As we recover from feeling as stuffed as the bird that we just ate a week ago, I hope you all had a wonderful Thanksgiving surrounded by family and loved ones.

It seems everyone is always busy with the holidays, which is why I have to give a special thanks to all of our officers, directors, and committee chairs at this time of year for the incredible number of hours that they have put in, to present all of the events that our chapter runs in November, December, and January. Their time and dedication is what continues to make the NYSSCPA — Nassau Chapter the best and most active chapter in the state society.

In addition to all of our usual committee events, November had three of our largest events of the year.

The all-day Accounting and Auditing conference which is presented jointly with the Suffolk Chapter was held on November 9 at the Radisson Hotel in Hauppauge; a big thank you to all of our presenters and to the committee chairs from both Chapters for all your time and effort.

On Wednesday, November 14, we held our third annual Student CPAFest at the Chateau Briand. We had around 150 students attend from colleges all over Long Island, NYC, NJ and CT, as well as 15 different firms recruiting. Every year this event has been a great success and just continues to grow.

On November 27, we had our Attorney & Accountant Mixer at the Fox Hollow Inn. This year we collected food donations for the Interfaith Nutrition Network (INN) and raised money for Family Residences and Essential Enterprises Inc. (FREE). It was a great night of networking, and more importantly, fund raising for great causes. The musical performance by the residents of FREE was heartwarming, as could be seen by how generous our members became following the performance.

In December, we have our Annual All-Day Tax and Financial Planning Conference followed by 5 more committee events to help you with all your year-end planning, and to gear up for tax season. Please make sure to check our calendar for full details, including times and locations.

We kick off the New Year on January 9, with our Annual Town Hall and Managing Partners meeting to be followed by our 2-credit ethics update. Last year over 150 people joined us for the ethics session along with networking, cocktails, and dinner. Managing partners, if you would like to join us for the managing partners meeting, please reach out to myself or our President-elect Natalie Verbanac. We will also be electing our Nominating Committee at this meeting. They will be responsible for preparing a slate of proposed officers and directors for the 2019/2020 term.

The very next night, January 10, is our Woman’s Focus Group Holiday Party at the Garden City Hotel, a special evening of networking for women with other female professionals.

January 31 will be our Joint Networking Event with the Suffolk Chapter, Networking with Accountants, Bankers, and other Professionals. An evening to unwind and enjoy before Tax Season hits us again.

Last, but certainly not least, please mark your calendar for our 66th Annual Installation Dinner on Thursday, May 30, 2019 as we will be installing my successor Natalie Verbanac as President of the Nassau Chapter. Sign up now for sponsorship opportunities and take advantage of our early sign-up discounts.

On behalf of the entire board of the Nassau Chapter, I wish you a very wonderful Holiday and a Happy New Year.

As always please feel free to email me at aresnick@wmrcpa.com with any questions, thoughts or concerns that you have regarding our chapter.

Best Regards,

Alex Resnick
NYSSCPA Nassau Chapter President 2018-2019
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Save the Dates:

DECEMBER 2018

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<th>Event</th>
<th>Date</th>
<th>Details</th>
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<tbody>
<tr>
<td>Accounting &amp; Auditing</td>
<td>Tuesday, 12/4</td>
<td>Accounting &amp; Auditing Update Marks Paneth, Woodbury 6:00 – 6:30 PM Dinner 6:30 – 8:10 PM Presentation</td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Thursday, 12/14</td>
<td>Tax Update Deloitte, Jericho 9:00 AM – 2:00 PM</td>
</tr>
<tr>
<td>Small-Firm MAP</td>
<td>Friday, 12/14</td>
<td>Small-Firm MAP On Parade Diner, Woodbury 8:00 – 10:00 AM</td>
</tr>
<tr>
<td>Management of Accounting Practices</td>
<td>Wednesday, 12/19</td>
<td>Management of Accounting Practices Topic TBD Grassi &amp; Co., Jericho 8:00 AM</td>
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</table>

