NYSSCPA Westchester Chapter’s 16th Annual Estate, Tax and Financial Planning Conference

June 10, 2016
8:50 a.m.–5:00 p.m.

Registration/check-in at 8:30 a.m.

At the
Doral Arrowwood
975 Anderson Hill Road, Rye Brook NY 10573

8 CPE - Course Code 28611733

Member/Nonmember Fee: $140 member; $165 nonmember

See attached Agenda on Page 5 for more details!

To Register click here!

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From New Chapter President Catherine Censullo…

Dear Fellow Westchester Chapter Members,

I consider it both an honor and a privilege to serve you in my new role as President of the Westchester Chapter of the New York State Society of CPAs. Thank you to our Past President, Michele Lazzara for a job well done, and to our Board of Directors, for leading so many successful events this past year.

You are fortunate to have such an active Chapter, with a wonderful Board of Directors, committee chairs, members, and support staff, who give so much of their time and effort to make your Chapter as successful as it is.

Congratulations to the 2016 George Mendel scholarship winners and their parents: Lauren Friedman of Briarcliff Manor High School, Yaniza Rodriguez of Lincoln High School, Tiffany Poloco of Ursuline High School, Erica Carlin of North Salem High School, Jeremy Klein of Blindbrook High School, and Domenique Capone of Eastchester High School.

My first goal as President is to concentrate on the youth of our profession – you are our future. I would like to ask your help in expanding the outreach to our high schools and colleges, offering more internship and mentoring opportunities, and providing more training and leadership opportunities to our young developing CPAs and CPA candidates.

I challenge each Westchester managing partner to send at least one of your young professionals to this year’s FAE “Next Gen: The Conference for Young CPAs” being offered in nearby Manhattan on July 25th, 2016, and will recognize those firms who participate in this wonderful opportunity for their future leaders of tomorrow.

I also encourage you to think about internship and mentoring opportunities in your firms.

My second goal is to stress the importance of teamwork with your fellow professionals, both as a way of developing alliances with your colleagues and providing additional resources for your clients. I encourage you to expand your circles of influence amongst the other professionals who are part of your clients’ teams and potential resources for your clients to draw upon.

The Allied Professional Group of Westchester, consisting of the Westchester Chapter of the New York State Society of CPAs, the Westchester County Bar Association, and the Financial Planning Association of the Greater Hudson Valley, have been holding about three events per year for the past three years to network together, work together, learn together and share best practices with each other. I encourage you to become a part of this effort to strengthen your resources as a leader in this profession.

Our next event is one not to miss on the evening of June 9th at the Doral Arrowwood in Rye Brook. What a great opportunity for you to demonstrate your leadership by rubbing elbows with your colleagues and building your circles of influence, while gaining insightful knowledge about Alzheimer’s disease and dementia, an area that touches you through your clients, their families, and your own families in some way. You will even earn 3 CPE credits in the process.

Another networking opportunity to share with your colleagues, your clients, and your circles of influence is our Annual Golf Outing event at Willow Ridge Country Club on Monday June 13th. Don’t miss this opportunity to strengthen your alliances in a comfortable setting.

Continued on next page...
My third goal is to encourage the members of our organization to focus on succession planning so that our clients will still be served after you are no longer able to serve them.

Our Chapter’s population has an increasing number of older CPAs who need to look beyond the point where they will be able to serve their clients themselves.

This point was brought home to me over three years ago when a key employee of my firm, who had been working with me for over three years and who was under age 50, came down with the flu in February 2013. Thinking that after a week or so, she would be back with me, the devastating news came that her flu turned into viral meningitis and encephalitis. She lost 15 years of her short-term memory and, although the doctors said she would fully recover after six months, that never happened.

She was never able to return to work, drive a car, or support herself. It was a blow to my firm and took a long time to recover. Trying to replace the skill of a worker who had a Mensa IQ, knew the clients, and could easily handle the most complicated of situations was not easy. Dealing with this type of situation showed me the importance of succession planning. I want to help the members of your organization to be prepared for their next steps.

I hope to provide some training opportunities to help those of you who have not yet thought through your succession plans to help you be more prepared for this effort and to work through and develop your plan.

My fourth goal is to have more outreach to the community and find more ways to help the community, whether it be additional education to the community or more ways of giving back and donating to charitable causes in the community.

