A Message From The President

As we are now in the midst of the holidays, 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 reach all of the Chapter's goals and encourage the membership to get involved 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.

I would like to thank all the committee chairs for volunteering their time to administer countless committee meetings during the year. Your efforts continue to make the Nassau Chapter one of the most active local chapters in the NYSSCPA.

I hope all of you enjoyed our recent “Neturkeying” event, held on November 24 by the Attorney and Accountants Committee. It was nice to celebrate the Thanksgiving holiday with friends and colleagues, while networking for a good cause. The Accounting and Auditing all-day conference held on November 7 was also a huge success.

This month, the Taxation Committee will be holding its annual two-day event at the Long Island Marriott in Uniondale. The event, which is planned for December 5 and 6, will feature speakers such as Neil Katz, Joseph Endres, Eric Kramer, Jordan Linn, Mark Stone, Robert Barnett, Karen Tenenbaum, Jonathan Schwartz, and more.

Coming up in January 2016 is the Managing Partners Town Hall meeting and Ethics Update program at the Chateau Briand in Carle Place on January 13. The Accountants and Bankers Networking Meeting will be on January 20 at the Crest Hollow Country Club in Woodbury. This is a joint chapter meeting with the Suffolk and Nassau Chapters and a great example of cooperation between chapters to bring accountants and those we interact with together for a great event.

It is time to start planning the 2016 Installation Dinner, which is planned for May 25. There are discounted sponsorship rates available if placed between December and February. Please consider supporting the Chapter and taking advantage of the discounts while they are available.

I’d also like to take this time to remind you that our Executive Board will be meeting over the next month or so to prepare the Chapter fiscal budget for the year-ending May 31, 2017 and for the new slate of officers and board members. Chapter members will be able to vote on this at our Chapter meeting on January 20.

There will be many committee meetings this month, so please review the newsletter or visit our website www.nysscpa.org/nassau to find out everything that is going on. Please get involved and realize all the benefits that this chapter has to offer.

I’d like to take this time to again wish you all a Wonderful Holiday Season and Happy New Year. Please know you can reach out to me at any time with any issues or concerns that you may have. I’m happy to help in any way.

All the best for 2016,

Philip H. Kanyuk, CPA
NYSSCPA — Nassau Chapter President, 2015-2016
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Save the Dates:

DECEMBER 2015

Accounting & Auditing
Tuesday, 12/1
Accounting & Auditing Update
Marks Paneth, Woodbury
Dinner 6 PM
Presentation 6:30 PM

Real Estate Committee
Thursday, 12/3
Tax Planning for the Long Term Real Estate Investor
Milleridge Inn, Jericho
Dinner 6 PM
Presentation 7 PM

Taxation Committee
Saturday, 12/5 and Sunday, 12/6
All Day Taxation Conference
Federal & State Tax Update, Estate Planning, IRS & NYS Collections, Partnerships, S Corporations & LTC Insurance
L1 Marriott, Uniondale
9 AM to 5:15 PM

NASSAU CHAPTER
Tuesday, 12/8 and Thursday, 12/10
BLOOD DRIVE
12/8 - Margolin Winer & Evans
Garden City 10:45 AM to 4:45 PM
12/10 - Weiser Mazars
Woodbury 11 AM to 5 PM

CFO Committee
Thursday, 12/10
Fiduciary/Trustee Responsibility of 401K Plans
Nixon Peabody, Jericho
8 to 10 AM

Financial Literacy Committee
Wednesday, 12/16
Breakfast Meeting
Sanders Thaler Viola & Katz
Jericho
8 to 10 AM

Small Firm MAP Committee
Friday, 12/8
Expansion of Client Services
On Parade Diner
Woodbury
8 to 10 AM

JANUARY 2016

NASSAU CHAPTER
Wednesday, 1/13
Annual CPA Ethics Update
General Ethics
Chateau Briand, Carle Place
Managing Partners Meeting 4:30 PM
Cocktails 5:30 PM/Dinner 6:30 PM
CPE Only 6:45 PM

Financial Literacy Committee
Friday, 1/8
Garden City
7 PM
Volunteers Needed

CFO Committee
Thursday, 1/14
Financial, Legal & Practical Process of Selling a Company
Deboite, Jericho
8 to 10 AM

