A Message from the President

With summer coming to an end and fall quickly approaching, it’s hard to believe that almost three months have passed since the Installation Dinner. I would like to take this opportunity to thank everyone who attended, sponsored, supported, and/or worked tirelessly to make *A Bridge From Academia to Practice* the spectacular night it was, where the profession and education celebrated together. I want to especially thank my predecessor Lynne Fuentes and Vivian Levy for their generosity and patience in helping me organize the event, and Neil Katz, the best emcee around.

As the 64th President of the Nassau Chapter, I look forward to working with the committees, Board of Directors, and Executive Committee for a busy and productive year. We are also working much more closely with the Suffolk Chapter than ever before to plan joint events, provide assistance to struggling committees and to create a new vision for the Long Island Accounting community. Thank you to the Suffolk Chapter President, Amanda Sexton for helping me to move our chapters closer together. On September 19, the Litigation & Forensic Service Committee will hold a joint meeting with the Suffolk Chapter counterpart at the offices of Nawrocki Smith in Melville. The Networking with Accountants Committee will host a joint breakfast networking event with the Suffolk Chapter on October 18, and on November 10, the Accountant & Auditing Committee will hold a joint A & A update with the Suffolk Chapter at the Radisson Hotel in Brentwood. Additional details can be found on page 3, and on the Chapter’s website, LinkedIn, and Facebook pages.

I’d like to thank Scott Sanders and Lisa Haynie for serving as the President’s Advisory Committee. I am happy and honored that they will be guiding me as the Chapter makes positive changes.

We started the Chapter year on June 17 with the *Annual Ellen Gordon CPAs 4(a): Cause 5K Run/Walk to End Hunger* at Eisenhower Park. I would like to recognize and thank our partners in this event and good friends, the National Conference of CPA Practitioners (NCCPAP). 100% of the net profits go to Island Harvest, the largest hunger relief organization on Long Island. This year we collected over $6,000 to go to Island Harvest. Thank you to Ken Rick for his continued leadership in such an important annual event for the chapter.

The Career Opportunities in the Accounting Profession (COAP) program hosted a five-day event for students at Adelphi University that started on June 24 and culminated in a banquet on June 28. The keynote speaker was none other than our Past President Lynne Fuentes, who inspired the crowd with a great family story about overcoming adversity. This year, our program included several diverse events, from business technology to business communication and etiquette.

In August there were two golf events for the Chapter. Our Networking with Accountants Annual Golf Outing was held on August 17 at North Hills Country Club. We had a beautiful day on the course and the banquet afterward was unparalleled, as usual. It was a great day of networking and golf. Thank you to Neal Korenberg, Carol Pinto and their firm for always putting together a great outing for the Chapter. On August 22, our Next Gen Committee held their inaugural Golf Workshop Networking Event at Harbor Links Golf Course. It was well attended, especially for an inaugural event and looks to be an event to look forward to for many summers to come. Thank you to co-chairs Wei Xu, Jean David Chery, Garrick Turano and Alyssa Popov for taking the initiative and for running such a great event.

On July 8, many of our chapter members as well as Suffolk Chapter members supported the Blood Drive that our friends at NCCPAP organized in the memory and in Honor of Susan Gallo. It was a beautiful day and the event collected over 50 pints of much needed blood. Thank you to all who came and gave blood, support or helped in any small way, it was very much appreciated.

*(Continued on next page.)*
A Message from the President (continued)

At the Installation Dinner and in the spirit of “building a bridge to academia,” I announced that the Robert Katz Endowment in Accounting, Taxation and Legal Studies will be established in perpetuity in memory of the significant contributions that Bob Katz made to Hofstra University, the fields of accounting/taxation and the tremendous reputation he had established in the Long Island Accounting community. Bob was a Distinguished Professor at Hofstra University, an Honorary Alumnus and an outstanding business and community leader. Bob Katz was my mentor, my colleague, my co-worker, but much more importantly he was my friend. There are so many accountants in the Long Island community that owe their careers or a good chunk of what they know to Bob Katz and this is a way to give back in Bob’s name. Please consider supporting this endowment and help us keep Bob’s legacy alive at Hofstra. The information appears on the pledge card on page 17 of the newsletter. Checks can be made payable to Hofstra University – memo line Katz Endowment or online at: [www.hofstra.edu/katzendowment](http://www.hofstra.edu/katzendowment) (Please check with your employer about your company’s matching gift policy.) During my Presidency I will be reminding you in each President’s message to help get the word out to support this effort.

I am looking forward to a great year of cooperation with other Chapters and other professional organizations, continued collegiality with the greatest chapter members in the State Society and a slate of officers and directors who welcome innovation, new programs and ideas. We are looking to improve on what we do for greater involvement by members. Please feel free to email me at abasile@basilecpa.com with any thoughts or suggestions you have for improving our chapter and I will bring the suggestions to our Board directly for consideration.

Thank you for the honor of being your President.

