It is with great sadness that I inform you that Sam Person passed away on November 11, 2017. Sam was the first President of the Suffolk Chapter and the only President in our Chapter to serve two consecutive terms. He has been called the “father of our Chapter.”

As Howard Levy (our Chapter’s 7th President) indicated in his memoir of Sam in the Trusted Professional:

“In the late 1960s, Sam noticed that many young CPAs—many employed by the large firms that were just beginning to set up shop in western Suffolk County—were, likewise, moving east because of the county’s more affordable housing and easier commutes. He also observed that the Society’s then Nassau/Suffolk Chapter was dominated largely by older, deeply entrenched practitioners, and that it afforded little or no opportunities for younger CPAs based in Suffolk County to network with colleagues, develop themselves and serve the profession. On May 12, 1971, Sam gathered about 35 Suffolk County practitioners at Dowling College and presented his vision for a separate chapter of the Society for Suffolk. Looking back in 2012 on that event, Sam said, “It was an idea whose time had come.” And after obtaining unanimous support for his idea from the group gathered in 1971, Sam’s strong leadership and sharp wit were apparent in his next few words. He said, “Now, who wants to be vice president?” You can read more of Howard’s article about Sam Person HERE.

While I did not know him well, I did have the pleasure of meeting Sam at our Chapter Past President events in 2012, 2013 and 2014. He brought with him a sense of such character, passion and humor. He certainly will be missed.

Amanda Sexton

(continued...)
President’s Message (cont’d)

Sam Person was incredibly proud of our Chapter’s evolution and success – we are still one of the most active states across our 15 Chapters and I see a lot of that pride within each of us today. While Sam is no longer with us, let us continue the progression, evolution and success of this Chapter.
President’s Message (cont’d)

During the past month, we have had several great events:

• Our Toys for Tots drive was even bigger and better than last year. Great job and thank you to everyone that participated. A big thank you to Cynthia Barry and the rest of the team for all their hard work!!!

• Nassau and Suffolk Members in Industry groups partnered up for a 2 CPE session on the changes to SAS70 under SOC reporting at Wells Fargo in Melville.

• Bruce Newman of Protegrity Advisors and Ernest Patrick Smith of Nawrocki Smith educated the FVS Committee on the basics of M&A (mergers and acquisitions) and tax implications for various types of transactions. See more on page 12.

• We had three Society leadership officials speak to us during our annual Town Hall meeting: Executive Director Joanne Barry, President Harold Deiters, and President Elect Jan Harringer. Joanne provided us with a detail of the Society’s legislative agenda for 2018; Harold provided us some fascinating statistics about different workforce generations and their respective workstyles, goals and preferences; Jan updated us as to upcoming changes in the audit world. More details on this meeting on page 5. We are looking forward to another great presentation next year.

The following are events we have coming up for the rest of December and January:

• December 19th - Renee Rampulla will provide our annual 2 CPE NYS Ethics Update – I hope you will join us at Stonebridge Country Club Club in Hauppauge. Dinner will be included.

• December 21st – Paul Becht will provide a GAAP update (2 CPE) at Empire National Bank in Islandia.

• January 5th – John Spatola will speak to us about identity theft issues and last year’s dirty dozen tax schemes (2 CPE) at the Bank of America building in Melville.

• January 10th – the East End Committee will provide 3 CPE on the fundamentals of Excel – designed for both beginners and advanced professionals.

• January 16th – the Employee Benefit Committee is holding a session on 401(k) cost analysis in Woodbury (2 CPE).

• January 17th – Members in Industry will provide an annual tax and economic update at Empire National Bank in Islandia (1 CPE).

Please see flyers on these events in this newsletter.

I hope you enjoy the rest of your holiday season. See you in the New Year!!

– Amanda Sexton
Special Offer from the Suffolk Chapter

SPONSORSHIP PROGRAM
Here’s your chance to make the most of your membership!
Sponsor one of our events and get in front of colleagues, referral sources, and potential clients.