Small Firm MAP Committee
Friday, 1/15
Dress for Success & Healthy Eating
On Parade Diner
Woodbury
8 to 10 AM

Cooperation with Bankers & Credit Grantors
Wednesday, 1/20
Joint Nassau/Suffolk Chapter
Banker/CPA Networking Event
Crest Hollow Country Club
Woodbury
6 PM to 8:30 PM

Practice Continuity Committee
Friday, 1/22
Accounting Firm Mergers and Acquisitions
On Parade Diner
Woodbury
8 AM

Chapter Officials:

President
Philip H. Kanyuk, CPA

President-Elect
Lynee M. Fuentes, CPA

Vice President
Christine P. Hallahan, CPA

Secretary
Alex Resnick, CPA

Treasurer
Anthony Basile, CPA

Director (Past President)
Robert S. Barnett, CPA, Esq.

Directors
Kristina Albarella, CPA
Mark R. Cuccia, CPA
Mark Goldschmitt, CPA
Vivian Martinez, CPA
Jill Scher, CPA
Joshua S. Sechter, CPA
Cynthia Sze, CPA

Accounting & Auditing
Mark R. Cuccia, CPA
Mark Goldschmitt, CPA
Marcy Greenfield, CPA

Attorney & Accountants
Kristina Albarella, CPA
Anthony Basile, CPA
Jill Scher, CPA

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

Community Affairs & Public Relations
Kenneth Rick, CPA

Cooperation with Bankers & Credit Grantors
Neal Kornberg, CPA

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

Employee Benefits Committee
Michael J. Corkery, CPA
Tina M. Isbitsky, CPA

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

Like Us On Facebook
www.facebook.com/NYSSCPANassau

Connect With Us On LinkedIn
www.linkedin.com/groups?gid=5010322&mostPopular=true&trk=tyah&trkInfo=tas%3Anysscpa%20nassau
Profile Spotlight

Mark Cuccia

For Mark Cuccia, the desire to become an accountant began at William Floyd High School, where his “accounting teacher’s explanation of the subject, combined with the recollection of her career, solidified my aspirations,” he explains. “So much so that I immediately declared as an accounting major when I entered St. Joseph’s College as a freshman.”

Recently appointed as a Director of the Board of NYSSCPA – Nassau Chapter, Mark currently serves as Co-Chair of the Accounting & Auditing Committee and as Director of the Commercial Business Group at Marks Paneth LLP. In the latter position, he is responsible for overseeing all aspects of audit, review and compilation engagements, advising clients on accounting and tax issues and assisting clients with forecast and projection modeling. He works across a wide range of industries, including manufacturing, importing, distribution, wholesale and retail, restaurants and professional services industries.

With over 15 years of accounting experience under his belt, Mark says he was surprised to learn early in his career that “being an accountant doesn’t mean you’re just crunching numbers all day. It’s definitely not that stereotypical view that people have about accountants. There’s a lot of networking and interaction with business owners and client personnel of all levels. You really have to be a people person.”

As part of his responsibility with the Accounting & Auditing Committee, Mark helps organize and run events, and provides valuable input on the selection of speakers and topics. He feels the committee presentations are important to its members as it “alerts them to changes in current standards, as well as anything that may be on the horizon. Many attendees are sole practitioners or people working in private industry, so the Committee meetings allows them to have an open forum to ask questions and get detailed information. Since this is sometimes the only instance in which they meet with other accountants, it also provides a forum for them to gain insight as to how other practitioners are dealing with certain issues or implementing new standards.” Since being assigned to the Board in May 2015, Mark has had the added value within the Society to help determine the direction of the Chapter.

Mark initially joined the chapter on recommendation by one of his former colleagues, Cynthia Sze, an active chapter member who “told me it would help my career and allow me to network with other people in the industry.” For Mark, Cynthia’s advice was spot-on, “it has definitely expanded my networking base. It’s nice to be able to bounce ideas off colleagues from other firms. I’ve even gotten to build relationships with bankers and attorneys who work directly with our industries.”

