address: __________________________________________________
City/State/Zip: _____________________________________________
Phone: ___________________________________________________ 
Cell: _____________________________________________________ 
Email: ___________________________________________________
A TECHNICAL MEETING SPONSORED BY THE REAL ESTATE COMMITTEE
Guidance on the Deduction and Capitalization of Tangible Property Expenditures

WEDNESDAY
December 4, 2013

Chairpersons:
Cynthia Sze, CPA
Vivian Martinez, CPA
Joel C. Dressner, CPA

Location:
Milleridge Inn
585 Broadway
Jericho, NY 11753
(516) 931-2201

Designed for:
Professionals involved in real estate engagements

Speakers:
Panel Discussion Members:
Donald Bender, CPA
Howard Landsberg, CPA, JD
Demetri Yatrakis, JD, LLM
Joseph Strickland, Jr., RA
WeiserMazars LLP

Topics:
• The recently enacted new Final Regulations.
• Definitions of building improvements and repairs and maintenance.
• Factors determining routine maintenance.
• The new encompassing guidelines on what creates an improvement and creates a “BAR” (Betterment, Adapt, Restore) test.
• DeMinimis rule of expensing.

Course Level: Basic/Intermediate
Course Code: TBD
CPE Credits: 2

REAL ESTATE COMMITTEE
NASSAU CHAPTER
WEDNESDAY, DECEMBER 4, 2013

Milleridge Inn
585 Broadway
Jericho, NY 11753

MAIL TO:
Joel Dressner, CPA
c/o Gettry Marcus Stern & Lehrer, CPA, P.C.
20 Crossways Park North
Suite 304
Woodbury, NY 11797
Tel: (516) 364-3390 ext. 232
Fax: (516) 496-0417
Email: jdressner@gmslny.com

Dear Joel:

☐ I will attend for dinner and the CPE presentation at 6:00 PM and I have enclosed a check for $_______ at $45 per person, payable to NYSSCPA – Nassau Chapter

☐ I will attend the CPE presentation only at 7:00 PM and I have enclosed a check for $_______ at $20 per person, payable to NYSSCPA – Nassau Chapter

Name: _____________________________________________
Firm Affiliation:________________________________________
Address: ______________________________________________
City/State/Zip: __________________________________________
Phone: ________________________________________________
Cell: __________________________________________________
Email: ________________________________________________

To ensure we have adequate seating, please fax back or mail your reservation as soon as possible. Thank you.
THE TAXATION COMMITTEE PRESENTS
2013 ALL-DAY TAX CONFERENCE

December 7 or 8, 2013

Conference and Committee Chairpersons
Robert Barnett, Esq., CPA
Robert Schaffer, CPA
Iola Damante, CPA

Topics: Updates on federal and NYS tax legislation; Elder law; Estate planning; NYS residency; Gambling and gaming issues; Investing in and redemption of partnership interests

Speakers: Robert Katz, Esq.-Katz, Bernstein & Katz LLP
Mark Klein, CPA, Esq. and Debra Silverman Herman, Esq.
-Hodgson Russ LLP
Eric Kramer, CPA, Esq., and Jordan Linn, Esq.
-Farrell Fritz LLP
Karen Tenenbaum, CPA, Esq., Yvonne Cort, Esq., Christopher Bourell, Esq., and Bradley Polizzano, Esq.
-Karen J Tenenbaum PC
Robert Barnett, CPA, Esq., Stuart Schoefeld, Esq. and Elizabeth Forspan, Esq.
-Capel, Barnett, Matalon & Schoenfeld LLP

Representatives from IRS and NYS will also be available.

Participants will be able to order a copy of the 2014 Master Tax Guide.

Conference Coordinator and Organizer:
Lelia Dickenson, Foundation for Accounting Education

Time: 9:00 am –5:15 pm (check in begins at 8:30 am)
Location: Long Island Marriott, Uniondale, New York

Designed for: Professionals with basic knowledge of taxation

Objective:
To update participants on the impact of recent tax legislation and to provide practical application in tax compliance, planning and advisory services

Fee: $175-Members, $250-Nonmembers (lunch included)
CPE Credits: 8
Course Level: Beginner/Intermediate
Course Codes: 28603423 for Sat., 28603424 for Sun.