On that note, I invite you to save the date on November 3, 2016, when the Young CPAs/Next Gen Group of Westchester will be hosting a wine-tasting (and maybe even beer-tasting) event to benefit Blythedale Hospital. The event is open to everyone, even if you do not happen to be a Young CPA, and will benefit a great organization.

I am also thinking of replacing our October networking event with a late November/early December holiday party/networking event where we can include an element to give back to the community with some sort of charitable donation.

Please know that your suggestions and ideas are welcome. I also invite the managing partners to meet with me on an individual basis to better understand your needs and concerns and how the organization can better serve you. I look forward to a great year ahead and look forward to your continued guidance and support.

Thank you for all that you do to make this a truly great chapter.

Best Regards,

Catherine Censullo can be reached at: 914-997-7724 or by email at: Catherine.Censullo@cmcensullocpa.com
JOIN THE
ALLIED PROFESSIONAL GROUP OF WESTCHESTER
FOR
A NETWORKING NIGHT AT THE MOVIES
Thursday, June 9th, 2016
5:30 pm – 6:45 pm: Networking, Food, and Drinks
7:00 pm – 9:30 pm: Live Presentation and Movie
HELPING YOUR CLIENTS AND LOVED ONES DEAL WITH ALZHEIMER’S DISEASE
3 CFP CE, 3 CPE CREDITS and 3 CLE Certificates
Doral Arrowwood, Rye Brook, NY
REGISTRATION FEE: $75 (Members & Non-Members)

Dear Fellow Members and Friends of the Westchester County Bar Association, the Financial Planning Association of the Greater Hudson Valley and the Westchester Chapter of the New York State Society of CPAs:

We invite you, your spouse or significant other, and your friends to join us for a spectacular networking and educational event on a topic that is near and dear to us all: Helping Your Clients and Loved Ones Deal with Alzheimer’s Disease.

We have a special evening planned at the Doral Arrowwood in Rye Brook on June 9th, 2016 that you won’t want to miss!

Our networking session begins the evening from 5:30 pm to 6:45 pm where you will be able to mix and mingle with your colleagues and friends, make new connections, establish new resources, and develop new opportunities to forge alliances that will benefit both your current and future prospects and clients as well as your family and loved ones. Get your fill of food and drink as you bond with other attendees and prepare for the evening’s program.

Then it will be time to gather your popcorn and beverages, and settle into the theater to hear from pioneer Peter J. Strauss of Drinker Briddle as he sets the stage and holds a pointed discussion on the topic in preparation for your viewing of the Glen Campbell Story in the documentary film “I’ll Be Me.” Click here if you wish to see his bio.

Learn more about the eldercare issues dealing with Alzheimer’s disease and other cognitive illnesses that touch us all. Find out about the ethical issues that need to be addressed. Gain a better understanding of the fiduciary responsibility and legal capacity issues surrounding this area. Better aid and assist your clients, prospects and loved ones as they face these issues with their own family members.

See how Glen Campbell and his family deal with this issue on a very personal level and hear from other professionals and celebrities who have had to face and deal with these issues first hand. Gain a perspective that will help you better assist your clients and loved ones when they are faced with similar challenging situations.

SEATING IS LIMITED! PLEASE REGISTER BY: Wednesday, June 1st, 2016

TO REGISTER:
Contact your Association Person below.
Registration fee for members and non-members is $75.00.
You will be provided registration confirmation required to attend the event.
All food and non-alcoholic beverages included in the price. One glass of wine or beer included in the price. Cash bar available for additional alcoholic beverages.

FPA Greater Hudson Valley
Marcia Kaplan, CFP®
marcia.s.kaplan@ampf.com
914-289-0700 x11
3 CFP CE Credits - Program ID 224884
To Register Online please click here

NYSSCPA
Amy Amodeo
rie@ecker-law.com
914-273-0777 (fax 914-273-1787)
3 CPE Credits - Course Code 29112701
To Register Online please click here

Westchester County Bar Association
Luis Rivera, Esq.
cle@wcbany.org
914-761-3707 x20
Certificates for 3 CLE credits will be provided to Attorney attendees