For Mark, the decision he made in High School has definitely been worthwhile. “It’s a great field; there are a lot of opportunities for people with accounting degrees,” he explains. “A good accounting background can open the door to many career options – like running a business, becoming a partner in a firm, or even as the primary in-house financial consultant at a major corporation. My education definitely helped me know exactly what I wanted, it’s important to know what you’re looking for.”
Edward Mendlowitz, CPA and Partner at WithumSmith+Brown, gave a presentation at our October meeting on Succession and Retirement Planning for CPA Firms. Ed is a storyteller who delivers a message with each story. In the process, we learned lessons on the formation, development and transition of a CPA practice from a small firm owner’s perspective. For those of us who wish to continue practicing, Ed taught us how to grow and thrive. In the end, he taught us how “to be able to retire comfortably, at the right time, when you want to.” Ed has lived the professional experience that many of us strive to achieve and he continues to be productive and successful in his later years. Another message that many of us appreciated. Thanks again, Ed, for an inspirational presentation.

We’ve added to our future meeting schedule to include an additional speaker. On January 22, 2016, as originally scheduled, Bill Carlino will speak about the latest in accounting firm mergers and acquisitions. Bill joined Transition Advisors (a CPA mergers and acquisitions firm) after serving for nearly 12 years as Editor-in-Chief and Editorial Director of Accounting Today. While there, he was responsible for all content. During Bill’s tenure with the publication, Accounting Today won a number of financial journalism awards. He has also been a frequent industry speaker, presenter and panel moderator, having appeared as an expert commentator on such business channels as CNBC, Reuters, Bloomberg, CNN and National Public Radio.

Bill will be joined in this presentation by Philip Whitman, CPA, President and CEO of Whitman Business Advisors, LLC. Recently named by Inside Public Accounting as one of the Ten Most Recommended Consultants in the country, firms of all sizes rely on Phil every day. Phil and the Whitman Business Advisors team specialize in succession planning, mergers and acquisitions, strategic talent acquisition, practice management consulting, training and coaching and business development lead generation services. He will address these topics as they relate to practice continuity. Phil has authored articles and has been a featured speaker for state societies, international CPA firm associations and CCH’s annual user conference.

Our final meeting of the season will be held on April 29, 2016. Mark Perlson, CPA/PFS of Perlson LLP, will lead a panel of speakers on staff development, making them partners and solving the succession issue with home grown talent. Mark founded Perlson in 1985 as a small, two-person firm and it has since grown to become a significant multi-staff New York area firm, with an additional office in Charleston, South Carolina. Mark and his panel will provide insight into how to build a team capable of transitioning a CPA firm in succession.

Please see the coupon elsewhere in this newsletter to register for our January meeting and 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. For more information on our meetings or our Committee, contact us at ginette@morriscpas.com. We look forward to seeing you at a future event.

Craig Morris, Chairman
Looking for a few good volunteers...

You already know that the NYSSCPA — Nassau Chapter is committed to providing you with many events and activities to broaden your experiences in the profession.

Consider furthering the value of your membership by joining us on a committee.

**Employee Benefits**

The NEW Nassau Chapter Employee Benefits Committee holds meetings and events dedicated to improving practitioner knowledge of tax and attest services related to employee benefit plans.

The committee is just getting started and there are plenty of opportunities, so now’s a good time to get involved.

**To find out more about the Employee Benefits Committee, contact:**

Tina M. Isbitsky, CPA, CGMA  
631-406-4065  
tmicpa@gmail.com

**Sponsorship**

This vital committee allows the chapter to continue its good work. The Sponsorship Committee coordinates between the chapter and vendors who want access to our members and their guests at chapter events.

We are looking for committee members to work with existing sponsors or help find new sponsors and match them to our many events.

**To find out more about the Sponsorship Committee, contact:**

Joshua S. Sechter, CPA/ABV, CFE  
516-364-3232  
joshua@goKLG.com
Save The Date

Chartered 1953
NASSAU CHAPTER

63rd Annual
Installation Dinner

Wednesday, May 25, 2016
6:30 P.M.
Crest Hollow Country Club
Woodbury, NY
UPCOMING MEETINGS AND EVENTS