I am registering for □ 12/7 or □ 12/8
Are you a CPA? □
Are you a Member of the NYSSCPA? □
CPA Certificate No. __________
Are you a Member of the AICPA? □
Member ID No. __________
Are you a member of another CPA society? □

Name: ________________________________
Firm Affiliation: ________________________________
Address: ________________________________
City/State/Zip: ________________________________
Phone: ________________________________
Email: ________________________________

Total Amount Enclosed
Attendee: ________________________________
Member Fee ($175): ________________________________
Nonmember Fee ($250): ________________________________
Total Amount: $ ________________________________

Method of Payment

- Check Payable to FAE
- American Express □ MasterCard □ Visa
Credit Card No. ________________________________
Cardholder’s Name ________________________________
Exp. Date ________________________________

Walk-ins: All individuals who register on the date of the program will be charged an additional $25 fee.

Refunds: No refunds will be given for cancellations received less than 2 weeks before the program date. A $25 processing fee will be deducted for cancellations received more than 2 weeks before the program date.

Register online at www.nysscpa.org
or fax to (212) 719-3365, or phone (800) 537-3635

THE TAXATION COMMITTEE
PRESENTS
2013 ALL-DAY TAX CONFERENCE

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-Hodgson Russ LLP
Eric Kramer, CPA, Esq., and Jordan Linn, Esq.
-Farrell Fritz LLP
Karen Tenenbaum, CPA, Esq., Yvonne Cort, Esq., Christopher Bourell, Esq., and Bradley Polizzano, Esq.
-Karen J Tenenbaum PC
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Are you a member of another CPA society? □

Name: ________________________________
Firm Affiliation: ________________________________
Address: ________________________________
City/State/Zip: ________________________________
Phone: ________________________________
Email: ________________________________

Total Amount Enclosed
Attendee: ________________________________
Member Fee ($175): ________________________________
Nonmember Fee ($250): ________________________________
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- American Express □ MasterCard □ Visa
Credit Card No. ________________________________
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Register online at www.nysscpa.org
or fax to (212) 719-3365, or phone (800) 537-3635
December 20, 2013

Topic: Getting Ready for Tax Season
- Updates and Changes to Electronic Filing
- FBAR and CPA Responsibility
- Portals – Positives and Negatives
- Overtime/Bonus for Tax Season – Exempt & Non-Exempt Employees
- Use of Tax Organizer and Engagement Letters
- Scanning – Front-end and Back-end
- Workflow Management Software Solutions
- Top Issues and Challenges for CPAs 2011 to 2013

Moderated By: Scott Sanders, CPA, CFP, CGMA, CFS*, PFS
               Eliot Lebenhart, CPA
               Kenneth Hauptman, CPA
               Alex Resnick, CPA

CPE: Two Credits Pending

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

Place: On Parade Diner
       7980 Jericho Turnpike, Woodbury

Cost:* $25 per person, pre-paid only
$30 per person, at the door

Checks are Payable to: NYSSCPA - Nassau Chapter

Chairpersons:
Scott Sanders, CPA, CFP, CGMA, CFS*, PFS
Eliot Lebenhart, CPA
Kenneth Hauptman, CPA
Alex Resnick, 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 six months. There are no refunds.

Please note: Meetings are subject to change.
Notifications will be sent to all registered attendees via email should this occur.
Practice Continuity Committee

Practice Continuation Agreements

Friday, January 24, 2014

Mr. Alex Resnick, CPA, Partner with Wild, Maney & Resnick, CPA’s
Mr. Ken Gross, of PACE Professional Services
Thomas Maisero of Wilsner, Elser, Moskowitz, Edelman & Dicker LLP

Practice Continuity Committee

Practice Continuation Agreements

Friday, January 24, 2014 - On Parade Diner
7980 Jericho Turnpike Woodbury, NY 11797 • Phone: (516) 364-1870

Ginette Morris
Craig Morris & Company
356 South Oyster Bay Road, Syosset, NY 11791
Tel: (516) 681-1121
Fax: (516) 681-1203
E-mail: ginette@morriscpas.com

Dear Ginette:

☐ I will be attending the breakfast meeting at 8:00 AM.

☐ Enclosing is my check for $_______ at $20.00 per person (must be received by noon, Thursday, October 24) or;

☐ I prefer to pay $_______ at $25.00 per person at the door. (Walk-in's may be limited due space availability).

Checks are payable to NYSSCPA, Nassau Chapter.

Name:________________________________________________________________________________________

Firm Affiliation:_____________________________________________________________________________

Address:____________________________________________________________________________________

Phone:_______________________________________________________________________________________

Email:_______________________________________________________________________________________
NYSSCPA – NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE MEETING

January 29, 2014

Topic: Bank Financing for CPAs – Loan Rangers
Joint Meeting with NCCPAP

A joint NYSSCPA and NCCPAP roundtable discussion with various Metropolitan area banks (Signature Bank, Capital One, Flushing Bank, and more). The bankers will discuss with us what they are looking for in regard to Financial Statements and the accountant’s role in the banking process. The accountants will discuss our side on the issues and how we can mutually benefit each other.