Step One: Choose the type of event based on your target audience.
- golf outings
- networking events
- technical workshops
- informational seminars
- charitable events

Step Two: Become a sponsor. At a cost of $1,000 you receive:
- recognition in the Suffolk Chapter newsletter
- logo/recognition in all event flyers
- opportunity to speak at the event
- booth or table display space

To take advantage of this great offer, contact our Sponsorship Chair:
Thomas S. Pirro: (631) 472-7637; tpirrocpa@optonline.net
On Tuesday, November 28, the Suffolk Chapter hosted the NYSSCPA Town Hall Meeting: State of the Accounting Profession. The event was held at the Irish Coffee Pub in East Islip from 8:00-10:30am. In this meeting the Chapter was addressed by NYSSCPA Executive Director Joanne Barry, current NYSSCPA President (and Suffolk Chapter's own!) Harold Deiters III, and NYSSCPA President-Elect Jan Herringer.

Joanne Barry started the meeting by providing a legislative update on current issues the Society is addressing in Albany. Topics such as license requirements, ethics requirements, mandatory peer review, and non-CPA firm ownership are currently being reviewed and addressed by the Society.

Next, Harold Deiters presented on workforce issues and changes we are all going through. Harold discussed the next generation of CPAs, technology advances affecting how we work, shifts in the current workforce, and the different styles of each generation. This helpful conversation provided tips on how to work with a variety of styles in the workplace among Baby Boomers, Gen X’ers, Millennials, and the upcoming Gen Z.

The presentation was closed out by Jan Herringer, who discussed diversity in the workplace including recent statistics of women in the accounting profession, in addition to several updates affecting the auditing profession.

Attendees received 2 CPE credits and were treated to a wonderful breakfast at the venue. The Suffolk Chapter would like to thank the NYSSCPA officers for their time and for the insightful presentation!
2017 Toys for Tots Campaign – 23 Years and Going Strong

By Cynthia Finn Barry, CPA

On Friday, December 8, 2017, more than 20 members of the United States Marine Corps Reserves from Farmingdale descended upon the offices of Sheehan and Company CPA, PC in Brightwaters with a seven-ton truck, four vans and personal vehicles. Over the years, the Marines have changed their method of pick up as the collection has grown in epic proportions. This year we had in excess of **165 boxes** – our largest collection to date!

What began as a grassroots effort by the Suffolk Chapter Young CPAs Committee in 1995 with 10 member firms participating, has grown to encompass drop off sites in Nassau, Queens, Brooklyn and Manhattan in addition to Suffolk.

As always, one of the key factors that contributed to the success of the Toys for Tots campaign was the support provided by Sheehan & Company, CPA, PC and its employees, NYSSCPA member firms and their employees, local businesses, all branches of The First National Bank of Long Island, several branches of Valley National Bank, Gold Coast Bank, Chase Bank, Stony Brook University Accounting Society, Target, and several client offices that participated in the drive.

We were again extremely fortunate to have so many volunteers to the program, it is impossible to name them all without missing someone. Volunteers were needed to obtain boxes from grocery stores, assemble and wrap the boxes, distribute and pick the boxes up from the many locations, coordinate the collection efforts at each location, shop for toys and arrange the collection for the Marines. Several volunteers enlisted the efforts of their own children this year and educated them on how to help those that are less fortunate.

The committee members extend their sincere appreciation to the following firms, local businesses and their employees and customers for helping make a difference this holiday season for underprivileged children in our area.

Albrecht, Viggiano, Zureck & Company, PC
American Diagnostic Corp
Arizona Iced Tea
Atlantic Agency Inc.
Baker Tilly
BDO Seidman
Castellano Kornenberg & Co.
Castle Financial Advisors, LLC
Cerini and Associates
Chase Bank
Cohn Reznick LLP
Columbia Care
Covati and Janshen, CPAs PC
Cullen & Danowski, LLP
DeTolla & DeTolla DDS, LLP
DIT Cleaners
Dr. Seymour
Elements Massage, Northport
Fairfield Properties
First National Bank of Long Island
Forest Hills Financial Group
Fuocco Group
Gaseteria
Giambalvo, Stalzer & Co.
CPA, PC
Gold Coast Bank
Gold’s Gym – Islip
Gourmet Factory
Grassi & Co., CPAs, PC
Hairique
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KPMG
Knights of Columbus, Smithtown
Lighthouse Insurance
Long Island Housing Partnership
Marcum LLP
Margolin, Winer & Evens LLP
Markowitz, Fenelon & Bank LLP
Mather Hospital
Moomjian & Waite, LLP
NY School Insurance
Ovations Dance Studio
Owen Petersen & Co. LLP
Port Jefferson Library
Premier Payroll Solutions
Robert J. Eckhardt & Co., PC.
SBU – Dean’s Office
Schwartz & Co, CPA
SCNB
Sheehan & Company, CPA, PC.
SITA
St. Joseph’s College Accounting Society
Stony Brook University Accounting Society
Stony Brook University Medical Center
Storage America
Suffolk County District Attorney’s Office
Suffolk Ophthalmology
SUNation Solar Systems, Inc.
Total Dental Care of Middle Island
Valley National Bank
WE Transport
WeiserMazars, LLP
Woodhaven Nursing Home