DISCOUNTED SPONSOR AND ADVERTISING RATES FOR THE

MAY 25, 2016, 63RD ANNUAL INSTALLATION DINNER

SIGN UP AND PAY BY DEC. 31, 2015
TAKE 20% OFF CONTRACT RATES

SIGN UP AND PAY BY JAN. 31, 2016
TAKE 15% OFF CONTRACT RATES

SIGN UP AND PAY BY FEB. 28, 2016
TAKE 10% OFF CONTRACT RATES

FOR DINNER SPONSORSHIP CONTRACT AND INFORMATION
CONTACT VIVIAN LEVY AT VIVIANLEVY1@GMAIL.COM
NYSSCPA-Nassau CFO Committee

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. Our monthly education topics are planned 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 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>
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<tbody>
<tr>
<td>12/10/15</td>
<td>Fiduciary and Trustee Responsibilities of 401k Plans</td>
<td>Jericho/Nixon Peabody</td>
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<tr>
<td>01/14/16</td>
<td>The Financial, Legal and Practical Process of Selling a Company</td>
<td>Jericho/Deloitte</td>
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<td>02/11/16</td>
<td>Estate Planning for the Closely Held Business</td>
<td>Melville/Marcum LLP</td>
</tr>
<tr>
<td>03/10/16</td>
<td>Banking Market Update</td>
<td>Jericho/Deloitte</td>
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<tr>
<td>04/21/16</td>
<td>Buy-Sell Agreements</td>
<td>Jericho/Deloitte</td>
</tr>
<tr>
<td>05/19/16</td>
<td>Internal Control/Fraud/Cyber Security Techniques</td>
<td>Jericho/Deloitte</td>
</tr>
</tbody>
</table>

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

MEETING TIME & FORMAT:
8 to 10 a.m. (two CPE credits)  light breakfast served  $10 meeting fee

MEETING LOCATIONS:
Jericho/Deloitte  2 Jericho Plaza, Jericho
Jericho/Nixon Peabody  50 Jericho Quad, Jericho
Melville/Marcum LLP  10 Melville Park Road

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

Please RSVP:
Email this form to:
aaronica@graphicpaper.com
Or fax this form to:
631-439-8822

CFO COMMITTEE MEETING RSVP
Meeting date: __________
Name: ________________________________________________________________
Firm: _________________________________________________________________
Address: ______________________________________________________________
Telephone: ____________________________________________________________
Email: ________________________________________________________________

UPCOMING MEETINGS AND EVENTS
A TECHNICAL MEETING
SPONSORED BY THE
ACCOUNTING & AUDITING
COMMITTEE — NASSAU CHAPTER

Tuesday, December 1, 2015

Guest Speakers: George Victor
Location: Marks Paneth LLP
88 Froehlich Farm Blvd., Woodbury, NY 11797
Time:
6:00 p.m. Dinner
6:30 p.m. Presentation
Course Code: To be obtained
CPE Credits: Two
Cost: $20 for Dinner and CPE Presentation
Topics: Accounting and Auditing Update

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 issues or circumstances that they have come across in the last few months. Our objective is to provide education and best practice guidance to the attendees, regardless of the size of their firm.

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

ACCOUNTING & AUDITING COMMITTEE
NASSAU CHAPTER
Accounting and Auditing Update
Tuesday, December 1, 2015

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

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

Wishing you Happy Holidays and a New Year filled with prosperity and success!

FINANCIAL LITERACY COMMITTEE
UPCOMING MEETINGS

WEDNESDAY, DECEMBER 16 AND WEDNESDAY, JANUARY 20
BREAKFAST MEETING: 8 TO 10 A.M.
SANDERS THALER VIOLA & KATZ
350 JERICHO TURNPIKE, SUITE 1
JERICHO, NY 11753

Please RSVP to Liz Oberg:
loberg@st-cpas.com

Wishing you Happy Holidays and a New Year filled with prosperity and success!
UPCOMING MEETINGS AND EVENTS

A TECHNICAL MEETING SPONSORED BY THE REAL ESTATE COMMITTEE

Moving the Real Estate Empire to the Next Generation
THURSDAY, DECEMBER 3, 2015

Speakers: Stephen M. Breitstone, Esq.
Mark E. Wilensky, Esq.
Meltzer Lippe, Goldstein & Breitstone, LLP

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

Designed for: Professionals involved in real estate engagements.

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

Topics:
The paradigm of moving the private real estate empire to the next generation has changed due to market conditions, as well as the tax and legislative environment. This presentation will take a fresh look at planning opportunities and challenges, and will explore planning techniques that are responsive to the changing environment.