Sincerely,

[Signature]

Anthony Basile Ph.D., CPA, CVA, CFE
President
Nassau Chapter
Table of Contents:
Message from the President ........................................... 1-2
Newsletter Overview & Useful Information ................................. 3
In the News ........................................................................ 4
Upcoming Meetings and Events .................................................... 5-17
Event Highlights ................................................................... 18-27
Calendar of Events ................................................................ 28-31
Board & Committee Chairs ....................................................... 32-34
Committee Application ............................................................ 35
Information and Hotlines ......................................................... 36
Newsletter Deadlines .............................................................. 36
Change Form ........................................................................ 36

Chapter Officials:

PRESIDENT
Anthony Basile, CPA

PRESIDENT ELECT
Alex Resnick, CPA

VICE PRESIDENT
Natalie Verbanac, CPA

TREASURER
Geri Gregor, CPA

SECRETARY
Vivian Martinez, CPA

DIRECTOR (PAST PRESIDENT)
Lynne M. Fuentes, CPA

DIRECTORS
Mark R. Cuccia, CPA
Kristina Albarella, CPA
Iola Damante, CPA
Jarred R. Bernard, CPA
Kenneth Rick, CPA
Nannette Watts, CPA
Kenneth Hauptman, CPA
Wei Xu, CPA

ACCOUNTING & AUDITING
Mark R. Cuccia, CPA
Tina M. Romano, CPA
Franco Martorana, CPA

ATTORNEY & ACCOUNTANTS
Kristina Albarella, CPA
Anthony Basile, CPA

CFO & FINANCIAL EXECUTIVES
Anthony Aronica, CPA

PRACTICE CONTINUITY & SUCCESSION PLANNING COMMITTEE
Larry Bloom, CPA
Eliot Lebehart, CPA
Craig R. Morris, CPA

REAL ESTATE COMMITTEE
Vivian Martinez, CPA
Jodi Bloom-Picone, CPA
Deana Wetzel, CPA

SMALL PRACTICE UNIT MAP
Kenneth Hauptman, CPA
Eliot Lebehart, CPA
Alex Resnick, CPA

PRESIDENT'S ADVISORY COMMITTEE
Scott Sanders, CPA
Lisa Haynie, CPA

PRESIDENTS'S COMMITTEE
Anthony Basile, CPA

EMPLOYEE BENEFITS
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Tina M. Isbitsky, CPA

Estate & Personal Financial Planning
Pamela Diamond, CPA
Christine P. Hallahan, CPA
Eric M. Kramer, CPA, Esq.
Stuart R. Shapiro, CPA
Scott Sanders, CPA

FINANCIAL LITERACY
Lawrence M. Just, CPA

LITIGATION & FORENSIC SERVICES
Pasquale Rafanelli, CPA

MANAGEMENT OF ACCOUNTING PRACTICES
Louis Grassi, CPA

MEMBERSHIP
Scott Sanders, CPA

NETWORKING WITH ACCOUNTANTS
Neal Korenberg, CPA

NEWSLETTER
Natalie Verbanac, CPA
Lynne M. Fuentes, CPA

NEXT GEN COMMITTEE
Wei Xu, CPA
Jean David Chery, CPA
Garrick Turano, CPA
Alyssa Popov, CPA

NEXT GEN LIASON
Lynne M. Fuentes, CPA

COOPERATION WITH ATTORNEY & ACCOUNTANTS

COMMUNITY AFFAIRS & PUBLIC RELATIONS
Kenneth Rick, CPA

next gen committee

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COOPERATION WITH ATTORNE
The New York State Department of Taxation and Finance ("DTF") is entering the 21st century with improved online offerings for both taxpayers and tax professionals. On June 27, 2017 the DTF released a new and greatly simplified Power of Attorney form, which may be filed online as well as on paper. The new form, reduced to one page from four, eliminates the requirement of notarization and requires only the taxpayer’s signature, not those of the representatives. Furthermore, the new form, when filed, only revokes existing powers when explicitly indicated, a change that should ease the process of adding additional representatives on to an existing power. However, the transition to the new form does involve some complications of which practitioners should be aware.

The foremost issue is that of cross compatibility with the NYC Department of Finance. The State and City have traditionally used the same form for Powers of Attorney and both continue to accept the older, four-page version (although DTF will not accept the old form for e-filing). The new version, however, cannot yet be used for NYC matters, pending the adoption of a proposed rule change currently being considered by the City Department of Finance.

The Proposed Rule faces no apparent barriers to adoption (the required comment period ended on July 17, 2017 without a single filing), but until it is finalized, the existing form, together with the notarization requirement and the presumption of revocation, remains the only option. However, there is a silver lining; the rule change also gives the City Department of Finance authorization to designate alternate methods of filing Powers of Attorney, suggesting that e-filing may eventually come to the city as well.

New York State has introduced other online offerings as well. Launched in March, the Quick Pay service allows individuals to pay their tax bills on DTF’s website without the need for the creation of an Online Services (OLS) account. All that is required is some verifying information from a return filed in the last four years (i.e. name, SSN, zip code, and filing status) and the taxpayer’s bank account details. OLS accounts are still required for businesses and those whom would prefer to pay via credit or debit card.

Within the Online Services system, the DTF has also added a self-service option for setting up Installment Payment Agreements (IPA) for taxpayers meeting certain criteria. To qualify, one must be current with tax filings and must not have previous IPA defaults, open collection or protest cases, or current bankruptcy proceedings. Self-service IPAs are also limited to tax liabilities of less than $20,000 and repayment terms of less than 36 months. The DTF estimates that, even with these limitations, almost one-third of IPAs set up through state agents would be eligible for self-service.