Date: Thursday, June 9th, 2016
Time: 5:45 p.m. to 9:30 p.m.
Location: Doral Arrowwood, 975 Anderson Hill Rd, Rye Brook, NY

For directions to the Doral Arrowwood please click here.
Westchester Chapter's Sixteenth Annual
Estate, Tax and Financial Planning Conference
June 10, 2016

AGENDA

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<thead>
<tr>
<th>Time</th>
<th>Speaker</th>
<th>Topic</th>
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<tbody>
<tr>
<td>8:30am</td>
<td>Registration</td>
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<tr>
<td>8:50am</td>
<td>Introduction by Conference co-Chairs Robert L. Ecker, Esq., CPA, LLM</td>
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<td></td>
<td>and Howard P. Klein, CPA, MS</td>
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<tr>
<td>9:00am-10:10am</td>
<td>Blanche Lark Christerson, Esq. Managing Director, Deutsche Asset &amp; Wealth Planning: An Update</td>
<td>Managing Director, Deutsche Asset &amp; Wealth Management</td>
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<tr>
<td>10:10am-11:10am</td>
<td>Daniel L. Daniels, Esq. Wiggin and Dana, LLP</td>
<td>IDGT Sales and Succession Planning</td>
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<tr>
<td>11:10am-11:20am</td>
<td>Break</td>
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<tr>
<td>11:20am-12:30pm</td>
<td>Lawrence Keiser, Esq. Stern Keiser &amp; Panken, LLP</td>
<td>Business Income Tax Issues For Estate Planners</td>
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<td>12:30pm-1:30pm</td>
<td>Lunch Lunch Speaker: Sharon Horowitz, PhD. Family Concerns In Succession Planning</td>
<td>Lunch</td>
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<tr>
<td>1:30pm-2:30pm</td>
<td>Donald Novick, Esq. Novick &amp; Associates, P.C.</td>
<td>Litigation Issues For Estate Planners</td>
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<tr>
<td>2:30pm-3:30pm</td>
<td>K. Eli Akhavan Akhavan Law Group, LLP Jonathan I. Shenkman Oppenheimer &amp; Co., Inc.</td>
<td>Estate Planning For Athletes and Entertainers</td>
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<tr>
<td>3:30pm-3:40pm</td>
<td>Break</td>
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<tr>
<td>3:40pm-5:00pm</td>
<td>Sharon L. Klein, Esq. Wilmington Trust, N.A.</td>
<td>Current Estate Tax Issues in the Tri-State Area</td>
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<tr>
<td>5:00pm</td>
<td>Closing Remarks by Conference co-Chairs Robert L. Ecker, Esq., CPA, LLM and Howard P. Klein, CPA, MS</td>
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NYS SOCIETY OF CPA’S - WESTCHESTER CHAPTER
Announces
THE ANNUAL GOLF OUTING EVENT
MONDAY, June 13th, 2016
WILLOW RIDGE COUNTRY CLUB
123 North Street – Harrison, NY (914) 967-6161

PAYMENT RECEIVED PRIOR TO DECEMBER 31ST, 2015 - $300
PAYMENT RECEIVED PRIOR TO FEBRUARY 15TH, 2016 - $325

SPONSORSHIPS:

| Service                          | Price  
|---------------------------------|--------
| Lunch, Golf, Cocktail Hour, Buffet & Dessert* | $350   
| Cocktail Hour, Buffet and Dessert Only          | $150   

* Includes greens fees, forecaddie, cart, and driving range

LIMITED GOLD SPONSORSHIP: $1,850 includes
- Sign near tee box area that company sponsored the hole
- Table at registration desk
- Reserved tables at cocktail hour and dinner
- Recognition at dinner
- Brunch, golf, drinks and dinner for one

Hole Sponsorship - $150

**CLICK HERE TO REGISTER NOW!**

- Line up your foursome with CPAs, clients, bankers, lawyers, etc. If you can’t complete a foursome, we will do it for you.
- The day begins with sign-in/registration/brunch at 11:00 am, followed by a shotgun start at 12:30 pm. Cocktail “hour” and hors d’oeuvres will begin at approximately 5:30 pm with open bar. Prizes will be awarded during buffet dinner. All pro shop certificates must be redeemed that evening.
- Our members, attorneys, bankers, and friends have contributed prizes. We thank them for their contributions.
- Clients, spouses and others are welcome to attend!
- Make your reservations early. I look forward to seeing you.
- Rain or Shine! * No Refunds

Click here to register now!