JANUARY 2019

<table>
<thead>
<tr>
<th>Event</th>
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<th>Details</th>
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<tbody>
<tr>
<td>NextGen Committee</td>
<td>Tuesday, 1/8</td>
<td>Networking in the New Year Round 1 Entertainment, Hicksville 6:00 - 9:00 PM</td>
</tr>
<tr>
<td>Small-Firm MAP</td>
<td>Friday, 1/18</td>
<td>Small-Firm MAP On Parade Diner, Woodbury 8:00 – 10:00 AM</td>
</tr>
<tr>
<td>Practice Continuity Committee</td>
<td>Friday, 1/25</td>
<td>Solutions to Cybersecurity Risks On Parade Diner, Woodbury 8:00 AM</td>
</tr>
<tr>
<td>Women’s Focus Group</td>
<td>Thursday, 1/10</td>
<td>Women’s Focus Group Chateau Briand, Carle Place Managing Partner Mtg 4:00 – 5:00 PM Cocktails, Dinner, CPE 5:30 – 9:00 PM</td>
</tr>
<tr>
<td>Ethics Update</td>
<td>Wednesday, 1/9</td>
<td>Ethics Update Managing Partner Mtg 4:00 – 5:00 PM Cocktails, Dinner, CPE 5:30 – 9:00 PM</td>
</tr>
<tr>
<td>Networking with Accountants</td>
<td>Thursday, 1/31</td>
<td>Networking with Accountants Joint Nassau/Suffolk Networking Event The Fox Hollow, Woodbury 6:00 – 9:00 PM</td>
</tr>
<tr>
<td>Network Highlights</td>
<td>Wednesday, 1/10</td>
<td>Networking Event Garden City Hotel, Garden City 6:00 – 9:00 PM</td>
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<tr>
<td>Joint Nassau/Suffolk</td>
<td>Wednesday, 1/10</td>
<td>Joint Nassau/Suffolk Networking Event Garden City Hotel, Garden City 6:00 – 9:00 PM</td>
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Nassau Chapter 66th Installation Dinner - May 30, 2019 See Flyer in Newsletter on page 8
Jan Herringer, CPA, National Assurance Partner for BDO USA, LLP and President of the NYSSCPA, has always been a self-determined person as well as a role model for women in her field. Whether it was achieving her Masters in Economics from The New School after graduating with a BA in Economics from SUNY Cortland, or when she then went on to receive her MBA in Accounting from Baruch College at the Zicklin School of Business, Jan has always been driven to accomplish her goals with fierce determination. Looking back at the cultural circumstances that she and other women faced at the time only underscores her accomplishments even more.

“1975 was a very informative time to be a woman. I’ve always been very independent and have always told my children, don’t let other people tell you what you can and cannot do, and that is how I have conducted my professional life. So, growing up in that time period impacted me.” Luckily, she had her mother to look to as a role model. Her mom worked diligently at multiple jobs and still found time to volunteer in several capacities, including heading up Jan’s Girl Scout troop. Jan saw her achievements and mindset as an example of how she could live her own life.

At school, she lived in a kind of egalitarian bubble, so she didn’t feel the impact of what life would truly be like for a woman outside of that safe environment. “While you were there, you thought you could do whatever you wanted to do, but when you graduated, the business world was a bit different.”

“Being involved in sports in high school and college was always an interest and helped build confidence and a spirit of working within a team to accomplish goals. When I was in high school, Title IX wasn’t even in effect. So now, to see all the advantages women have, is wonderful.”

Jan’s ambition was ever-present but her desire to work in economics waned. After her employment at a research firm in the field felt less than satisfying, she realized that economics wasn’t for her. “It just got very esoteric, and since I am a practical person by nature, I think I needed something more concrete.” Her study of and work in accounting then led her to take on more of a leadership role, instead of a more typical number-crunching one: “People always say that you have to be good at math to be an accountant, and I was always good at math, but what I do now is all about writing and communicating with people. There are so many skill sets required in the field, not just a knowledge of numbers. Actually I’m not that great at math anymore and when I tell that to people they laugh.”

Her great strengths lie in both her leadership abilities and talent in communication. And these skill sets have led to her principal positions as both Partner at BDO and as President of the NYSSCPA. Rising to the level at Partner
at BDO was, for Jan, the result of hard work, but also something more: “It was the outcome of hard work but also, an important aspect is in being able to network and promote yourself. And I had an opportunity by working in National Assurance. The team recognized my interest in auditing standards and when I then promoted my interest in leadership, it all came together and I became a Partner.”

At BDO, Jan specializes in auditing and reporting and is responsible for ensuring firm compliance to auditing standards as part of the National Assurance practice, through review, development and updates of methodology. She is also involved in the standard-setting processes, by creating content for internal and external publications regarding auditing and reporting matters. Jan is a Board Member of the AICPA Auditing Standards Board and previously served as Technical Manager in the Professional Ethics Division of the AICPA.