Charles Finocchiaro, Esq., LL.M. (Taxation) and Karen Tenenbaum, Esq., LL.M. (Taxation), CPA are tax attorneys concentrating in tax dispute resolution with the Melville, New York firm of Tenenbaum Law, P.C.

Charles can be reached at cfino@litaxattorney.com or (631) 465-5000
and
Karen at ktenenbaum@litaxattorney.com or (631) 465-5000.
THE NASSAU CHAPTER FINANCIAL LITERACY COMMITTEE PRESENTS

Form of Flow Through Entity Taxation of Partnership, Limited Liability Company, Sub S Corp.

A Conversation with LAWRENCE LUCARELLI, CPA

Tuesday, September 19, 2017

Chairperson: Lawrence Just, CPA

Location: Café 58
58 South Service Road
Melville, NY 11747

Time: 8:00 - 9:00 AM

Course Code: TBD

CPE Credits: 1

Cost: NO FEE

*Please call Larry Just (631) 428-4829 or Nannette Watts (516) 506-8224 to RSVP
The Nassau Chapter Litigation Committee jointly with the Suffolk Chapter present

Cybersecurity – Data Privacy & Protection

Tuesday, September 19, 2017

SPEAKERS:
Jack Harrington, Esq., Middleton & McCormick, LLP
Kevin Edwards, Flexible Systems

Chairperson: Pasquale Rafanelli, CPA/ABV, ASA, CVA, CBA, CFE, MAFF, CDFA
Location: Nawrocki Smith, 290 Broadhollow Rd, Melville

Time: 8:00 – 10:00 AM
Course Code: 29035807
CPE Credits: 2

Cost: $20 *Students attend free of charge*
A TECHNICAL MEETING SPONSORED BY THE REAL ESTATE COMMITTEE

Real Estate Professionals and Passive Activity Losses for Real Estate Investors

THURSDAY, SEPTEMBER 21, 2017 from 6:00 PM – 8:00 PM

Chairpersons: Vivian Martinez, CPA
                Deana Wetzel, CPA
                Jodi Bloom, CPA

Location: Marks Paneth LLP
          88 Froehlich Farm Blvd. (Lower Level - Room LL 4)
          Woodbury, NY 11797
          (516) 992-5900

Designed for: Professionals involved in real estate engagements.

Speaker: Robert Barnett
          Capell, Barnett, Matalon & Schoenfeld LLP

Course Level: Basic/Intermediate

Course Code: TBD

CPE Credits: 2

REAL ESTATE COMMITTEE
NASSAU CHAPTER

THURSDAY, SEPTEMBER 21, 2017
Marks Paneth LLP
88 Froehlich Farm Blvd. (Lower Level - Room LL 4)
Woodbury, NY 11797

MAIL TO:
Deana Wetzel, CPA
c/o Marks Paneth LLP
88 Froehlich Farm Blvd., 2nd Floor
Woodbury, NY 11797
Tel: (516) 992-5746
Fax: (516) 992-5747
Email: dwetzel@markspaneth.com

Dear Deana:
I will attend the CPE presentation at 6:00 PM.
Includes sandwiches and refreshments. I have enclosed a check for $__________ at $25.00 per person, payable to the NYSSCPA–Nassau Chapter.
(Please attach a list of names or attach business cards if paying for more than one attendee.)

Name:
Firm Affiliation:
Email:
Address:
Telephone:

To ensure we have adequate seating, please fax back or mail your reservation as soon as possible.
Thank you.
UPCOMING MEETINGS AND EVENTS

NYSSCPA - NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE MEETING

Thursday, September 28, 2017

Topic:
Attorneys and You: Working Together for Your Clients

Speaker: Yvonne Cort, Esq., Capell, Barnett, Matalon & Schoenfeld

CPE: 2 Credits Pending

Time: 8:00 – 10:00 AM (Be prompt!)

Place: On Parade Diner
7980 Jericho Turnpike, Woodbury

Cost:* $25 per person paid in advance
$30 per person (includes pre-registered) paying at the door
Checks are payable to: NYSSCPA - Nassau Chapter

Chairpersons:
Alex Resnick, CPA
Eliot Leohenhart, 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 email should this occur.

NYSSCPA - NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE

Thursday, September 28, 2017

On Parade Diner
7980 Jericho Turnpike, Woodbury, NY 11797

Please pre-register by calling Shannon at (516) 364-8888 ext. 900, e-mail her at svolkerts@wmrcpa.com or fax this page to (516) 364-3717.

Please mail your check to:
Alex Resnick
Wild, Maney & Resnick, LLP
185 Froehlich Farm Blvd.
Woodbury, NY 11797

☐ 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 (print):
Firm:
Address:
Telephone:
Facsimile:
Cell:
Email:
CPA Cert #

Signature
Date
The Nassau Chapter Litigation Committee presents

Valuation and Forensics Panel

Wednesday, October 11, 2017

TOPICS:
Panel discussion on what you need to know to begin a career in the forensic and valuation field of accounting.