Jeff Schwartz, Chairman

Westchester Chapter Golf Outing – June 13th, 2016

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<thead>
<tr>
<th>Name (please print)</th>
<th>_____________________________</th>
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<tbody>
<tr>
<td>Office Telephone Number</td>
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<tr>
<td>Firm Name and address</td>
<td>_____________________________</td>
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<tr>
<td>E-mail Address:</td>
<td>_____________________________</td>
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</tbody>
</table>
| I want to play in a scramble format (OR BELOW) | ☐
| I want to play my own ball | ☐
| Dinner Only | ☐
| Please put me in a foursome. My handicap is ______. | ☐
| I have arranged my foursome (Please list other 3 names) | ☐
| ☐ ☐ ☐ | ☐ ☐ ☐ |
| My check for $ _________ is enclosed. | ☐

Send check payable to “NYSSCPA – Westchester Chapter” to:
Stanton and Leone
1025 Westchester Avenue – Suite 301
White Plains, NY 10604
Att’n: Jeffrey A. Schwartz, CPA
Telephone (914) 286-6908
E-Mail: jschwartz@eba.nyc
REMINDERS:

Next Gen Food Bank Volunteering
at Foodbank for Westchester in Elmsford

When: Friday, July 29, 2016
Time: 1:00 p.m. - 3:00 p.m.

Followed by a get together at Captain Lawrence

For more information and/or to register please e-mail Heather Oboda at: hoboda@citrincooperman.com

SAVE THE DATE:

Annual Recruitment Night

When: Wednesday, October 26, 2016
Where: Crowne Plaza in White Plains

Firms interested in participating e-mail Heather Oboda at: hoboda@citrincooperman.com for more information.

Mock interviews will be offered. Anyone interested in volunteering to perform mock interviews please e-mail Edward Wells at: ewells@pscpafirm.com
MARK YOUR CALENDARS:

THE ACCOUNTANTS IN INDUSTRY’S CPE EVENT

SURVIVING SALES TAX

When: Wednesday, September 21st
Where: Skadden Arps Slate Meagher & Flom LLP
360 Hamilton Ave 3rd FL, White Plains, NY
Time: 7:45 a.m. 9:00 a.m. (1 CPE)
Speaker: Mark Stone, CEO of Sales Tax Defense, LLC

Contact Michael Herz, michaelbherz@gmail.com for further information

SAVE THE DATE:

NextGen Hosted Wine Tasting to Benefit Blythedale Children’s Hospital

When: Thursday, November 3rd
Where: Willow Ridge Country Club
123 North Street, Harrison, NY
Time: 5:30 p.m. - 8:00 p.m.

Anyone interested in assisting to organize the event or interested in sponsoring or donating raffle items please contact Heather Oboda at: hoboda@citrincooperman.com
Chapter Committees and Major Events Planning 2016-2017
The Westchester Chapter has organized the following committees for the 2016 - 2017 fiscal year. Active committee service and participation is one of the most important ways you can contribute to the profession. Please take a few minutes to review the committees listed below, and contact the Chair/Co-Chair about becoming a member for any that spark your interest. It is never too late!

** ACCOUNTANTS IN INDUSTRY (formerly CFO Committee) -** A forum for NYSSCPA members who are senior financial executives in industry (CFO’s, Controllers, VP’s of Finance), to meet and exchange ideas and knowledge. Monthly informal hour-long breakfast sessions (3rd Wed)
Deborah Rubin, Co-Chair, drubin@lepatner.com
Michael Herz, Co-Chair, (914) 662-2525, michaelbherz@gmail.com

** ACCOUNTING CAREERS -** Make presentations to high school and college students; coordinate summer COAP Program; Administer Chapter's high school scholarship program.
Denise Stefano, Chair (914) 674-7779, dstefano@mercy.edu

** ACCOUNTING & AUDITING PRINCIPLES -** Primary focus is to discuss current accounting and auditing topics, conduct future CPA seminars and involvement in community and profession-related activities.
Denise Stefano, Co-Chair (914) 674-7779, dstefano@mercy.edu