St. Joseph's College
Accounting Society
Stony Brook University
Accounting Society
Stony Brook University
Medical Center
Storage America
Suffolk County District Attorney’s Office
Suffolk Ophthalmology
SUNation Solar Systems, Inc.
Total Dental Care of Middle Island
Valley National Bank
WE Transport
WeiserMazars, LLP
Woodhaven Nursing Home
On Wednesday November 15, the NYSSCPA Suffolk Chapter – NextGen Committee, the Risk Management Association – Young Professionals, and New York State Bar Association – Young Lawyers Section cohosted its second annual “Second Annual Young Professionals Holiday Food Drive & Networking Event” at the Main Event in Farmingdale.

There were approximately 35 individuals in attendance including lawyers, bankers, and CPAs who each brought with them non-perishable food items to support a local charitable organization and enjoyed the evening networking with an open bar and buffet dinner. All proceeds from the event are also to be donated to Island Harvest.

The Risk Management Association – Young Professionals group were in charge of registration for the event and did a great job in coordinating with the venue to ensure a great night for all.
Student Night

On Tuesday, November 7, the Cooperation with Educational Institutions Committee and the NextGen Committee co-hosted this year's Student Night. The event was hosted at St. Joseph's College in Patchogue from 6:30-9:30pm.

Four speakers shared their career paths with the students, which covered careers in auditing, tax, the private sector, and forensics. The presentations demonstrated that with an accounting degree and CPA license, there are many different directions your career can take you.

After the presentations, students networked with professionals to learn more about career opportunities in accounting. The session proved to be informative and provided a great platform for students to ask questions and learn more about the profession.
Committee Report:
East End

On Friday, November 10, the East End Committee hosted an Estate Planning Panel Discussion at the Hotel Indigo in Riverhead. The panel included Thomas Terry, CPA from Markowitz, Fenelon & Bank, LLP, Bernadette Tuthill, Esq. from Twomey, Latham, Shea, Kelley, Dubin & Quartararo LLP, and Stephen Gilbert from Prudential Annuities and was moderated by Sean Kelly, CPA of Markowitz, Fenelon & Bank, LLP. Topics discussed included, but were not limited to, how trusts can be used an estate planning tool, the importance of having a will, common issues for smaller to medium sized estates, and when to start an estate plan. The panel was well received by all in attendance. This was the East End Committee’s first technical event!

A special thanks to our speakers and our sponsor, Bank of America Merrill Lynch, for making this happen!
“Savvy Social Security Planning: How to Avoid Costly Mistakes” was the topic of the Employee Benefits Committee’s October 24, 2 hour morning session. Adelphi University generously provided the venue at its Education and Conference Center in Hauppauge.

Our speaker was Joseph DiSalvo of Quest Capital and Risk Management, Inc., who also sponsored a continental breakfast. Joe has more than 20 years of experience in the financial services industry, helping people retire successfully. He is an accomplished speaker, has lead over 100 educational workshops for a wide range of national organizations and is currently writing a textbook.

With approximately 20 people in attendance, Joe spoke about the key role that social security plays in one’s retirement income portfolio and the ways that it can be maximized if the proper planning is put in place. Joe’s presentation was easy to understand and contained an enormous amount of information pertaining to social security – the “basics” as well as key planning strategies.

Many participants had questions and most walked away thinking how what was learned can be applied - to them, their families, friends and clients.

The Committee looks forward to working with Joe again in 2018.

On Tuesday, November 28, the Employee Benefits Committee hosted another 2 hour morning session titled “New York Paid Family Leave Act”. APS Pension & Financial Services Inc. generously sponsored the venue and breakfast at their offices in Woodbury.