Her main focus is now on the NYSSCPA Women’s Leadership Forum—the first of its kind in the Society—which is due to take place on January 18. The forum is titled *Transforming Workplace Culture* and that is just what it sets out to do. Jan is very excited about its outcome: “This is something that I’ve wanted to do since I became President-Elect. This forum will be unique in that we are trying hard to get men to participate in the day. We have chosen a number of speakers to address just how to mentor women from both the male and female perspective, and to teach women that to get ahead they have to have mentors who are both men and women.”

“At the moment, the field is dominated by men, so women have to know how to interact and learn from the leaders in their company, who are mostly men.” Speakers represent leadership in many fields and include Michele Meyer-Shipp, Esq., Chief Diversity Officer at KPMG; Brad Johnson, author of *Athena Rising*; Lilly Ledbetter of the 2009 Equal Pay Act; as well as Jan herself.

Jan is hoping that the forum will be a yearly event. Right now the focus is on women but that might change going forward. There are plans in the works to address diversity issues for women, people of color and other underrepresented groups as well. “I can see the scope expanding in the future,” explains Jan. “We already have a Diversity Committee in the Society and they have helped us in moving forward. I can see that committee carrying on with this in future years.”

In addition to her work on the Women’s Leadership Forum, Jan is involved in the 30% Club, which is a collective of companies who have come together in the goal to obtain 30 percent representation of women on their boards.

Going forward, Jan sees that the best way to bridge a gap to the next generation is through mentorship. She is in the middle of visiting each of the 15 NYSSCPA chapters, to discern just how to implement this program, and is excited at the prospects she sees.

“What I see as a great way to bridge the gap between those who are younger and older is in the State Society having a mentorship program. I think that is a great way for the more experienced professionals to share their perspectives and ideas and to get younger people involved and excited…”

“What I see as a great way to bridge the gap between those who are younger and older is in the State Society having a mentorship program, now called the Mentor Match program. I think that is a great way for the more experienced professionals to share their perspectives and ideas and to get younger people involved and excited, as well as provide them leadership opportunities. I truly believe that a mentorship program is the best way to bridge this gap.”

Her own future looks to be one of less responsibility and more relaxation. Jan is due to retire in June of next year, but will continue to consult in her field. She also looks forward to gardening, long hikes and to simply spending time out of doors with friends and family.

As she recently spoke to one of her mentees about the fact that she was retiring, her colleague’s face lit up, as did Jan’s. It has been a journey, Jan realized, when looking back at her career. And it is one that has helped many women in her field in the present day, but that will also help those going forward, in generations to come.
The Accounting & Auditing Committee has one main goal—to be the go-to resource for their members. According to Mark Cuccia, CPA, Co-Chair of the group, as well as Secretary and Board Member of the NYSSCPA’s Nassau Chapter, “they strive to be a platform for people to hear relevant speakers and get answers on any topics they might have questions on. We want them to be able to bounce ideas off of us and receive help where needed. Someone might be dealing with very difficult issues and hopefully they can ask one of us or any of our speakers to help them resolve that issue.”

“The committee’s primary focus is on anything related to the areas of both accounting and auditing and especially on keeping our members updated on any new standards that affect these areas.” And this committee does handle all areas and practice sizes in the field. “It could be a sole practitioner we’re helping,” says Mark, “a two-man firm, or one as big as Marks Paneth. We want to help every firm in any way possible.”

Mark Cuccia, CPA, Director at Marks Paneth LLP, shares his Co-Chair responsibilities with Tina Fasano, CPA, and Franco Martorana, CPA, both Supervisors at Marks Paneth. Mark works in the commercial business group and mainly focuses on audits of financial statements, managing staff and dealing with clients. Franco is in the real estate group out of Long Island and supervises staff on audits, reviews and compilations. His areas of expertise lie with textile companies, home security and home heating oil companies, and with manufacturing industries.

Tina is a supervisor in the commercial businesses group, a group that encompasses retailers, commercial businesses and manufacturers. She provides staff leadership on engagements and in dealing with clients, focusing on the attest side and in auditing financial statements. The fact that all three work together in one firm makes co-chairing the Accounting & Auditing Committee that much easier.

Their involvement came about pretty organically. Mark was already involved, for at least five years, and then recruited Tina soon after. Two years ago, they recruited Franco. Since they all work in auditing, the committee was a natural fit for all three. And they share responsibilities equally on the committee as well. “We all have the same role as Co-Chairs,” says Tina. “That includes organizing the meetings, dealing with the venues, focusing on finding topics and recruiting speakers for events. We share the responsibilities involved in each of the events.”

“The events are mainly technical ones,” says Mark, “to qualify for CPE. They all cover topics related to accounting and auditing. We discuss accounting pronouncements that might be brand-new or ones from earlier years that are still being implemented, so we figure out how to continue to implement those new standards.”