Chairperson: Pasquale Rafanelli, CPA/ABV, ASA, CVA, CBA, CFE, MAFF, CDFA


Panelists: Phil Kanyuk, CPA/CFF/ABV, ASA – Nussbaum Yates Berg Klein & Wolpow
John Spatola, CPA/ABV/CFF, CVA, CFE – Nawrocki Smith
Timothy Heck, CPA

Location: Grassi & Co. (Training Room) – 50 Jericho Quadrangle, Jericho, NY 11566

Time: 6:00 – 8:00 PM Panel Discussion
8:00 – 9:00 PM Networking

Course Code: TBD

CPE Credits: 2

Cost: $20 *Students attend free of charge*

Light refreshments will be served.
Networking with Accountants...

Join the Suffolk and Nassau Chapters for breakfast!

SAVE THE DATE!

Fall 2017 Banker/CPA Networking Event

Wednesday, October 18, 2017
8 to 10 a.m.

Save the date for our semi-annual networking event between the Nassau Chapter Networking with Accountants Committee and the Suffolk Chapter Cooperation with Bankers Committee!

More details to come...

For information:
Carol Pinto, (516) 937-9500, cpinto@ck-co.com
The CFO & Financial Executives Committee welcomes CPAs in industry to participate in our monthly meetings. The CFO Committee organizes monthly, interactive learning experiences guided by professionals of multiple disciplines. Our committee provides a confidential forum for industry CPAs at a senior level to seek advice, exchange guidance with fellow professionals, and develop a resourceful peer group.

Education topics are selected in advance by a group of active committee members. Prior to each seminar the committee allocates time for a “roundtable” discussion. **Prospective members should be a CFO, VP Finance or the most senior financial person at their company.**

The CFO Committee meets monthly from September through May. Meetings are held at 8:00 AM at Deloitte’s office in Jericho. We plan two dates with the Suffolk Chapter which will be held in Melville.

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Location</th>
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<tbody>
<tr>
<td>09/18/17</td>
<td>Revenue Recognition</td>
<td>Jericho / Deloitte</td>
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<tr>
<td>10/18/17</td>
<td>GAAP and Lease Update</td>
<td>Jericho / Deloitte</td>
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<td>11/15/17</td>
<td>Service Org. Controls (SOC) Audits</td>
<td>Melville / Wells Fargo</td>
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<tr>
<td>12/14/17</td>
<td>Economic Update</td>
<td>Jericho / Deloitte</td>
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**Dates for the following seminars will follow in the next newsletter:**

- Tax Update
- Trusts & Estates
- Private Equity & CFOs

**Meeting time & format:** 8:00 AM to 10:00 AM (2 CPE credits) – light breakfast served, $10 meeting fee

**Meeting locations:** Jericho / Deloitte - 2 Jericho Plaza, Jericho

Melville / Wells Fargo – 58 South Service Road, Melville (Nov 2017)

**Committee Co-Chairs:**

- Joanne Krush, CPA, CFO  
  SterlingRisk  
  jkrush@sterlingrisk.com  
  (516) 773-8605
- Anthony Aronica, CPA, CFO  
  Albert Kemperle, Inc.  
  anthony.aronica@kemperle.com  
  (631) 608-6203

*Please contact Anthony Aronica or Joanne Krush if you’d like more information.*
UPCOMING MEETINGS AND EVENTS

NYSSCPA – NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE MEETING

October 20, 2017

Cybersecurity in Today’s World

Hear from marketing and public relations professionals on how to utilize social media, newsletters and building your own website to effectively market your practice and hear from a practitioner who uses these same professionals to improve her firm’s brand and awareness.

Speakers: TBD
CPE: 2 Credits Pending
Time: 8:00 – 10:00 AM (Be prompt!)
Place: On Parade Diner,
7980 Jericho Turnpike, Woodbury
Cost:* $25 per person paid in advance
$30 per person (includes pre-registered)
paying at the door
Checks are Payable to:
NYSSCPA - Nassau Chapter

Chairpersons: Alex Resnick, CPA
Eliot Lebenhart, CPA
Kenneth Hauptman, CPA

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NYSSCPA – NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE

October 20, 2017

On Parade Diner
7980 Jericho Turnpike, Woodbury, NY 11797

Please pre-register by calling Shannon at (516) 364-8888 ext. 900, e-mail her at svolkerts@wmrcpa.com or fax this page to (516) 364-3717.

Please mail your check to:
Alex Resnick
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Woodbury, NY  11797

☐ 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.

Member #: ____________________________
Name (print): __________________________
Firm: _________________________________
Address: ______________________________
Telephone: ____________________________
Facsimile: _____________________________
Cell: _________________________________
Email: _______________________________ CPA Cert # _____________________________
Signature _____________________________
Date _________________________________
UPCOMING MEETINGS AND EVENTS

Nassau Chapter Practice Continuity Committee

On July 28, 2017, the Nassau Chapter Continuity of Practice Committee held its first breakfast meeting of the new Chapter year. Our meeting covered planning for our 2017-18 meetings along with the topic “Key Succession Planning Elements to a Partnership Agreement.” The agenda was covered by attorney Neil Katz who has drafted many CPA firm agreements, along with Larry Bloom, CPA, Craig Morris, CPA, and thoughts from Eliot Lebenhart, CPA. We discussed the perspective of a CPA entering a partnership for succession and matters he or she should be concerned about in their partnership agreement, including:

- admission of new partners;
- buy-outs and retirement of owners;
- restrictions on competition from former owners;
- compensation of owners, death and disability of owners;
- governance of day-to-day operations;
- major decisions, such as mergers with other firms, terminations of partners, and breaking up the firm;
- It was strongly emphasized that without an agreement, these matters are in the hands of courts and lawyers.