** ESTATE AND FINANCIAL PLANNING -** One of the chapter’s most active committees. Annual conference, quarterly presentations and monthly breakfast discussion groups.
Robert L. Ecker, Co-Chair (914) 273-0777, RLE@Ecker-Law.com
Howard Klein, Co-Chair (914) 949-2990, HKlein@citrincooperman.com

** GOLF OUTING -** Help organize the annual outing. Major networking opportunity!
Jeffrey A. Schwartz, Chair, (914) 286-6908, jeff@stantonandleone.com

** GOVERNMENT RELATIONS -** Coordinate activities with the State Society and legislators as well as the IRS. To enhance government relations within our local region.
Bernadette Schopfer, Chair, (914) 644-9247 bhs@mgroupusa.com

** LOCAL PRACTITIONERS -** To coordinate monthly programs.
Stephen E. Franciosa, Co-Chair, sfranciosa@cpa.com
Catherine Censullo, Co-Chair, Catherine.Censullo@emcensullocpa.com

** PROFESSIONAL & COMMUNITY OUTREACH -** Join a group of Business professionals. Coordinate events during the year to promote professional and community relations.
Howard Klein, Co-Chair (914) 949-2990, HKlein@citrincooperman.com
Mark G. Leeds, Co-Chair (914) 468-7313, mleeds@winprop.com

** ANNUAL RECRUITMENT EVENT -** Coordinate annual event with local colleges, students and business people.
Michele Lazzara, Co-Chair (914) 909-3421, mlazzara@markspaneth.com
Heather Oboda, Co-Chair (914) 949-2990 x 3382 hoboda@citrincooperman.com
Denise Stefano, Co-Chair (914) 674-7779, dstefano@mercy.edu

** SPONSORSHIPS -** Coordinate with institutions who might sponsor Chapter events.
Richard Terrano, Co-Chair, (212) 330-6085, rterran@markspaneth.com

** TAX -** Coordinates 2 all-day tax conferences in the October/November and December months: the first on Small Business Taxes and the second on Individual Taxes. Committee also hosts monthly breakfast routine discussion/meetings.
Doug Ruttenberg, Chair, druttenberg@odpkf.com

** YOUNG CPAs NextGen -** Coordinate different events and outings during the year for Young CPAs.
Matthew Katz, Co-Chair (914) 949-2990, mkatz@citrincooperman.com
Edward Wells, Co-Chair: EWells@pscpafirm.com

We need your support and participation!!!
**2016-2017 CALENDAR**

<table>
<thead>
<tr>
<th>Date</th>
<th>Program/Activity/Event</th>
<th>Time</th>
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<tbody>
<tr>
<td>06/09/2016</td>
<td>Allied Professionals Networking Night on Alzheimer’s</td>
<td>5:30 p.m. - 9:30 p.m.</td>
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<tr>
<td>06/10/2016</td>
<td>16th Annual Estate, Tax &amp; Financial Planning Conference</td>
<td>8:30 a.m. - 5:00 p.m.</td>
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<tr>
<td>06/13/2016</td>
<td>Annual Golf Outing</td>
<td>All Day Event</td>
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<tr>
<td>06/20/2016</td>
<td>Organizational Meeting</td>
<td>5:30 p.m. - 8:00 p.m.</td>
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<tr>
<td>07/29/2016</td>
<td>Next Gen Food Bank Volunteering Event</td>
<td>1:00 p.m. - 3:00 p.m.</td>
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<tr>
<td>09/21/2016</td>
<td>Accountants in Industry CPE Event - Surviving Sales Tax</td>
<td>7:45 a.m. - 9:00 a.m.</td>
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<tr>
<td>10/26/2016</td>
<td>Annual Recruitment Night</td>
<td>TBD</td>
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<tr>
<td>11/03/2016</td>
<td>NextGen Wine Tasting Event to Benefit Blythedale Hospital</td>
<td>5:30 p.m. - 8:00 p.m.</td>
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**Future Board Meetings 2016**

(Board Meetings are generally the 3rd Thursday Morning of the month. Exceptions are noted)

**06/20/16 @ 5:30 p.m. (Organizational Meeting)**

Location: Ruth’s Chris Steakhouse

**Next Newsletter - September 2016**

**Happy Summertime! Enjoy the Warm Weather!**