Each year, they hold a big joint event with the Suffolk County Chapter of the NYSSCPA. This past month, on November 9, they hosted an all-day accounting and auditing conference, held...
at the Radisson Hotel in Hauppauge. Five different topics were discussed, with multiple speakers covering aspects of each topic. The event began at 8:30AM and ran all day.

“We like doing joint events with the Suffolk Chapter,” says Mark. “It boosts attendance and provides a larger base for our events. Also, attendees receive eight CPE credits all at once and we are able to host a larger amount of speakers. Our individual committee meetings are usually smaller.”

The committee’s last event of the year, the Accounting and Auditing Update, is to be held at the Marks Paneth office on December 4 from 6pm to 8pm and qualifies for two CPE credits.

In each endeavor we take on in life, there are always both challenges and rewards, and co-chairing this vital committee is no exception. Franco feels that one particular challenge involved is in simply getting people to show up: “Our biggest challenge,” says Franco, “is in getting attendance. We do have a lot of sole practitioners attending and we love that. So now we are also trying to get, CFOs, controllers and the next generation of accountants to come. The challenge we’re facing this year is that if you’re a member of the Society you can now get CPE online through that membership, so we’re seeing a lot less people attend who are just doing CPE on their own time. Also, a lot of bigger firms offer CPE in-house, so some firms won’t pay for CPE at our events, especially if they can cover it on their own.”

According to Tina, one of the biggest rewards of Co-Chairing this committee is truly for their own education: “It’s really important for us to learn about the new topics we are bringing forward—it keeps us updated as well.”

Mark feels that the biggest reward in attending and hosting these events is in meeting new people. “I love networking with fellow practitioners and also being able to answer their questions. I like getting members through an issue, answering their technical questions, or even in helping them to see a different perspective. It’s rewarding for me to help others.”

Going forward, Mark hopes that the committee can be even more of a help to the CPA community. “The standards in our industry are getting more and more complex, so we want to be a gathering place to exchange ideas, to be a place of learning, and an encouragement in growth. There is always more than one way to see how things are handled in certain areas of accounting and auditing.”

Franco said it best in that “it’s a challenge getting the next generation to come. But there are different ways to get them involved, either by helping them to become a Co-Chair or by suggesting they simply attend events. Getting them to attend networking events is definitely a good way to do that. And using our events as a stepping-stone can give them the confidence to then go on to attend other events or chair a committee.”

So what would be one word of advice the Accounting & Auditing Committee would offer to others in their field, to further their future knowledge and success? Tina knows: “Get involved!”

“IT’S REALLY IMPORTANT FOR US TO LEARN ABOUT THE NEW TOPICS WE ARE BRINGING FORWARD—IT KEEPS US UPDATED AS WELL.”

— TINA FASANO, CPA CO-CHAIR

“We DO HAVE A LOT OF SOLE PRACTITIONERS ATTENDING AND WE LOVE THAT. SO NOW WE ARE ALSO TRYING TO GET CFOS, CONTROLLERS, AND THE NEXT GENERATION OF ACCOUNTANTS TO COME.”

— FRANCO MARTORANA, CPA CO-CHAIR
Look for our 2018-2019 Sponsorship Opportunities coming soon.

SPACFOR RENT

Woodbury Professional Office – Perfect for CPAs, EAs, Attorneys or other Professionals!

New, contemporary offices are now available for rent within Woodbury CPA firm. Amenities include reception services, conference room usage, kitchen, phone, internet, cable, copy and fax machines.

Offices from $1,200 – $2,500, workstations also available.

Please contact Craig at (516) 364-8888 for more information.

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. Please consider furthering the value of your membership by joining us on a committee. See the Committee Service Application on the next to last page of the newsletter.

We are looking for people to chair our Community Affairs and Public Relations Committee. That committee has spearheaded the annual Ellen Gordon Walk/Run, blood drives, etc.
66th Annual
Nassau Chapter
Installation Dinner
Thursday, May 30, 2019 | 6:30 p.m.
Crest Hollow Country Club, Westbury

Come Celebrate the 66th Anniversary of the Nassau Chapter

Sponsor & Advertising Discounts Available through March 15, 2019
20% through 1/15/19 • 15% through 2/15/19 • 10% through 3/15/19

- **PLATINUM SPONSOR: $2500**
  - Recognition on the podium
  - Full-page ad in event program
  - Ten (10) tickets to the event*
  - Signage at the event

