A Message from the President

Hope everyone enjoyed their summer as it slowly comes to an end and Fall is upon us. Kids are back to school, traffic is back and many of you are already in the midst of tax deadlines. Here at the Society, we are all geared up in planning our events and making this year a successful one.

I would like to thank everyone that attended, sponsored and helped support the 66th Installation Dinner on May 30 at the Crest Hollow Country Club, especially my fellow board members, our committees, Vivian Levy and Kathleen Becker and my family, especially my son who got up in front of all of you and gave a heartwarming speech I will never forget. Without all of you, we would not be able to do it. Even though the weather kept us inside as I was hoping we would have been able to celebrate by the beautiful poolside during cocktail hour, it was a great night seeing friends, colleagues and family come out to support us. As I mentioned during my installation speech, my focus during my term will be to promote the participation of the next generation and increase diversity, including women's participation. Our profession has changed, continues to change and we need to keep up with the changes.

Since the Installation Dinner, we have kept busy with various events. On July 1, our COAP Program wrapped up their annual five-day program for high school students at Adelphi University. I attended the closing dinner along with Vivian Martinez, our Vice President, Lisa Haynie, former President, and Robert Schaffer, current committee member. We could not have been more amazed and proud of the students. The program provides them an opportunity to network with others as they spend five days with each other (approx. 50 students) getting introduced to the business world, the importance of technology and working in teams. They also attended a baseball game and did a tour at a CPA firm, Marcum LLP in Melville, where myself and former Past President Ron Finkelstein along with Secretary, Kristina Albarella spoke about the profession and answered questions. Watching and listening to the students talk about how this program provided them an amazing experience that they will never forget, makes me as President very proud that we continue to support this program. Thank you to Jack Angel, Adelphi Professor and NYSSCPA member who has run this successful program for years.

Also during the summer, the Chapter supported on July 11, the Ellen Gordon CPAS 4(a): Cause 5k Run/Walk to end Hunger. Thank you to Ken Rick and his committee, together with Financial Planning and NCCPAC, for running a successful walk for a great cause and a good time. Many of our members and their firms participated in this event, which raised approximately $16,000 for Island Harvest!

On July 25, our NextGen Committee was busy playing kickball and networking with other professionals. They continue to plan more events this year for the younger members as we need the next generation to get involved to make our Chapter live on and continue to be as successful as it has been. Another networking event is planned for October 17 at Jewel in Melville, after the tax deadline. Please join us and, mingle (or vent!), network and have a drink with your fellow colleagues. I ask that partners and your firms please encourage your next generation to attend and participate in these events as it only will help them personally grow, and become better networkers, as they are the future of our profession. My mother keeps reminding me that we have to provide focus and direction to our son. The same goes for us, the seasoned professionals, to provide guidance for our next generation to be their mentors. My mother’s famous line is “you need to plant the seed.”

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

Our next events coming up this year are as follows: (Please save the dates and refer to the newsletter for more information.)

**October 24** – Oktoberfest at Black Forest Brew Haus in Farmingdale. Come and network with bankers and other financial professionals.

**October 30** – Student CPA Fest at Chateau Briand in Carle Place. We are expecting over 100 students from over 15 schools. If your firm has not registered yet, please register as soon as possible. This is a great opportunity for your firm to recruit highly qualified students.

**November 26** – Annual Night of Neturkeying with Attorneys at the Fox Hollow Inn in Woodbury. All profits from the event go to charity. Come and network with accountants and attorneys and support this deserving cause!

**December 6 & 7** – All-day tax event at the Marriot in Uniondale.

**January 22, 2020** – Managing Partner/Town Hall — Ethics training at Chateau Briand in Carle Place. We are honored to have Ernie Smith back again to teach the course.

In addition, we are hosting our annual Women’s Post-Networking Holiday Party at the Garden City Hotel in January 2020. Stay tuned for the date.