Topics will include:
- How to maximize the basis step-up for appreciated real estate, while reducing estate taxes
- Whether assets in a grantor trust will get a basis step-up upon the death of the grantor
- Planning to maximize discounts
- Planning for liquidity and Section 6166 deferral of taxes
- A comparison of alternative techniques such as GRATS, installment sales to intentionally defective trusts and freeze partnerships under Section 2701

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

REAL ESTATE COMMITTEE EVENT
THURSDAY, DECEMBER 3, 2015
Milleridge Inn
585 Broadway, Jericho, NY 11753

MAIL TO:
Joel Dressner, CPA
c/o Gettry Marcus CPA, P.C.
88 Froehlich Farm Blvd., 3rd Floor
Woodbury, NY 11797
Tel: (516) 364-3390 ext. 232
Fax: (516) 496-0417
Email: jdressner@gettrymarcus.com

☐ I will attend dinner and the CPE presentation at 6 p.m. and I have enclosed a check for $________ at $45 per person, payable to the NYSSCPA — Nassau Chapter.

☐ I will attend the CPE presentation only at 7 p.m. and I have enclosed a check for $________ at $20 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 (Print) ______________________________________________________
Firm _____________________________________________________________
Firm Address ______________________________________________________
City __________________________ State ___________ Zip_________________
Telephone _________________________________________________________
Cell Phone ________________________________________________________
Email ____________________________________________________________
Signature _________________________________________________________

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

Presented by the Nassau Chapter Taxation Committee New York State Society of Certified Public Accountants

Nassau Chapter 63rd Annual All-Day Tax Conference

Saturday, December 5, 2015
or
Sunday, December 6, 2015

Long Island Marriott Hotel & Conference Center
101 James Doolittle Boulevard, Uniondale, NY
9 a.m. to 5:15 p.m. (check-in begins at 8:30 a.m.)

CONFERENCE AND COMMITTEE CHAIRPERSONS:
Robert J Schaffer, CPA, Castellano, Kornberg & Co., CPAs, PC
Robert S. Barnett, CPA, Esq., Capell Barnett Matalon & Schoenfeld LLP
Iola Damante, CPA, Raich Ende Malter & Co. LLP

CONFERENCE TOPICS & SPEAKERS

Topics
• Federal and New York State Tax Updates
• IRS & NYS Tax Collections
• Estate Planning
• Partnerships
• S Corporations
• Tax & Financial Considerations of Long-Term Care Insurance

Speakers
• Neil Katz, Esq., Katz, Bernstein & Katz, LLP
• Joseph Endres, Esq., Hodgson Russ LLP
• Karen Tenenbaum, Esq., LLM, Tenenbaum Law, PC
• Yvonne R Cort, Esq., Tenenbaum Law, PC
• Eric M Kramer, CPA, Esq., Farrell Fritz, PC
• Jordan S. Linn, Esq, Farrell Fritz, PC
• Mark Stone, CPA, Stone & Associates
• Robert S Barnett, CPA, Esq., Capell Barnett Matalon & Schoenfeld LLP
• Stuart Schoenfeld, Esq., Capell Barnett Matalon & Schoenfeld LLP
• Jonathan Schwartz, New York Life Insurance Company

PROGRAM DETAILS

Designed for: Professionals with a basic knowledge of taxation.
Objective: To update participants on the impact of recent tax legislation and to provide practical applications in compliance.

COURSE DETAILS:

Time: 9 a.m. to 5:15 p.m.
(check-in begins at 8:30 a.m.)
Course Level: Update
Prerequisite: None
Method of Presentation: Lecture
Field of Study: Taxation

Recommended CPE Credit Hours: 8
Developer: Foundation for Accounting Education
Course Code: 28603623 (December 5)
28603624 (December 6)
Member Fee: $175
Nonmember Fee: $250

Register online at www.nysscpa.org
Register by fax at (866)495-1354 | Register by phone at (800) 537-3635

www.nysscpa.org
NYSSCPA – NASSAU CHAPTER

Blood Drive

Tuesday, December 8, 2015
Margolin Winer & Evens: Busmobile
400 Garden City Plaza, Garden City
10:45 a.m. to 4:45 p.m.
Contact Nancy Shapiro at 516-747-2000, ext. 4437 or nshapiro@mwellp.com

Thursday, December 10, 2015
WeiserMazars LLP: Busmobile
60 Crossways Park Drive West, Woodbury
11 a.m. to 5 p.m.
Contact John Barone at 516-620-8508 or john.barone@weisermazars.com

Your donation will help to save up to THREE lives.
Our community hospitals need your help. Please share this lifesaving gift!