- **GOLD SPONSOR: $2100**
  - Recognition on the podium
  - Full-page ad in event program
  - Eight (8) tickets to the event*
  - Signage at the event

- **SILVER SPONSOR: $1600**
  - Recognition on the podium
  - Half-page ad in event program
  - Six (6) tickets to the event*
  - Signage at the event

- **BRONZE SPONSOR: $1000**
  - Recognition on the podium
  - Quarter-page ad in event program
  - Four (4) tickets to the event*
  - Signage at the event

- **WINE SPONSOR: $300**
  - Recognition in event program
  - Signage on every table

- **COCKTAIL HOUR SPONSOR: $900**
  - Program Advertising:
    - Full-Page Ad: $1250 (7.25" x 9.75")
    - Half-Page Ad: $750 (7.25" x 4.75")
    - Quarter-Page Ad: $475 (3.5" x 4.75")

- **GIFT SPONSOR: $450**
  - Podium recognition during prize drawing
  - Eighth-page ad in event program
  - One (1) tickets to the event*
  - Signage at the event

- **PROGRAM ADVERTISING:**
  - Eighth-Page Ad: $250 (3.5" x 4.75")
  - Business Card Ad: $150 (3.38" x 2")
  - (Submit Original Business Card)

**ALL ADVERTISING WILL BE DUE BY APRIL 26, 2019**

TICKETS & TABLES: Table of 10: $1050  Individual Tickets: $110 per person
TICKET/TABLE RESERVATIONS: To: VivianLevy1@gmail.com no later than Friday, May 10, 2019.

NAME:_________________________________________  NAMES OF ATTENDEES:

FIRM NAME:____________________________________

ADDRESS:_____________________________________  _______________________

CITY/STATE/ZIP:_______________________________  _______________________

TELEPHONE:___________________________________  _______________________

EMAIL:_______________________________________  _______________________

**BY CHECK:** Payable to NYSSCPA Nassau Chapter
  Mail to: Vivian Levy
  c/o KVLSM, LLP
  415 Crossways Park Drive, Suite C
  Woodbury, NY 11797

**BY CREDIT CARD VIA PAYPAL:** Check our website

*Paypal link for table & individual registrations only. All sponsorships and advertising will be billed by Vivian Levy.*
DISCOUNTED SPONSOR AND ADVERTISING RATES

FOR THE MAY 30, 2019 INSTALLATION DINNER

SIGN UP AND PAY BY JAN. 15, 2019 TAKE 20% OFF CONTRACT RATES

SIGN UP AND PAY BY FEB. 15, 2019 TAKE 15% OFF CONTRACT RATES

SIGN UP AND PAY BY MAR. 15, 2019 TAKE 10% OFF CONTRACT RATES

For Dinner Sponsorship Contract and information Contact Vivian Levy at vivianlevy1@gmail.com
UPCOMING MEETINGS AND EVENTS

A TECHNICAL MEETING SPONSORED
BY THE ACCOUNTING & AUDITING COMMITTEE
NASSAU CHAPTER

Accounting & Auditing Update
TUESDAY, DECEMBER 4, 2018

Chairpersons: Mark R. Cuccia, CPA
               Tina M. Fasano, CPA
               Franco Martorana, CPA

Speaker: George I. Victor, CPA, CGMA
         Giambalvo, Stalzer & Company, CPAs, PC

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

Time: 6:00 – 6:30 PM Dinner
      6:30 – 8:10 PM Presentation

Course Level: Basic

Course Code: 29031912

CPE Credits: 2

Cost: $20 for dinner and CPE presentation.
      Can be paid either by check
      (made out to the NYSSCPA – Nassau Chapter)
      or via the NYSSCPA website at
      https://cpe.nysscpa.org/product/29925

ACCOUNTING & AUDITING COMMITTEE

TUESDAY, DECEMBER 4, 2018
Marks Paneth LLP
88 Froehlich Farm Blvd. (Lower Level)
Woodbury, NY 11797

Please RSVP ASAP via email, fax or mail to::
Tina M. Fasano, CPA
 c/o Marks Paneth, LLP
 88 Froehlich Farm Blvd. Suite 200
  Woodbury, NY 11797
  Phone: 516-992-5891
  Fax: 516-992-5892
  Email: tfasano@markspaneth.com

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

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

Name:

Firm:

Email:

Address:

Telephone:

Email:
THURSDAY, December 13, 2018
6:15 – 9:00 pm*

SPECIFICS OF THE NEW TAX LAWS!

* Join us for a light dinner from 5:30pm – 6:15pm.

One of the most important provisions under the TCJA and the new accounting rules! Will any of your clients remain on accrual?