I am looking forward to making this another successful year as my Past Presidents have done by keeping up with the current environment, providing you relevant CPE and more networking opportunities and continuing to support our community and members. Our Chapter will be working more closely with the Suffolk Chapter to provide joint events, share ideas and collaborate in several committees. We encourage you to get involved if you have not done so already by attending our events and/or joining a committee! We have room if you are interested and are always looking for assistance and fresh ideas. Your comments, thoughts and ideas are always welcome. Please feel free to email me at Natalie.verbanac@marcumllp.com anytime. I hope to see you at our next event.

All the best,

Natalie Verbanac
NYSSCPA Nassau Chapter 2019-2020
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Save the Dates:

SEPTMBER 2019

Management of Accounting Practice
Monday, 9/9
Discussion
Grassi & Co., Jericho
8:00 – 9:30 AM

Real Estate Committee
Thursday, 9/26
Real Estate Losses
Marks Paneth, Woodbury
6:00 – 8:00 PM

CFO & Financial Executive Committee
Tuesday, 9/17
GAAP US Update
Deloitte, Jericho
8:00 – 10:00 AM

Small-Firm MAP
Friday, 9/27
Residency Audits and Issues
On Parade Diner, Woodbury
8:00 – 10:00 AM

OCTOBER 2019

Financial Literacy Committee
Saturday, 10/5
Freeport Library, Freeport
10:00 AM – 3:00 PM

Joint Nassau/Suffolk
Business & Industry Conference
Wednesday, 10/16
Securing Your Business from the Inside Out
Nawrocki Smith, Melville
8:30 AM – 5:00 PM

CFO & Financial Executive Committee
Thursday, 10/17 (Joint w/Suffolk)
The Economic Breakfast:
An Island in a Global Economy
The Mansion at Oyster Bay, Woodbury
8:00 – 10:30 AM

NextGen Committee
Thursday, 10/17
Post-Tax Season Cocktail Party
Jewel, Melville
5:00 – 8:00 PM

Practice Continuity Committee
Friday, 10/25
Grow Your Practice to Sell it:
A Succession Planning Guide
On Parade Diner, Woodbury
8:00 – 10:00 AM

Management of Accounting Practice
Thursday, 10/17
TBA
Grassi & Co, Jericho
8:00 – 9:30 AM

Networking with Accountants
Thursday, 10/24
Oktoberfest/Networking
Black Forest Brew Haus, Farmingdale
6:00 – 9:00 PM

Accounting & Auditing Committee
Tuesday, 10/29
Evolving to Today’s Audit
Marks Paneth, Woodbury
6:30 – 8:10 PM

STUDENT CPA FEST
Wednesday, 10/30
Chateau Briand, Carle Place
5:00 – 8:30 PM

NEWSLETTER OVERVIEW & USEFUL INFORMATION

NEWSLETTER OVERVIEW & USEFUL INFORMATION

Chapter Officials:

President
Natalie Verbanac, CPA

Vice President
Vivian Martinez, CPA

Treasurer
Mark R. Cuccia, CPA

Secretary
Kristina Albarella, CPA

Director
(Past President)
Alex Resnick, CPA

Directors
Jean David Chery, CPA
Tina M. Fasano, CPA
Kenneth Hauptman, CPA
Michael Katz, CPA
Craig Morris, CPA
Elizabeth Oberg, CPA
Alyssa Popov, CPA
Kenneth H. Rick, CPA

Accounting & Auditing
Mark R. Cuccia, CPA
Tina M. Fasano, CPA
Franco Martorana, CPA

Attorney & Accountants
Kristina Albarella, CPA
Iola Damante, CPA

CFO & Financial Executives
Joanne Krush, CPA
Miles Doherty, CPA

Cooperation with Educational Institutions
Michael Katz, CPA

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

Financial Literacy
Lawrence M. Just, CPA

Management of Accounting Practices
Louis Grassi, CPA

Membership
Scott Sanders, CPA

Networking with Accountants
Neal Korenberg, CPA

Newsletter
Lynne M. Fuentes, CPA
Natalie Verbanac, CPA

NextGen Committee
Wei Xu, CPA
Jean David Chery, CPA
Garrick Turano, CPA
Alyssa Popov, CPA