In planning the 2017-2018 year, we set our future meeting schedule, as follows:

- **October 27, 2017** – the topic planned is “The Vital Role of Marketing in Succession Planning,” with guest speaker Edie Reinhardt, a Principal of RDT Content Marketing LLC, a marketing consulting firm specializing in helping professional services firms. The agenda is expected to include:
  - why marketing should be a part of the planning discussions early in the process;
  - the steps needed and talent required to make any transition as smooth as possible to all your internal and external audiences;
  - changes in the accounting profession of the near future, including changes in options for succession, how firms will operate and transition with GenX and Millennials and importance and retention of female staff, and;
  - why marketing and business development is important to firm leadership.

- **January 26, 2018** – Daniel G. Mazzola, CFA, CPA will speak on “The Roll of Social Security in a CPA’s Retirement Plan.” While most of our CPA participants are financially astute, it seems many are not familiar with the intricacies of Social Security. After attending Dan’s presentation for the Nassau Chapter’s Tax Committee in November I was amazed at how much there is to know. He will surely educate our audience and help us plan to maximize Social Security as part of our succession strategy.

- **April 27, 2018** – is our final meeting of the Chapter year, with a topic to be announced later.

Please remember to schedule our events in your calendar now, to avoid conflicts. Our meetings are generally held at On-Parade Diner, the last Friday of the meeting month, though dates and locations are subject to change. A coupon for the October meeting is included in this newsletter. For more information, on this meeting or our Committee, contact us at ginette@morriscpas.com. We look forward to your participation.

_Craig Morris, Chairman_
UPCOMING MEETINGS AND EVENTS

SAVE THE DATE

3rd Annual Financial Fitness Day

Saturday, October 28, 2017
Freeport Library
10:00 AM to 2:00 PM

Co-sponsored by The Financial Literacy Committee of the NYSSCPA Nassau Chapter and The Financial Planning Association of LI

For more information contact
Larry Just
lmjust@earthlink.net
(631) 428-4829
## Accountant & Auditing Committee
### Fall 2017 Calendar

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Topic</th>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>9/19/2017</td>
<td>6:00 – 6:30 PM - Dinner 6:30 – 8:00 PM- CPE</td>
<td>Cybersecurity</td>
<td>Marks Paneth LLP</td>
</tr>
<tr>
<td>10/24/2017</td>
<td>6:00 – 6:30 PM - Dinner 6:30 – 8:00 PM- CPE</td>
<td>Deferred Taxes/TBD</td>
<td>Marks Paneth LLP</td>
</tr>
<tr>
<td>11/10/2017</td>
<td>FULL DAY 9:00 am – 5:00 PM</td>
<td>Joint A &amp; A Update with Suffolk Chapter</td>
<td>Radisson Hotel *</td>
</tr>
<tr>
<td>12/12/2017</td>
<td>6:00 – 6:30 PM - Dinner 6:30 – 8:00 PM - CPE</td>
<td>A &amp; A Update</td>
<td>Marks Paneth LLP</td>
</tr>
</tbody>
</table>

All meetings held at Marks Paneth LLP, Training Room (Lower Level), 88 Froehlich Farm Blvd, Woodbury, NY unless otherwise noted.

* 11/10/17 Event will be held at the Radisson Hotel, 110 Vanderbilt Motor Parkway, Brentwood, NY 11717
Practice Continuity Committee

The Vital Role of Marketing in Succession Planning

Friday, October 27, 2017, 8:00 AM

On Parade Diner, Woodbury, NY
7980 Jericho Turnpike, Woodbury New York, 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
Email: ginette@morriscpas.com

Dear Ginette:

_____ I will be attending the breakfast meeting at 8:00 AM.
_____ Enclosed is my check for $ ____ at $25.00 per person (must be received by noon, Thursday, October 26).
_____ I prefer to pay $ ____ at $30.00 per person at the door. (Walk-ins may be limited due to space availability).

Checks are payable to NYSSCPA, Nassau Chapter.

Note: Please RSVP by phone, fax or email as early as possible.
The Robert Katz Endowment at Hofstra University

The Robert Katz Endowment in Accounting, Taxation and Legal Studies will be established in perpetuity in memory of the significant contributions that Professor Katz has made to Hofstra University, the fields of accounting/taxation and the tremendous reputation he has established. Professor Katz was a Distinguished Professor at Hofstra University, Honorary Alumnus, Teacher of the Year, and an outstanding business and community leader.

Please consider supporting this endowment and help us keep Bob’s legacy alive at Hofstra University.

NAME
ADDRESS
EMAIL
PHONE
EMPLOYER
TITLE

I PLEDGE: $100 $250 $500 $1000 Other $

to support the Robert Katz Endowment in Accounting, Taxation and Legal Studies at Hofstra University.

(Checks can be made payable to Hofstra University – memo line Katz Endowment)

Contributions can also be made online at: www.hofstra.edu/katzendowment

PLEASE CHECK WITH YOUR EMPLOYER ABOUT YOUR COMPANY’S MATCHING GIFT POLICY.