Eligibility Criteria:
Bring ID with signature or photo.
Minimum weight 110 lbs.
Age 16 to 75 (16 year olds must have parental permission; age 76 and over need doctor’s note)
Eat well (low fat) and drink fluids
No tattoos for past 12 months
For questions concerning medical eligibility, call 1-800-688-0900.

Long Island Blood Services

*If you wish to donate at another location please be sure to use group #9579
UPCOMING MEETINGS AND EVENTS

NYSSCPA — NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE MEETING
DECEMBER 18, 2015

TOPIC: EXPANSION OF CLIENT SERVICES

- Estate Planning
- Tax Planning
- Retirement Planning
- College Planning
- Family Office Work
- Succession Planning for CPAs and Clients
- Various Services
- Forensic Services
- State/Local Tax Services
- Tax Resolution
- Assurance Services
- AND MORE!

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

CPE: 2 Credits Pending

Time: 8 to 10 a.m. (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 – No Exceptions

Checks are payable to:
NYSSCPA — Nassau Chapter

Chairpersons: Scott Sanders, CPA, PFS, CGMA, CFP*, CFS
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.
### Small Firm MAP Meeting Topics 2015-2016*

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Speaker/Moderator</th>
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<tbody>
<tr>
<td>Friday, December 18, 2015</td>
<td>Expansion of Client Services</td>
<td>Scott Sanders, CPA, PFS, CGMA, CFP*, CFS</td>
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<td>Eliot Lebenhart, CPA</td>
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<td>Kenneth Hauptman, CPA</td>
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<td>Alex Resnick, CPA</td>
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<tr>
<td>Friday, January 15, 2016</td>
<td>Dress for Success &amp; Healthy Eating Part I</td>
<td>Janine Giorgenti — Giorgenti Custom Menswear</td>
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<td>Carmela Frattasi — Corporate Wellness</td>
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<td>Friday, February 19, 2016</td>
<td>Pre-Tax Season Issues — Roundtable Discussion</td>
<td>Scott Sanders, CPA, PFS, CGMA, CFP*, CFS</td>
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<td>Eliot Lebenhart, CPA</td>
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<td>Kenneth Hauptman, CPA</td>
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<td>Alex Resnick, CPA</td>
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<td>March 2015 — No Meeting - Tax Season</td>
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<tr>
<td>Wednesday, April 20, 2016</td>
<td>Post-Tax Season Issues — Roundtable Discussion</td>
<td>Scott Sanders, CPA, PFS, CGMA, CFP*, CFS</td>
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<td>Eliot Lebenhart, CPA</td>
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<td>Alex Resnick, CPA</td>
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<tr>
<td>Wednesday, May 18, 2016</td>
<td>10 Ways to Lose a Client</td>
<td>Scott Sanders, CPA, PFS, CGMA, CFP*, CFS</td>
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<td>Eliot Lebenhart, CPA</td>
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<td>Alex Resnick, CPA</td>
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<tr>
<td>Wednesday, June 15, 2016</td>
<td>Labor Law Update</td>
<td>Ruth Kraft, Esq., Barlett, McDonough &amp; Monaghan, LLP</td>
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</tbody>
</table>

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

Time: 8 to 10:00 a.m. (breakfast included)

Paid in Advance: $25
Cost: $30 for pre-registration, paying at the door — no exceptions

You Can Contact Your Co-Chairmen as Follows:

Scott Sanders, CPA, PFS, CGMA, CFP*, CFS 516 938-5219
Eliot Lebenhart, CPA 516 938-5219
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.*
THE FINANCIAL LITERACY COMMITTEE

WE ARE SEEKING VOLUNTEERS FOR AN EVENT THAT WE ARE PARTICIPATING IN ON FRIDAY, JANUARY 8, 2016 IN GARDEN CITY AT 7 P.M.