The course was designed to give an overview about the New York Paid Family Leave Act and provide some insight as to what employees and employers can expect and will need to do. The course was presented by Dawn Davidson Drantch, Esq. Approximately 10 people attended the seminar.

Ms. Drantch, Corporate Counsel for Alcott HR, a Professional Employer Organization (PEO) has been a practicing management-side labor and

continued...
Committee Report: Employee Benefits (cont’d)

employment attorney for more than 25 years, beginning her career at the Civil Rights Division of the United States Department of Labor in Washington, DC. Currently, she guides Alcott’s HR’ policy/procedural development as well as employment law compliance and training programs in more than 40 states and is a frequent presenter and media source on issues of workplace law and best practices.

Ms. Drantch’s presentation was insightful and engaging. It provided an overview of employer/employee coverage; employee eligibility and employer requirements; qualifying reasons for taking leave, amount of leave and benefits; funding of benefits and waivers; and the application process itself.

Although the turnout was light, the audience asked very thought-provoking questions and despite the fact that some aspects of the act (effective January 1, 2018) are still unclear, Ms. Drantch was able to shed light on many concerns that were raised.

The Committee plans to invite her back as she has offered to present on a broad range of benefit-related topics.
Committee Report:
Forensic and Valuation Services

The Forensic and Valuation Services Committee of the NYSSCPA Suffolk Chapter held its second technical event of this fiscal year on November 16. The price of $20 included 2 CPE in addition to bagels, parfaits, pastries and coffee from Au Bon Pain.

Bruce Newman of Protegrity Advisors and Ernest Patrick Smith, CPA/ABV/CFF, CVA, CFE of Nawrocki Smith LLP gave an in-depth presentation on mergers and acquisitions converting the types of buyers, the team of advisors needed, the transaction process, the valuation process, the deal structure, how to negotiate the deal and common mistakes of sellers.

Next Up:
- The committee’s next technical event will be on January 5, 2018, covering how to cleanup identity theft for tax purposes and the top 12 tax scams of the year. See details on page 17.
- On January 23, 2018, we will be having a social event at Mini Monet Art Studio in Sayville where all participants will be guided through creating a winter wonderland themed painting. See details on page 21.

For more information on these events, contact John Spatola at jspatola@nsllpcpa.com.
Committee Report:
Members in Industry

The Suffolk Chapter NYSSCPA Members in Industry committee meets monthly from September through May. We welcome CPAs across all industries and practices. Our morning meetings start and end promptly, from 8 to 10 a.m. There are no entry fees and meetings earn two CPE credits. Joint sessions with Nassau charge a $10 fee. The State Society has requested that all attendees register online to ensure you receive your CPE certificates. Please register at NYSSCPA.org. For more information: Janet Verneuille, JVerneuille@empirenb.com.

On Wednesday, November 15th the committee held a joint meeting with the Nassau CFO committee covering Service Organization Control (SOC) Reporting - The Changes to SAS 70, presented by John K. Hoffman, CPA at Nawrocki Smith LLP. Wells Fargo Bank in Melville hosted the session.

Changes relative to the SSAE 16 & SSAE 18 covering Service Organization Control reports were discussed including the distinctions between SOC 1, 2 and 3 reports. The audience asked many questions as many attendees realized how these reports pertain to their companies and clients. Controls covered are beyond those over financial reporting including security, availability, processing integrity, confidentiality and privacy. The reports are necessary due to increased outsourcing services due to technology (Cloud, Software as a Service (SAAS), Platform as a Service (PAAS), and Infrastructure as a Service (IAAS)).

John also covered the recently enacted SOC Report for Cybersecurity, which provide useful information about an entity’s cybersecurity risk management program and controls for users to make informed decisions. Most of us in the room agreed that this is a growing practice area.

Upcoming sessions:
Thursday, December 21, 8-10 a.m.
Annual GAAP Update
Speaker: Paul Becht, Margolin, Winer & Evens LLP. Hosted by Empire National Bank, 1707 Veterans Highway, Islandia. See details on page 16.

Wednesday, January 17, 8-10 a.m.
Annual Tax and Economic Update

Wednesday, March 21, 8-10 a.m.
Sales Tax Defense
Speaker: Mark Stone, Sales Tax Defense LLC. Hosted by Empire National Bank, 1707 Veterans Highway, Islandia.
Mark Your Calendar...