NextGen Liaison
Lynne M. Fuentes, CPA

Practice Continuity
Larry Bloom, CPA
Eliot Lebenhart, CPA
Craig R. Morris, CPA

Real Estate Committee
Jodi Bloom-Piccone, CPA
Vivian Martinez, CPA
Deana Wetzel, CPA

Small-Practice Unit Map
Kenneth Hauptman, CPA
Eliot Lebethart, CPA
Alex Resnick, CPA

Sponsorship Committee
Roseann Almeida
Lynne M. Fuentes, CPA
Elizabeth Oberg, CPA
Natalie Verbanac, CPA

Taxation Committee
Robert S. Barnett, CPA
Robert J. Schaffer, CPA

Women’s Focus Group
Geri Gregor, CPA
Lisa Haynie, CPA
Elizabeth Oberg, CPA
Natalie Verbanac, CPA

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Popular=&trk=tyah&trkInfo=tas%3Anysscpa%20nas

Chartered 1953
NASSAU CHAPTER
www.nysscpa.org
IN THE NEWS

Member Profile:

Lelia Dickenson

There are always those working behind the scenes, running operations, managing crises, facilitating important decision-making and actions, that deserve to be lauded for all that they do—these people are the true heroes who make the world go ’round. As Chapter Relations Manager for the NYSSCPA, Lelia Dickenson is one such hero. She truly does it all for the organization and maybe most importantly, acts as liaison between the State Society itself and each individual NYSSCPA chapter.

In this capacity, she assists the Nassau Chapter in a myriad of aspects, from helping the Executive Board in its numerous functions, aiding in the formation of best practices and assuring continuance of its many committees. And she is there to help the Chairs in understanding the extensive variety of rules and regulations involved in running these committees. “I’m basically their go-to person,” Lelia states.

For the past 19 years, she has been instrumental in helping the Society run smoothly, especially since each chapter functions in its own particular way. She’s been with the NYSSCPA for the last 22 years, and in her role as Chapter Relations Manager, for the past 19.

On a day-to-day basis, she helps those who need to connect to other members or committees and chapters, and she assists others in finding and sending proper documents and notifications for each situation that arises, educating members on how to put together the many events held for both chapters and committees.

Event planning is her specialty and was her entrée to the Society. She began by putting on affairs for the NYSSCPA and gradually her role grew. In her role now, she is basically den mom, head of events and Superwoman, all rolled into one.

In her busy role, she educates members on the particulars of how chapters should be run, ensures that their boards are running smoothly, guides Chairs on the structuring of committees, and on how they can find submission forms and rosters. In addition, she reaches out to each chapter to facilitate these processes and educates on how each aspect operates.

However, there are challenges to every job, even one Lelia considers to be pretty ideal. One such challenge is that sometimes members don’t always have enough time to participate in the NYSSCPA as fully as they’d like. Lelia steps in to bring members together. “My job is to make sure that communication is flowing and that everyone is on the same page,” says Lelia.

She does receive great rewards in her position precisely because of the Society’s membership and leadership.

“As accountants and professionals, I feel that they should be community leaders, especially when, like now, society is going through so many changes and moving into a more technological era. At this time, we need to ground ourselves as a community; I think that’s very important.”
“I love helping people who I respect and admire and our members are incredible people. I love helping them, and truly can’t sing their praises enough.”

Before her work with the Society, Lelia achieved her B.A. in the Theater Arts, at Queens College, and feels this education furthered her in her chosen career. It helped her tremendously in her ability to communicate, which is so important to her profession. She was always good at talking though, growing up in the boroughs of New York. “I’m a Bronx girl,” she explains, “a New Yorker. Here, we talk fast, we move fast,” she laughs.