SAVE THE DATE

January 11, 2018, 6:00 – 8:00 PM

Location – TBD

Come de-stress after the holidays and kick off the new year with the Women’s Focus Group.
64th Annual NYSSCPA — Nassau Chapter Installation Dinner

On May 31, 2017, the NYSSCPA Nassau Chapter held its 64th Annual Installation Dinner at the Crest Hollow Country Club where Dr. Anthony Basile was installed as the Nassau Chapter president. The theme of the evening was *A Bridge from Academia to Practice*. As part of the evening, Dr. Basile kicked off fundraising for The Robert Katz Endowment in Accounting, Taxation and Legal Studies which will be established at Hofstra University in memory of Professor Katz, who was also a very valued member of our chapter. The weather was great, the dinner was well-attended, and a wonderful time was had by all who attended.

RIGHT:
The Nassau Chapter 2017-2018 officers: President-Elect Alex Resnick, Treasurer Geri Gregor, President Anthony Basile, Vice President Natalie Verbanac, Secretary Vivian Martinez

The 2017-2018 Executive Board:
Lynne Fuentes, Iola Damante, Geri Gregor, Wei Xu, Alex Resnick, Anthony Basile, Nannette Watts, Vivian Martinez, Natalie Verbanac, Mark Cuccia, Kristina Albarella, Kenneth Rick, Jarred Berman
64th Annual NYSSCPA – Nassau Chapter Installation Dinner

Outgoing President Lynne Fuentes and President Anthony Basile pose for the camera.

Outgoing President Lynne Fuentes with incoming board member Kristina Albarella.

President Anthony Basile with his beautiful daughters.

MC Neil Katz presents the Samuel B. Traum Achievement Award to Andrea Elder-Howell, Esq. of PSEG.
64th Annual NYSSCPA – Nassau Chapter Installation Dinner

Neil Katz presents a check for the Moynihan Fund to NYSSCPA Executive Director Joanne Barry & President Michael Zovistoski.

Neil Katz presents the Distinguished Service Award to former chapter president Robert S. Barnett, CPA, Esq.

The 2017-2018 Board is sworn in by Past President Scott Sanders.
64th Annual NYSSCPA – Nassau Chapter Installation Dinner

ABOVE: Past President Lisa Haynie swears in President Anthony Basile.

RIGHT: Newly installed President Anthony Basile presents Lynne Fuentes with the Past President Plaque.

Nassau & Suffolk Chapter Meeting to Invigorate NextGen and Higher Education Efforts & Plan Joint Networking Events
64th Installation Dinner Sponsors & Advertisers

We want to give a special thank you to all of our sponsors and advertisers. You helped make the evening a resounding success.

~ GOLD ~
Anthony Basile CPA, P.C.
Capell Barnett Matalon & Schoenfeld LLP
Fuentes & Angel CPAs, LLC
Hofstra University - Frank G. Zarb School of Business
Hofstra University - Dept. of Accounting, Taxation and Legal Studies in Business at Frank G. Zarb School of Business
Katz, Smith & Chwat, P.C.
Nussbaum Yates Berg Klein & Wolpow, LLP
TMC Group of Companies
Wild, Maney & Resnick, LLP

~ SILVER ~
Ann Basile and Family
Citi Commercial Bank
Louis Basile, CPA, MBA
Marcum LLP
Marks Paneth LLP
Mary M. Zingalli, CPA & The Wolf Law Group, P.C.
Nassau/Suffolk Chapter of NCCPAP
Sanders Thaler Viola & Katz, LLP
Star Industries

~ BRONZE ~
Ace Payroll Services Inc.
ADP
EisnerAmper LLP
Janover LLC
PareShah Financial Services
PSEG Long Island
Sketchers USA
The Empire Group at UBS Financial Services Inc.
The Harmony Bar & Grill

~ GIFT SPONSORS ~
Advantage Payroll Services
Annabel Bazante Law, PLLC
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Nannette Watts, CPA, PC
Roger CPA Review
The Shapiro Financial Planning Group
Tenenbaum Law, P.C.
The Toli Center East

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Christine P. Hallahan, CPA
David J. Sobel, Esq.
Suffolk Federal
The Whole Person Project
Staff at Anthony Basile CPA, P.C.
Cara Consulting
Peter J. Tomao, Attorney-at-Law
John M Pascale - Ameriprise Financial
Suzanne Bazilicato, CPA - CondeBoyce, LLP
Bennett H. Berman - UBS
Suzanne Bazilicato, CPA - Hofstra University
Mark L. Stone, CPA, MST - Sales Tax Defense, LLC
Jim Musumeci
Practice Continuity Committee discusses Key Succession Planning Elements to a Partnership Agreement
NextGen Supersized Networking Event

The Nassau Suffolk joint chapter Next Gen Supersized Networking Event was held on August 9, 2017. We had a very good turnout, and everyone had a wonderful time.
NextGen Supersized Networking Event
125 students participated in the 2nd annual speech competition held by the Hofstra NYSSCPA chapter and the Zarb Accounting Graduate Association held at Hofstra. We would like to congratulate the first place winners: **Undergraduate 1st Place**: Michael Valentino (Theater), **Graduate 1st Place**: Nicole Burke (Piece of the American Pie). Honorable Mentions went to: **Undergraduate**: Milin Huang and Kaila Cerbone & **Graduate**: Li Sun and Zunyun (Alan) Zheng.
Financial Literacy Committee

The financial literacy committee has met every month throughout the summer, and has had some very interesting speakers.