Moderated By: Eliot Lebenthal, CPA
Robert Brown, CPA of NCCPAP

CPE: Two Credits Pending

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

Place: On Parade Diner
7980 Jericho Turnpike, Woodbury

Cost:* $25 per person, pre-paid only
$30 per person, at the door

Checks are Payable to: NYSSCPA - Nassau Chapter

Chairpersons:
Scott Sanders, CPA, CFP, CGMA, CFS*, PFS
Eliot Lebenthal, CPA
Kenneth Hauptman, CPA
Alex Resnick, 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 six months. There are no refunds.

Please note: Meetings are subject to change. Notifications will be sent to all registered attendees via email should this occur.

NYSSCPA – NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE MEETING

REGISTRATION:
January 29, 2014
On Parade Diner
7980 Jericho Turnpike
Woodbury, NY 11797

January 29, 2014
On Parade Diner
7980 Jericho Turnpike
Woodbury, NY 11797

Please pre-register by calling Jean at 516-938-5219 or you can email her at jtownsend@st-cpas.com or fax this page to 516 938-0491
Please mail your check to:
Scott Sanders, CPA, PFS, CGMA, CFP*, CFS
Sanders Thaler Viola & Katz, LLP
350 Jericho Turnpike, Suite 1
Jericho, New York 11753-1317

☐ I am enclosing a check for $______ at $25 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 Affiliation: ________________________________
Address: ________________________________
City/State/Zip: ________________________________
Phone: ________________________________
Cell: ________________________________
Email: ________________________________
CPA Cert #: ________________________________
Signature: ________________________________
Date: ________________________________

*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 six months. There are no refunds.
NYSSCPA Nassau / Suffolk Joint Chapter - Cooperation with Bankers and Other Credit Grantors Committee

Invites you to the
Annual Joint Nassau/Suffolk Chapter Meeting:

An Evening of Networking with Special Guest Speaker

John Lizzo, LIA Economist

Sponsored By: Capital One Bank and Ace Payroll

Thursday, January 30, 2014

Crest Hollow Country Club – Woodbury, NY

6:00 pm – 8:30 pm

Networking, Cocktails, Buffet Dinner

$60 in advance – cash or check $70 walk-in (not pre-registered)

RSVP REQUIRED by January 16, 2014

Open to all NYSSCPA members, bankers, and other professionals

Please attach a list of names/business cards if paying for more than one attendee:

Name: _____________________________________ Firm: ____________________

Address: ______________________________________________________________________________________

Phone: ___________________________ Email: __________________________________________

I am a: _______ CPA _______ Banker _______ Other _______

# of People attending ___________ Enclosed Amount $ ___________

Please make checks payable to: NYSSCPA Nassau Chapter

Mail to: Neal Korenberg, CPA

Questions: Phone (516) 937-9500

Castellano, Korenberg & Co., CPA’s, P.C.

Fax (516) 932-0485

313 W. Old Country Road, Hicksville, NY 11801

Email: cpinto@ck-co.com
UPCOMING MEETINGS

The NYSSCPA Nassau Chapter Young CPAs Committee along with the Risk Management Association, Young Professionals Committee invite you to a

Holiday Networking Event – for Charity!

Thursday, December 12, 2013
6:00 – 8:00 p.m.

Hosted at Jewel
400 Broad Hollow Rd
Melville, NY

$55 in advance | $60 at door

Come to this strictly social event to mingle with your peers and support the Ronald McDonald House Charities.

Please come and support families of sick children by donating food and household items. (See list on next page.)

Passed hors d’oeuvres! Beer & Wine!

NYSSCPA Contact: Joshua Sechter – (631) 719-3357, Joshua.Sechter@bakertilly.com
RMA Contact: Tiffany Lumsden – (516) 577-8371, Tiffany.Lumsden@wellsfargo.com

Name: _____________________________________________
Firm: ______________________________________________
Address: ___________________________________________
City, State, Zip: _____________________________________
Telephone: _________________________________________
E-mail: __________________________________________

RSVP to: RMALongIsland@gmail.com
Then, make checks payable to RMA – Long Island Chapter and mail to:
Michael Collins
Albrecht, Viggiano, Zureck
25 Suffolk Court, Hauppauge, NY 11788
Phone: (631) 434-9500
Fax: (631) 434-9518

To pay by credit card:
http://community.rmahq.org/longisland/Home/?ssopc=1

Sponsored by WELLS FARGO
Holiday Networking Event – for Charity!