ANY INTERESTED MEMBERS, EXPERIENCED OR NOT, CAN CONTACT NAOMI WATTS NWATTSCPA@YAHOO.COM OR JARRED BERMAN JRB@OSYB.COM

VOLUNTEERS NEEDED
UPCOMING MEETINGS AND EVENTS

NYSSCPA — NASSAU CHAPTER
Annual CPA Ethics Update

January 13, 2016
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, 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.

Place:
Chateau Briand
440 Old Country Road
Carle Place, NY 11514

Managing Partners Meeting: 4:30 p.m.
Cocktails: 5:30 p.m.
(check-in begins at 5 p.m.)
Dinner: 6:30 p.m.
CPE only: 6:45 p.m.
(check-in begins at 6:30 p.m.)

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: 42032615
CPE Credits: 2
Member: $10
Nonmember: $20

To register for cocktails and dinner and CPE session:
Course Code: 42032625
CPE Credits: 2
Member: $70
Nonmember: $80

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

Please join us for this exciting event!

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

NOTE: YOU MUST PREREGISTER TO RECEIVE THE PROGRAM MATERIALS
Program materials will only be provided in electronic format to those who preregister. Hard copy material will not be provided at the program. Those not registered may not be allowed to attend the CPE presentation if the program sells out and will not be provided with the program materials until after the presentation.

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

☐ 42032625 - I will attend cocktails and dinner and CPE presentation at 5:30 p.m. (check-in begins at 5 p.m.)

☐ 42032615 - I will attend the CPE presentation only at 6:45 p.m. (check-in begins at 6:30 p.m.)

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

Name: _______________________________________________
Firm: ________________________________________________
Address: _____________________________________________
______________________________________________________
Telephone: ___________________________________________
Fax: __________________________________________________
Email: _______________________________________________
# NASSAU CHAPTER ALL-DAY ESTATE AND PERSONAL FINANCIAL PLANNING CONFERENCE

**SPONSORED BY NYSSCPA – NASSAU CHAPTER**

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<tr>
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**Firm Address:**
City __________________________ State ___________ Zip_________________

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**Email address required in order to receive course material.**

- **Check One:**
  - [   ] Member Fee: $150
  - [   ] Nonmember Fee: $250

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Card Holder's Signature ________________________________________

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**NASSAU CHAPTER ALL-DAY ESTATE AND PERSONAL FINANCIAL PLANNING CONFERENCE**

**DATE:** SATURDAY, JANUARY 16, 2016  
**TIME:** 9 A.M. TO 5 P.M.  
**NETWORKING AND BREAKFAST AT 8:30 A.M.**  
**PLACE:** TO BE DETERMINED  
**COURSE CODE:** TBD

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

**Topics and Speakers:**
- “Elder Law & Medicare Update” — Lawrence E. Davidow, JD; Davidow, Davidow, Siegel & Stern, LLP
- “Estate Planning Update” — Eric Kramer, CPA, JD; Farrell Fritz, PC.
- “A Financial Planner's Guide to Seeing a Client's Closely Held Business Survive Death or Disability” — Bob Barnett, CPA, JD; Capell, Barnett, Matalon & Schoenfeld LLP
- “The Ins and Outs of Grantor Trust Rules” — Jordan Linn, JD; Farrell Fritz, PC.
- Q & A Panel Discussion. Have your questions ready!

**Additional topics and presenters to be announced:**
- Post Mortem Estate Planning: Life Insurance Techniques, Traps and Planning; Estate Litigation; Decanting; Understanding Trust Documents — Key Points, Charitable Planning

**Conference Committee & Chairpersons:**
- Christine Hallahan, CPA  
- Eric Kramer, CPA, Esq.; Farrell Fritz, PC.  
- Scott Sanders, CPA, PFS, CFM, CFM; Sanders, Thaler, Viola & Katz, LLP  
- Stuart Shapiro CPA, PFS; Shalik, Morris & Company, LLP

Register online at [www.nysscpa.org](http://www.nysscpa.org)  
Or mail your payment and registration form to:  
Foundation for Accounting Education  
P.O. Box 10490, Uniondale, NY 11555-0490  
Fax it to: (866) 495-1354 | Phone (212) 719-8383 or (800) 537-3635

Credit card information must accompany all fax, phone, and online registrations. Please be sure to type or print clearly when faxing. Walk-ins: All individuals who register on the date of the program will be charged an additional $25 fee.