Acclaimed Lecturer - Eric P. Wallace, CPA will be discussing:

- Should you change your accounting method;
- Don’t be caught unaware of these rules;
- Learn about 3115’s required to change your method of accounting
- Benefits of the TCJA

DON’T MISS THIS LECTURE!!!

Other Topics covered will be:

- Prepaid expenses
- Inventories
- POC – important for the Construction Industry.

3 CPE will be earned during the event.

For more information contact Robert Schaffer, CPA at rschaffer@ck-co.com or 516-937-9500

PLACE: RXR Executive Park
Lower Level
68 S. Service Road
Melville, New York
New Tax Law & Pre-Tax Season

Speaker: Daniel Zlotnick, AIF, ERPA, QPA
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 Leibenhart, 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 MEETING

December 14, 2018
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
All meetings will be held at On Parade Diner, 7980 Jericho Turnpike, Woodbury, NY 11797

**Time:** 8:00 – 10:00 AM (full breakfast included)

**Cost:** $25.00 per person, paid in advance | $30.00 for pre-registrations paying at the door – no exceptions

**Effective January 1, 2019 costs will be the following:**

**Cost paid in advance:**
- Members: $30.00 per person | Non-members: $35.00 per person

**Cost for pre-registrations paying at the door — no exceptions:**
- Members: $35.00 per person | Non-members: $40.00 per person

You can contact your Co-Chairmen as follows:

<table>
<thead>
<tr>
<th>Eliot Lebenhart, CPA</th>
<th>Kenneth Hauptman, CPA</th>
<th>Alex Resnick, CPA</th>
</tr>
</thead>
<tbody>
<tr>
<td>(516) 294-0400</td>
<td>(516) 364-8888</td>
<td>(516) 364-8888</td>
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*Please note: meeting dates, topics, and speakers are subject to change.*
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 from 8:00 AM to 10:00 AM. Thanks to the generosity of Deloitte, many of our meetings are held in a great space in Jericho. We plan two dates with the Suffolk Chapter which will be held in Melville.

*The following meetings have been scheduled:*

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<th>Date</th>
<th>Topic</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/14/18</td>
<td>Tax Update</td>
<td>Deloitte/Jericho</td>
</tr>
<tr>
<td>2/6/19</td>
<td>Banking &amp; Economic Update</td>
<td>To Be Determined</td>
</tr>
<tr>
<td>3/20/19</td>
<td>Leadership Skills</td>
<td>To Be Determined</td>
</tr>
</tbody>
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*Dates for the following seminars will follow in the next newsletter:*

- Employment Law
- Healthcare & Benefits
- Understanding Bankruptcy

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

**Meeting locations:**
- Deloitte / Jericho – 2 Jericho Plaza, Jericho
- Marcum/Melville – 10 Melville Park Rd, Melville

**Committee Co-Chairs:**
- Joanne Krush, CPA, CFO
  - Sterling Risk
  - jkrush@sterlingrisk.com
  - 516-773-8605
- Anthony Aronica, CPA, CFO
  - LDJ Real Estate
  - aronica3@outlook.com
  - 516-822-7163

*Please contact Anthony Aronica or Joanne Krush if you’d like more information.*
Upcoming Meetings

Wednesday, December 19, 2018
Speaker and Topic to be announced.

Location for all meetings:
Grassi & Co.
50 Jericho Quadrangle, Suite 200, Jericho, NY 11753

Start time for all meetings – 8:00 AM

Fee – NO CHARGE

Contact Lou Grassi at Lgrassi@grassicpas.com
The Next-Gen Committee of the Nassau Chapter of the NYSSCPA is proud to host

**Networking in the New Year!**

**Register Today!**

Name: ___________________________________
Firm:   ___________________________________
Address: ___________________________________
Telephone: ___________________________________
Email*:  ___________________________________

*Required for credit card payment confirmation.

Pay by check:
Make check payable to NYSSCPA Nassau Chapter
Mail to: Alyssa Popov c/o Grassi and Co
50 Jericho Quadrangle, Ste 200
Jericho, NY 11753
Phone: 516-336-2472
Email: APopov@grassicpas.com

Pay by credit card:
*Online registration link coming soon. Check NYSSCPA Nassau website here*

**Date:**
January 8th, Tuesday 6:00 pm to 9:00 pm

**Location:**
Round 1 Entertainment
358 Broadway Mall #1950
Hicksville, NY 11801

**Refreshments:**
Food and beverages included. Beer and wine will be available for participants 21 years and over.

**Registration Fee:**
$30 per person with registration, $35 at the event.
NYSSCPA Nassau Chapter
Annual CPA Ethics Update