Donation Ideas for
Family and House Needs

To help maintain integrity, please be sure that all items are new and in their original packaging.

Pantry
Cereal, Oatmeal, Rice, Snack Foods (Chips, Pretzels and Cookies — snack size/individual pre-packaged), Cooking Oil, Mayonnaise, Canned Fruit, Peanut Butter, Jelly, Tuna Fish, Chef Boyardee, Paper Towels, Napkins, Paper Plates and Plastic Silverware

Cleaning Supplies
Liquid Hand Soap, Disinfecting Spray, Laundry Soap, Soft Scrub (Cleaning Cleanser), Glass Cleaner, Furniture Polish, Lysol Wipes, Bathroom Cleaners and All-Purpose Spray

Linens
Shower Curtain Liners (white or clear), Standard Size Bed Pillows (solid white only), Standard Size Pillow Protectors (white only), Bath Mats (terry looped white only), Hand & Face Towels (solid white only)

Kitchen
Dish & Hand Towels, Automatic Dishwasher Liquid, Dishwashing Liquid, & Oven Cleaner, Aluminum Trays

Electrical Items
Vacuums, DVD Players, Hair Dryers, Irons, Alarm Clocks

Family Requests
New Infant Toys, Toiletries, Travel-Sized Soaps, Lotions, etc., Umbrellas

Gift Certificates and On-line Purchases
Waldbaums / Pathmark / Stop&Shop / PC Richards / Target / JCPenney (Cards in increments of $10, $15, $20 can be combined and used for purchasing major appliances and linens)
Nassau Chapter

Annual CPA Ethics Update

Wednesday January 15, 2014
Chateau Briand

440 Old Country Road, Carle Place, NY 11514
Cocktails: 5:30 p.m. (check-in begins at 5:00pm)
Dinner: 6:30 p.m.
CPE only: 6:45 p.m. (check-in begins at 6:30pm)

CPA Ethics Update: General Ethics

Objective: To provide knowledge of recent changes to the AICPA and the NYSSCPA Code of Professional Conduct and New York State law; to familiarize participants with ethics enforcement programs in place in New York; as well as to provide a general overview of ethics concepts, discuss common ethical dilemmas, and provide ethics resources for practitioners in all practice areas.

Please join us for this exciting event!

Please RSVP without delay in order to reserve your seat, using the coupon below.

NOTE: YOU MUST REGISTER TO ATTEND. Those not registered will not be allowed to attend the CPE presentation.

How to register online:
Please note: All registration (dinner and CPE) is being handled by the NYSSCPA. The Nassau Chapter will not be taking registration for this program.

You can register: online at www.nysscpa.org
by phone: 800-537-3635
or by mail with the coupon on this page.

To register for: Ethics CPA Update: General Ethics
Course Code: 42032415
Member: $10.00
Nonmember: $20.00

To register for cocktails and dinner and CPE session:
Course Code: 45030412
Member: $70.00
Nonmember: $80.00

For additional information, please contact Lelia Dickenson at:
lrickenson@nysscpa.org or 212-719-8366

COUPON
Mail to: Foundation for Accounting Education
P.O. Box 10490
Uniondale, NY 11555-0490

☐ 45030412- I will attend cocktails and dinner and CPE presentation at 5:30 p.m. (check-in begins at 5:00pm)
☐ 42032415-I will attend the CPE presentation only at 6:45 p.m. (check-in begins at 6:30pm)

Enclosed is my check for $_____________, payable to the Foundation for Accounting Education.

Name:______________________________________
Firm Affiliation:______________________________
Address:____________________________________
Telephone:__________________________________
Fax:________________________________________
E-mail:______________________________________
You’re Invited to Our
Family Financial Literacy Fair
Brought to you by the Financial Literacy Committee of the
NYS Society of CPAs, Nassau Chapter

**Saturday, May 3, 2014**
**10:00 am to 2:00 pm**
**at**
Commerce Plaza
YES Community Counseling Center
152 Center Lane
Levittown, NY 11756
516-342-9236

The fair will include lots of fun and exciting hands-on activities for kids and their families, as well as live entertainment.

For more information contact Karen Tenenbaum at 631-465-5000 or ktenenbaum@litaxattorney.com.

Sponsorships available.

Open to the Public.
Expand Your Knowledge — Join A Committee

Committee Service Application

Professional associations serve an important function of performing for its individual members projects that cannot be done as effectively, if at all, individually.