**Registration Information**

How To Register: Simply complete the attached registration form in full and return it with full payment by mail or fax. Or phone or register online at www.nysscpa.org. Registration forms may be photocopied, but please use a separate form for each registrant. Payment may be made by check or may be charged to American Express, MasterCard, Visa, or Discover. All registrations must be received 14 days prior to the event in order to guarantee a seat and course materials. Participants with special requirements should notify FAE staff at least 14 days in advance of the event. Refund, transfer, walk-in, and cancellation: Fee policies are available for review at www.nysscpa.org. Mandatory Continuing Education Requirement: This program complies with the standards set forth by the New York State Education Department for mandatory continuing education for CPAs. FAE’s New York State CPE sponsor number is 000372; New Jersey 20CE0022200; Pennsylvania PX 177239. © 2014 Foundation for Accounting Education.

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Chartered 1953  
**NASSAU CHAPTER**  
www.nysscpa.org
UPCOMING MEETINGS AND EVENTS

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

WEDNESDAY, JANUARY 20, 2016
CREST HOLLOW COUNTRY CLUB – WOODBURY, NY
6 TO 8:30 P.M.
NETWORKING, COCKTAILS, BUFFET DINNER

$60 in advance; $70 walk-in at the door (not pre-registered)
Cash or check only; credit cards not accepted

RSVP REQUIRED BY JANUARY 15, 2016
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: __________________________________________________________________________
City, State, Zip: _____________________________________________________________________
Telephone: ___________________________ Email: ___________________________
I am a: ______ CPA ______ Banker ______ Other
Number of People attending _________ Enclosed Amount $ _______

Please make checks payable to: NYSSCPA – Nassau Chapter
Mail to: Neal Korenberg, CPA
Castellano, Korenberg & Co., CPA’s, P.C.
313 W. Old Country Road, Hicksville, NY 11801

Questions: Phone (516) 937-9500
Fax (516) 932-0485
Email to: cpinto@ck-co.com

Additional Attendees: ____________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
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 a.m.

___ Enclosed is my check for $ ___ at $25 per person
   (must be received by noon, Thursday, January 21)

___ I prefer to pay $ ___ at $30 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.

Name: ________________________________________________________________
Firm: _________________________________________________________________
Address: ______________________________________________________________
Telephone: ___________________________________________________________
Email: _______________________________________________________________
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 up 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
☐ Attorney & Accountants
☐ CFO & Financial Executives
☐ Community Affairs & Public Relations
☐ Cooperation with Bankers & Credit Grantors
☐ Cooperation with Educational Institutions
☐ Employee Benefits
☐ Estate & 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:
Lynne Fuentes, CPA
307 Hicksville Road, Bethpage, NY 11714
lynnefuentes@optonline.net | Tel: 516-622-3045

Advertising Opportunities

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

e-mail: vivian levy1@gmail.com

Like Us On Facebook
https://www.facebook.com/NYSSCPANassau

Connect With Us On LinkedIn
http://www.linkedin.com/groups?gid=5010322&mostPopular=&trk=tyah&trkInfo=tas%3Anysscpa%20nassau

SPONSORSHIP

If you wish to sponsor any Nassau Chapter or committee event, contact:

Vivian Levy
c/o Sanders Thaler Viola & Katz, LLP
350 Jericho Turnpike, Suite 1
Jericho, NY 11753
Phone: (516) 938-5219 | Fax: (516) 938-0491
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. (516) 931-8100
- Jack Angel, CPA (516) 656-0800
- Robert Lusthaus, CPA, Esq. (516) 937-1366
- Robert J. Schaffer, CPA (516) 937-9500

**Taxing Authorities**
- Ruth Sattig Betz, CPA (NYS) (516) 249-1919
- Karen J. Tenenbaum, Esq. (631) 465-5000
- 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

### Newsletter Committee

**Newsletter produced by**
The Public Relations and Marketing Group
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Jericho, NY 11753
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vivianlevyl@gmail.com

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

The newsletter is downloadable at:

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**NYS Society of Certified Public Accountants CHANGE FORM**

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| 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