May Financial Literacy Meeting: (L-R) Joe DonAngelo, Mario Pezzina, Nannette Watts, Phil Theiss, Larry Just, Leslie Tayne

Andrew Thaler - speaker at July Financial Literacy Meeting

Christina Yaccarino - speaker at June Financial Literacy Meeting

August Financial Literacy Meeting Scott Kestenbaum, Richard Kestenbaum (speaker), & Larry Just
# Calendar of Events

## Chapter Meetings

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<tr>
<td></td>
<td></td>
<td>Thursday 11/2</td>
<td>Student CPA Fest</td>
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<td>Chateau Briand, Carle Place</td>
<td>2:30 PM – 8:30 PM</td>
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<tr>
<th>Feb 2018</th>
<th>March 2018</th>
<th>April 2018</th>
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<tr>
<td>Wednesday 5/30</td>
<td>65th Annual Installation Dinner</td>
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<tr>
<td>Crest Hollow Country Club, Woodbury</td>
<td>6:30 – 11:00 PM</td>
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## Accounting & Auditing

Mark Cuccia, Tina Romano, Franco Martorana

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<tr>
<td>Tuesday 9/19</td>
<td>Cybersecurity</td>
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<tr>
<td>Marks Paneth, Woodbury</td>
<td>6:00 – 6:30 PM Dinner</td>
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<td>6:30 – 8:00 PM CPE</td>
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| Wednesday 10/24 | Deferred Taxes / TBD  |
| Marks Paneth, Woodbury | 6:00 – 6:30 PM Dinner  |
| 6:30 – 8:00 PM CPE |

| Friday 11/10 | Joint A&A Update with  |
| Suffolk Chapter | Radisson Hotel, Brentwood  |
| 9:00 AM – 5:00 PM |

| Tuesday 12/12 | A&A Update  |
| Marks Paneth, Woodbury | 6:00 – 6:30 PM Dinner  |
| 6:30 – 8:00 PM CPE |

## Attorney & Accountant Joint Committee

Kristina Albarella, Anthony Basile

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<tr>
<td>Tuesday 11/28</td>
<td>Joint w/ Suffolk Chapter Attorney</td>
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<tr>
<td>Accountant Networking Event, Fox Hollow, Woodbury, 6:00 – 9:00 PM</td>
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## CFO & Financial Executives

Anthony Aaronica, Joanne Krush

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<tr>
<td>Monday 9/18</td>
<td>Revenue Recognition</td>
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<tr>
<td>Deloitte, Jericho</td>
<td>8:00 – 10:00 AM</td>
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| Wednesday 10/18 | GAAP and Lease Update  |
| Deloitte, Jericho | 8:00 – 10:00 AM |

| Wednesday 11/15 | Service Org. Controls (SOC) Audits  |
| Wells Fargo, Melville | 8:00 – 10:00 AM |

| Thursday 12/14 | Economic Update  |
| Deloitte, Jericho | 8:00 – 10:00 AM |

## Community Affairs & Public Relations

Kenneth Rick

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### Cooperation with Educational Institutions
Anthony Basile, Abby Lucrezia

|-----------|----------|----------|----------|----------|
|           |          | **Thursday 11/2**  
Student CPA Fest  
Chateau Briand, Carle Place  
2:30 PM - 8:30 PM |

### Employee Benefits
Michael Corkery, Tina Isbitsky

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### Estate & Personal Financial Planning
Christine Hallahan, Eric Kramer, Scott Sanders, Stuart Shapiro, Pamela Diamond

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### Financial Literacy
Lawrence Just

|-----------|----------|----------|----------|----------|
| **Tuesday, 9/19**  
Form of Flow Through Entity,  
Taxation of Partnership,  
Limited Liability, Sub S Corp  
Café 58, Melville  
8:00 – 9:00 AM |
| **Saturday 10/28**  
3rd Annual Financial Fitness Day  
Freeport Library, Freeport  
10:00 AM – 2:00 PM |

### Litigation & Forensic Services
Pasquale Rafanelli

|-----------|----------|----------|----------|----------|
| **Tuesday 9/19**  
Joint with Suffolk  
Cybersecurity - Data Privacy & Protection  
Nawrocki Smith, Melville  
8:00 AM – 10:00 AM |
| **Tuesday 10/11**  
Litigation and Forensics Panel  
Grassi & Co, Jericho  
6:00 PM – 9:00 PM |

### Management of Accounting Practices
Louis Grassi

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## Membership
Scott Sanders

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<tr>
<th>September 2017</th>
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## Networking With Accountants
Neal Korenberg

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<th>October 2017</th>
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<th>December 2017</th>
<th>January 2018</th>
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<tbody>
<tr>
<td>Wednesday 10/18</td>
<td>8:00 – 10:00 AM</td>
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## Next Gen Committee
Jean David Chery, Alyssa Popov, Garrick Turano, Wei Xu | NextGen Liason - Lynne Fuentes