Nassau Chapter members have the opportunity to advance their knowledge and meet other professionals with similar interests. Our Chapter is made of many technical committees to assist our members in staying current on a wide variety of topics.

Use the coupon to join a committee today!

Committee Service Application

☐ Accounting & Auditing
☐ Attorneys & Accountants
☐ CFO & Financial Executives
☐ Community Affairs & Public Relations
☐ Cooperation with Bankers & Credit Grantors
☐ Cooperation with Educational Institutions
☐ Estate Planning & Personal Financial Planning
☐ Financial Literacy
☐ Litigation & Forensic Service
☐ Management of Accounting Practice
☐ Medical & Other Professionals
☐ Membership
☐ Newsletter
☐ Practice Continuity
☐ Real Estate
☐ Small Practice MAP
☐ Other ________________________________
☐ Sponsorship
☐ Taxation
☐ Technology
☐ Women’s Focus Group
☐ Young CPA

Name: _________________________________________________
Firm Affiliation: _________________________________________
Address: _______________________________________________
City/State/Zip: __________________________________________
Phone: ________________________________________________
Email: ________________________________________________

Please forward your response to:
Phil Kanyuk
Phone: 631-719-3456 • Fax: 631-719-3353
Baker Tilly
125 Baylis Road, Suite 300, Melville, NY 11747.

If you wish to sponsor any Nassau chapter or committee events, please download our sponsorship packet at

Mentor a Student Nite - October 17, 2013

On October 17th, the NYSSCPA Nassau Chapter held its “Mentor a Student Nite” at Chateau Briand. The event was attended by 80 students and 50 CPA’s. The students loved it and the night was a huge success. Log into our facebook page to see the album with all the photos of the event.
Attendees at the Small Firm Map Meeting held October 18th. John Zaher and Aimee Dineiro of PRMG spoke about use of websites, social media, advertising, and other topics related to optimizing client communications.
On Saturday October 26, 2013 the Taxation Committee held its annual half-day conference.

We invited five outstanding speakers who are all experienced and accomplished experts in various tax areas. Each year Jack Angel, CPA and professor invites students from his Adelphi University class as our guests so they can get acclimated to the accounting profession. We all appreciate their participation.

The conference was a success thanks to our extraordinary speakers and our attentive attendees who always ask insightful questions that all the participants benefit from.
In business since 1994, ACE Payroll assists thousands of companies nationwide with all their payroll, time and attendance, and HR needs. ACE offers:

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For more information, please contact 1-800-856-0700 or info@acepayroll.com.
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Advertising Opportunities

If you wish to advertise in the NYSSCPA Nassau Chapter Newsletter promoting your business or self, please contact:

Vivian Levy

e-mail: VivianLevy1@gmail.com
INFORMATION AND HOTLINES

Have a Tax Problem?
The following members of the Taxation Committee are available to help answer your questions:

General:
- Robert S. Barnett, CPA, Esq., MS (taxation) (516) 931-8100
- Jack Angel, CPA (516) 487-1494
- Robert Lusthaus, CPA, Esq. (516) 937-1366
- Karen J. Tenenbaum, Esq. LLM (Tax), CPA (IRS & NYS) (631) 465-5000
- Robert J. Schaffer, CPA (516) 937-9500

Taxing Authorities
- Ruth Sattig Betz, CPA (NYS) (516) 249-1919
- Noelle T. Geiger, Esq. (IRS & NYS) (516) 336-2447
- Yvonne Cort, Esq. (IRS & NYS) (631) 465-5000
- Brian Gordon, CPA (NYS) (516) 510-6041

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
- Fred R. Goldstein, CPA (516) 249-2882

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
- Scott Sanders, CPA, PFS, CGMA, CFP, CFS (516) 938-5219

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www.theprmg.com

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Nassau Chapter Newsletter Deadlines
All submissions are due three weeks prior to issue date.
Email submissions to: nassaunewsletter@nysscpa.org

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The newsletter is downloadable at: www.nysscpa.org

CHANGE FORM

CPA Certificate #: ___________

Name (Last, First, Middle Initial): _____________________________

Address: ___________________________________________________

City/State/Zip: __________________________

Home Phone: ___________________________

Email: ___________________________

Firm Name: ___________________________

Firm Address: _____________________________________________

City/State/Zip: ___________________________

Business Phone: _______________________

Chapter Member:  □ Yes  □ No

Please send all mail to: □ Firm  □ Home (Specify Chapter) __________________________

□ I would like to receive an email with a direct link to the newsletter on nysscpa.org

Return this form to:
Xio Fox, NYSSCPA, 14 Wall Street, New York, NY 10005

www.nysscpa.org