DECEMBER 19, 2017
Annual Ethics Update. Details on page 15.

DECEMBER 21, 2017
Members in Industry meeting:
Annual GAAP Update. Details on page 16.

JANUARY 5, 2018
Forensic & Valuation Committee meeting:
Identity Theft Cleanup. Details on page 17.

JANUARY 10, 2018
East End and NextGen Committees:
Fundamentals of Microsoft Excel. Details on page 18.

JANUARY 16, 2018
Employee Benefits Committee Meeting: Total 401(k) Cost Analysis. Details on page 19.

JANUARY 17, 2018

JANUARY 17, 2018
East End Committee Meeting.
8 a.m. at Hotel Indigo, Riverhead.
Info/RSVP: skelly@mfbcpa.com.

JANUARY 23, 2018
Forensic & Valuation Committee:
Painting with Business Professionals. Details on page 21.

JANUARY 25, 2018
Banker/CPA Social Event. Details on page 22.

FEBRUARY 1, 2018
East End Social Networking. Details on page 23.

MARCH 21, 2018

MAY 16, 2018
East End Committee Meeting.
8 a.m. at Hotel Indigo, Riverhead.
Info/RSVP: skelly@mfbcpa.com.

For up-to-the-minute NYSSPA Suffolk chapter activities CLICK HERE
NYSSCPA Suffolk
Annual
ETHICS UPDATE

Tuesday, December 19, 2017
6:30 to 8:30 p.m.
(registration at 6 p.m.)

at Stonebridge Country Club, Smithtown

Please join us for our annual Ethic Training,
with this year’s speaker:
Renee Rampulla.

2 CPE credits
Includes buffet dinner, drinks, and networking.

$50 Members | $75 Non-members
$0 member of the Suffolk Chapter Subscription Program

RSVP HERE
For information: Amanda Sexton, asexton@mfbcpa.com
Gearing Up for GAAP...

The NYSSCPA Suffolk Members in Industry Committee invites you:

Annual GAAP Update
Thursday, December 21, 2017
8 to 10 a.m.
at Empire National Bank, 1707 Veterans Highway, Islandia

- Overview of FASB Activities, including PCC Update
- Pronouncements regarding:
  - Revenue Recognition
  - Lease Accounting
  - Business Combinations
  - Statement of Cash Flows
  - Not-for-Profits
- Recent Accounting Pronouncements
- Revenue From Contracts with Customers: Principal Versus Agent Considerations
- Investments: Equity method and Joint Ventures
- Goodwill, Business Combinations, and Consolidation
- Simplifying the Test for Goodwill Impairment

Speaker:
Paul E. Becht — Margolin Winer & Evens LLP

2 CPE credits (course code: 29081811)

RSVP HERE
The NYSSCPA Suffolk Forensic and Valuation Services Committee invites you:

Identity Theft Cleanup & Last Year’s Dirty Dozen Tax Schemes
Friday, January 5, 2018 | 8-10 a.m.
at the Bank of America Building
290 Broad Hollow Road, Suite 115E, Melville

$10 per person. Breakfast included.

How to deal with and rectify having your identity stolen for tax purposes; The top 12 tax scams of the year.

Speaker: John Spatola, Nawrocki Smith LLP

2 CPE credits (course code: 29085818)

RSVP HERE
The NYSSCPA Suffolk East End and NextGen Committees invite you to

**Fundamentals of Microsoft Excel**

**Wednesday, January 10, 2018**

8 a.m. to 12 p.m.

at the Hotel Indigo, 1830 W. Main Street, Riverhead

- Ideal for anyone whose job requires a solid understanding of Excel
- Discover time-saving shortcuts and tricks that can double your working speed
- Session will include basic Excel fundamentals and progress to more advanced techniques
- Learn how to use powerful functions like VLOOKUPs and pivot tables

**Speaker:**
Michael Zumchak, Easy Excel Classes

**3 CPE credits** (specialized knowledge, course code 29085815)

$25 members | $30 non-members

[RSVP HERE](#)

Or contact Jani Rothberg, jrothberg@mfbcpa.com
Pension Plan Primer...