Wednesday, January 9, 2019
Chateau Briand
440 Old Country Road Carle Place, NY 11514

Times:

Managing Partners Meeting: 4:00 PM – 5:00 PM

Cocktails, dinner and CPE presentation: 5:30 PM – 9:00 PM (check-in begins at 5:00 PM)

Course Overview A hallmark of the public accounting profession is its commitment to professional ethics and the public interest. This course meets the New York State (NYS) ethics CPE requirement. The two CPE credit course focuses on updates to: revisions to the AICPA Code of Professional Conduct (“Code”), ongoing AICPA ethics division projects and AICPA & NYS OPD disciplinary actions; proposed revisions to NYS CPE requirements, NYS Board

Who Should Attend Primarily for all NYS licensed CPAs who need to learn the basics about the profession's ethics standards.

Learning Objectives

- Understand recent revisions to the Code
- Know emerging ethical issues facing the profession
- Gain knowledge of NYS Education proposed revisions to Rule 29.10, ethics CPE requirements, legislative update

Register online or call 800-537-3635

Cocktails, dinner and CPE session Course Code: 42032915
CPE Credits: 2 (regulatory Ethics)
Price: Members $75* | Nonmembers $125*

*price includes Foundation for Accounting Education (FAE) costs.
The NYSSCPA Nassau Chapter Women’s Focus Group

Will be hosting a post-holiday cocktail party. Please join us for an evening of networking with other female professionals.

Thursday, January 10, 2019

Time: 6:00 – 9:00 PM
Location: Garden City Hotel
45 Seventh Street
Garden City, NY 11530

Cost: $50 per person

Please register at: https://cpe.nysscpa.org/product/29944
To pay via check, make checks payable to: “NYSSCPA, Nassau Chapter” and mail with this form to:

Natalie Verbanac
Marcum LLP
750 Third Avenue
New York, NY 10017
P: (212) 485-5550
E-mail: Natalie.verbanac@marcumllp.com

_______ I will attend & enclosed is my payment of $50
_______ I am unable to attend but am interested in becoming more involved within the NYSSCPA Nassau Chapter

Name: ________________________________ Firm: _______________________________
E-Mail: ________________________________ Phone: ________________________________
NYSSCPA – NASSAU CHAPTER
SMALL-FIRM MAP COMMITTEE MEETING

January 18, 2019

New York Estate Planning

Speaker: TBA
CPE: 2 Credits Pending
Time: 8:00 – 10:00 AM (Be prompt!)
Place: On Parade Diner
7980 Jericho Turnpike, Woodbury
Cost:* Members: $30 per person paid in advance
$35 per person (includes pre-registered) paying at the door
Non-members: $35 per person paid in advance
$40 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

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

January 18, 2019

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 $______, 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: ________________________________

*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.
Nassau Chapter
Practice Continuity Committee

On October 26, 2018 members of the Capital Group Private Client Services team spoke on the topic of “Life after the Sale of Your Practice.” The topic appealed to a wide audience of firm owners and partners who must consider the ultimate transition of their practices and how life changes after a lifetime of client services. Speakers addressed preparing emotionally for leaving a firm; moving on to the next stage of life; how practice sales affect not just the CPA but families also; desired lifestyle after a sale and how to achieve it; transactional issues and concerns and; reasons to work or not to work after selling a practice (not just financial reasons). This presentation generated lots of thought-provoking ideas and we thank the team at the Capital Group for this excellent presentation.

January 25, 2019 we will be addressing “Solutions to Cybersecurity Risks.” Our April 2018 meeting was devoted to cybersecurity risks, what they are and how to know when risks are present. Many of our participants asked what can be done to protect against them. Cybersecurity and insurance specialists will advise us on how we can prevent or protect against cyber risks.

April 26, 2019 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 January 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
Practice Continuity Committee

Solutions to Cybersecurity Risks

Friday, January 25, 2019, 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, January 24).
☐ I prefer to pay $_____ at $30.00 per person at the door. (Walk-ins may be limited due to space availability).
☐ I am not a member of NYSSCPA. Enclosed is my check for $_____ at $35.00 per person.

Checks are payable to NYSSCPA, Nassau Chapter.

Note: Please RSVP by phone, fax or email as early as possible.