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<th>September 2017</th>
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## Practice Continuity & Succession Planning Committee
Craig Morris, Eliot Lebenhart, Larry Bloom

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<th>September 2017</th>
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<th>November 2017</th>
<th>December 2017</th>
<th>January 2018</th>
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<tbody>
<tr>
<td>Friday 10/27</td>
<td>The Vital Role of Marketing in Succession Planning</td>
<td>On Parade Diner, Woodbury</td>
<td>8:00 AM</td>
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<td>Friday 1/26</td>
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<td>The Role of Social Security in a CPA's Retirement Plan</td>
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<td>On Parade Diner, Woodbury</td>
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<th>May 2018</th>
<th>June 2018</th>
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<tbody>
<tr>
<td>Friday 4/27</td>
<td>Topic TBD</td>
<td>On Parade Diner, Woodbury</td>
<td>8:00 AM</td>
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## Real Estate
Vivian Martinez, Jodi Bloom-Piccone, Deana Wetzel

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<th>November 2017</th>
<th>December 2017</th>
<th>January 2018</th>
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<tbody>
<tr>
<td>Thursday 9/21</td>
<td>Real Estate Professionals and Passive Activity Losses for Real Estate Investors</td>
<td>Marks Paneth, Woodbury</td>
<td>6:00 – 8:00 PM</td>
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<tr>
<td>Thursday 11/3</td>
<td>Joint with Acctg/Auditing Accounting for Leases</td>
<td>Marks Paneth LLP</td>
<td>Woodbury, NY</td>
<td>6:00 – 8:00 PM</td>
</tr>
<tr>
<td>Thursday 12/1</td>
<td>Coop &amp; Condo Update</td>
<td>Marks Paneth LLP</td>
<td>Woodbury, NY</td>
<td>6:00 – 8:00 PM</td>
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<tr>
<td>Wednesday 1/4</td>
<td>Various Tax Topics presented by partners from Robert &amp; Holland</td>
<td>Marks Paneth LLP</td>
<td>Woodbury, NY</td>
<td>6:00 – 8:00 PM</td>
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### Small Practice Unit MAP
Alex Resnick, Eliot Lebenhart, Kenneth Hauptman

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<tbody>
<tr>
<td>Thursday 9/28</td>
<td>Friday 10/20</td>
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<tr>
<td>Attorneys and You - Working Together for your Clients</td>
<td>Cyber Security in Today's World</td>
<td>On Parade Diner, Woodbury 8:00 – 10:00 AM</td>
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<tr>
<td>NO MEETING TAX SEASON</td>
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### Taxation Committee
Jack Angel, Robert Barnett, Robert Schaffer

|-----------|----------|----------|----------|----------|

### Technology
Mark Plostock

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### Women's Focus Group
Geri Gregor, Christine Hallahan, Lisa Haynie, Liz Oberg, Natalie Verbanac

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<tr>
<td>Thursday, 1/11/18</td>
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<tr>
<td>Location – TBD</td>
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<td>6:00 – 8:00 PM</td>
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## OFFICERS/EXECUTIVE COMMITTEE

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>Company/Address</th>
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</thead>
<tbody>
<tr>
<td>Director (Past President)</td>
<td>Lynne M. Fuentes, CPA</td>
<td>Fuentes &amp; Angel CPAs LLC, 420 Jericho Tpke Ste 321, Jericho, NY 11753 (516) 656-0800 <a href="mailto:lynne@fuentesangelcpas.com">lynne@fuentesangelcpas.com</a></td>
</tr>
<tr>
<td>President Elect</td>
<td>Alex Resnick, CPA</td>
<td>Wild Maney Resnick LLP, 185 Froehlich Farm Blvd, Woodbury, NY 11797 (516) 364-8888 <a href="mailto:aresnick@wmrcpa.com">aresnick@wmrcpa.com</a></td>
</tr>
<tr>
<td>Vice President</td>
<td>Natalie Verbanac, CPA</td>
<td>Marcum LLP, 750 Third Avenue, New York, NY 10017 (212) 485-5550 <a href="mailto:natalie.verbanac@marcumllp.com">natalie.verbanac@marcumllp.com</a></td>
</tr>
<tr>
<td>Treasurer</td>
<td>Geri Gregor, CPA</td>
<td>Grassi &amp; Co., CPAs, 50 Jericho Quadrangle, Jericho, NY 11753 (516) 336-2496 <a href="mailto:ggregor@grassicpas.com">ggregor@grassicpas.com</a></td>
</tr>
<tr>
<td>Secretary</td>
<td>Kristina Albarella, CPA</td>
<td>Marcum LLP, 10 Melville Park Road, Melville, NY 11747 (312) 414-4624 <a href="mailto:kristina.albarella@marcumllp.com">kristina.albarella@marcumllp.com</a></td>
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## DIRECTORS 2-YR TERM (ENDING 5/31/19)

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<th>Name</th>
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<tr>
<td>Mark R. Cuccia, CPA</td>
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All submissions are due the 1st of the month prior to issue date. Email submissions to:
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<table>
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<th>Due Date</th>
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<tbody>
<tr>
<td>October</td>
<td>September 1</td>
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<td>November</td>
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<td>April 1</td>
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