The NYSSCPA Suffolk Employee Benefits Committee invites you:

Total 401(k) Cost Analysis

Tuesday, January 16, 2018
8:30 to 10:30 a.m.  (Registration at 8:00)
at APS Pension & Financial Services Inc.
1000 Woodbury Road, Lower Level, Woodbury

- What are the hidden costs in 401(k) and 403(b) plans?
- How can a plan’s cost be benchmarked?
- Is there significant variation in costs between financial providers?
- Who should pay costs in the plan - employer or employees?
- What services should be provided by vendors?

Speaker: Stephen Abramson, CPC, CLU, ChFC
APS Pension & Financial Services Inc.

Sponsored by: Free!  |  2 CPE credits (Course code 29085817)

RSVP HERE
Annual Economic Update...

The NYSSCPA Suffolk Members in Industry Committee invites you:

Annual Tax & Economic Update

Wednesday, January 17, 2017
8 to 10 a.m.
at Empire National Bank, 1707 Veterans Highway, Islandia

- National economic update for 2017
- Local Long Island economy update for 2017
- Top tax scams of 2017
- 2017 Tax Update
- What will 2018 look like

Speakers:
Ernest Patrick Smith, John Matthew Spatola — Nawrocki Smith LLP

2 CPE credits (course code: 29085816)

RSVP HERE
Calling All (Non?) Artists...

The NYSSCPA Suffolk Forensic and Valuation Services Committee invites you:

Painting with Business Professionals

Tuesday, January 23, 2018 | 7:00 p.m.
at Mini Monet Art Studio, 64 Railroad Avenue, Sayville

$35 per person

Join us for a social event as we do a guided painting of a winter wonderland!

More information: John Spatola, (631) 756-9500 x 271, jspatola@nsllpcpa.com
Our Annual Event...

Nassau/Suffolk Joint Chapter
Annual Networking Event

Thursday, January 25, 2018
6-9 p.m.
at The Fox Hollow
7725 Jericho Turnpike, Woodbury

$75 per person | $85 at the door

Join the Suffolk and Nassau Chapter Cooperation with Bankers and Other Credit Grantors Committees for an evening of networking, cocktails, and buffet dinner.

RSVP required by January 22, 2018
REGISTER HERE
Heading East...

The NYSSCPA Suffolk East End Committee invites you

Networking on the East End

Thursday, February 1, 2018 | 6 to 8 p.m.
Atlantis Banquets & Events – Sea Star Ballroom
431 East Main Street, Riverhead*

If you do business anywhere east of, say, Route 112, join us for this east end networking event!

Open bar!  Hors d’oeuvres!  Business casual dress!

$25 for members
$40 for non-members

Register:
asexton@mfbcpa.com

* Parking available behind Atlantis and across the street, by Ostrander Avenue
Suffolk Chapter Board & Committees

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The NYSSCPA Suffolk Chapter has a few committees looking for a chair! Contact Amanda Sexton for info on:

- EMERGING TECHNOLOGIES
- ESTATE/FINANCIAL PLANNING
- MANAGEMENT OF AN ACCOUNTING PRACTICE
- SMALL BUSINESS

December 2017
Fun and Games – Sudoku

The objective is to fill the grid with digits (1-9). Each digit appears only one in each column, row, and the nine 3×3 subgrids.

SOLUTION:
Get Involved with NYSSCPA Suffolk and Help Make a Difference

COMMITTEE SERVICE APPLICATION

Thank you in advance for getting involved and ensuring the success of this chapter. Please rank the top 3 committees in which you have an interest:

___ Accounting & Auditing
___ Community Affairs
___ Construction Contractors
___ Cooperation with Attorneys
___ Cooperation with Bankers and Other Credit Grantors
___ Cooperation with Educational Institutions
___ CPE/Professional Development
___ East End
___ Emerging Technologies
___ Employee Benefits
___ Estate/Financial Planning
___ Forensic and Valuation Services
___ General Taxation
___ Golf Outing
___ Management of Accounting Practice
___ Members in Industry
___ Membership
___ NextGen (Young CPAs)
___ Not-for-Profit & Government
___ Public Relations
___ Real Estate & Construction
___ Small Business

Name: ___________________________________________________________________________________

Firm: __________________________________________________________________________________

Address: _________________________________________________________________________________

City, State, Zip: __________________________________________________________________________

Telephone: _______________________________________________________________________________

E-mail: __________________________________________________________________________________

Please forward your response to:
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