Name:

Firm Affiliation:

Address:

Email:

Telephone:
UPCOMING MEETINGS AND EVENTS

NYSSCPA Nassau /Suffolk Joint Chapter
Annual Networking Event
Hosted By Networking with Accountants Committee

Thursday, January 31, 2019
Join us for an Evening of Networking, Cocktails and Buffet Dinner
from 6:00 PM – 9:00 PM

Open to all NYSSCPA Members, Bankers, and other Professionals

Where:
The Fox Hollow
7725 Jericho Turnpike
Woodbury, NY 11797

Tickets:
Purchased in advance: $80
Walk-in (Not Registered): $90
Payment via check, cash or credit card (via Paypal)

To Register with Paypal: https://cpe.nysscpa.org/product/29943

***RSVP required by January 25, 2019***

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NYSSCPA
Nassau / Suffolk Joint Chapter
Annual Networking Event
January 31, 2019

Contact information:
Carol Pinto
NYSSCPA Nassau Chapter
Castellano, Korenberg & Co., CPA
313 W. Old Country Road
Hicksville, NY 11801
Ph 516-937-9500
Fax 516-932-0485
cpinto@ck-co.com

Registration Form:

Name:
Email Address:
Company Name:
Address:

Phone :
I am a: □ CPA □ Attorney □ Banker □ Other

□ Purchased in advance (before Jan 25): $80.00 □ Walk-in Fee: $90.00

# of Attendees:
Total Amount Due:
Additional Attendee Names:

Contact Phone Number:
CPAFest

The annual NYSSCPA Nassau Chapter Student CPAFest was held on Wednesday, November 14. We had over 100 students attend and 15 employer tables.
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!

Please forward your response to:
Natalie Verbanac, CPA  | Marcum LLP
750 Third Ave, New York, NY 10017
Tel: (212) 485-5550

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

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Attorney & Accountants
CFO & Financial Executives
Cooperation with Educational Institutions
Employee Benefits
Estate & Personal Financial Planning
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Litigation & Forensic Service
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NextGen Taxation
Practice Continuity
Real Estate
Women's Focus Group
Other ______________________________________________

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c/o KVLSM LLP
415 Crossways Park Drive, Suite C
Woodbury, NY 11797
Phone: (516) 294-0400 | Fax: (516) 938-0491
vivianlevy1@gmail.com

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e-mail: vivianlevy1@gmail.com

EVENT HIGHLIGHTS

CPAFest
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 Educational Institutions
☐ Employee Benefits
☐ Estate & Personal Financial Planning
☐ Financial Literacy
☐ Litigation & Forensic Service
☐ Management of Accounting Practice
☐ Membership
☐ Networking with Accountants
☐ Newsletter
☐ NextGen
☐ Practice Continuity
☐ Real Estate
☐ Other
☐ Small Practice MAP
☐ Sponsorship
☐ Taxation
☐ Women’s Focus Group

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

Please forward your response to:
Natalie Verbanac, CPA  | Marcum LLP
750 Third Ave, New York, NY  10017
Natalie.verbanac@marcumllp.com  | Tel: (212) 485-5550

Advertising Opportunities

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

email: vivianlevy1@gmail.com

SPONSORSHIP

If you wish to sponsor any Nassau Chapter or committee event, download our sponsorship contract here or contact

Vivian Levy
NYSSCPA Nassau Chapter
c/o KVLSM LLP
415 Crossways Park Drive, Suite C
Woodbury, NY 11797
Phone: (516) 294-0400 | Fax: (516) 938-0491
vivianlevy1@gmail.com
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. Tennenbaum, Esq.
- LLM (Tax), CPA (IRS & NYS) (631) 465-5000
- Noelle T. Geiger, Esq. (IRS & NYS) (516) 336-2447
- Yvonne Cort, Esq. (IRS & NYS) (516) 931-8100
- 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) 364-3390

Newsletter Committee
Newsletter produced by Sentinel Innovation
www.sentinelinnovation.com

**Nassau Chapter Newsletter Deadlines**
All submissions are due the 1st of the month prior to issue date. Email submissions to:
vivianlevy1@gmail.com

**Newsletter** | **Due Date**
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April | March 1
May | April 1

The newsletter is downloadable at:
http://www.nysscpa.org/page/nassau-chapters-newsletters

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NYS Society of Certified Public Accountants
MAIL AND EMAIL ADDRESS CHANGE FORM

CPA Certificate #: ___________ ___________ ___________ ___________

Name (Last, First, Middle Initial):

Address:

City/State/Zip:

Home Phone:

Email:

Firm Name:

Firm Address:

City/State/Zip:

Business Phone:

Chapter Member: ☐ Yes ☐ No

Please send all mail to: ☐ Firm ☐ Home

Specify chapter:

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

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