After college, Lelia primarily worked in the nonprofit sector for holistic organizations and children’s theater. She went almost immediately into event planning and always knew that she wanted to work with nonprofits going forward. Lelia is an avid gardener and volunteers at a community garden in the Bronx, where she not only volunteers as a gardener but helps to organize their events, as well as teaching free painting and arts-and-crafts workshops open to the community.

So it’s not hard to see why she especially likes that the chapters do quite a bit of community outreach, whether working with City Harvest, the 401k runs or other events. “I believe that giving back is important for everyone,” says Lelia. “As accountants and professionals, I feel that they should be community leaders, especially when, like now, society is going through so many changes and moving into a more technological era. At this time, we need to ground ourselves as a community; I think that’s very important.”

As far as the next generation is concerned, she feels that outreach is critical, especially for the Society. “We want to support the chapters and so the pipeline is very important—there are great initiatives in the works. We recently started the new Leadership Institute, rolling it out at the Leadership Conference, an annual event for leaders and board members in the Society,” says Lelia.

“The Institute provides a yearlong training program begun at the conference and will be followed up with additional virtual training and teleconferences, so that everyone understands the challenges and roles required to be a leader. This helps to bridge the gap to the next generation, and hopefully for the whole profession, with our focus on increased college and high school outreach.”

Her role at the Leadership Conference was in facilitating the Chapter President-Elect workshop and in training incoming Chapter presidents, with an overview of the duties and tasks involved in becoming a Chapter President.

For Lelia, going forward both personally and professionally, she is excited for the opportunity to grow and experience new roles in the organization. “I don’t know exactly where my profession will take me,” she notes, “but with new technologies and education on the horizon, I know that there will be big changes. And I’m looking forward to growing with those changes.”
Financial Literacy is defined as “the possession of the set of skills and knowledge that allows an individual to make informed and effective decisions with all of their financial resources.” This lesson is valuable for people of all ages, including children, so that they can begin learning these lessons about money early on.

Karen Tenenbaum is a leading New York tax attorney at Tenenbaum Law, PC (litaxattorney.com). The firm has won many honors for its work in the community, including Best Tax Law Firm in Long Island Business News. Karen has been active in the field for more than 35 years, beginning with her career at the Big 8 firm of Deloitte. She has headed up her own firm for the past 23 years, where she resolves IRS and New York State tax matters for a wide range of individuals and businesses. She also devotes her time to teaching children about money.

She has been connected to the Nassau Chapter NYSSCPA for decades. In addition to sitting on the Executive Board twice and heading up other Society committees, Karen was the inaugural Chair for the Financial Literacy Committee. In that capacity, she took it upon herself (along with her committee team) to educate children in money and finance. For her extensive work in this area, she has been featured on Fox 5 NY and in The New York Times (with an article titled “Opening the World of Business to Children”).

In addition, Karen hosts a website (walterthevault.com), featuring a lovable character called Walter the Vault, which teaches younger children, approximately ages 3-6, about the basics of finance. For her extensive work in this area, she has been featured on Fox 5 NY and in The New York Times (with an article titled “Opening the World of Business to Children”).

Karen Tenenbaum, ESQ, LLM (TAX), CPA
shopkeepers, etc. When their “workday” and “financial transactions” with each other are done, they get to spend their earned salary and go shopping. Tens of thousands of children have come through this one-of-a-kind program.

To help with costs, some big businesses donate either their time or money. Capital One provides a large donation every year or so and McDonald’s provided lunches for many years. Also, IKEA donated the program’s kitchen. Kids who have attended Commerce Plaza have sometimes noted that this day was better than visiting the circus.

Throughout the years, the NYSSCPA’s Financial Literacy committee has covered the gamut of financial interests; at its inception, focusing on the financial knowledge of children, teaching them the ins and outs of financial health, and providing practical information, so that they understand the direct impact of how they spend their money. The focus has now become a professional-based committee that guides accountants in the field on how to best serve their clients and to earn CPE points along the way.

Lawrence M. Just, the present-day Chair, received his BS in Accounting from St. John’s University and his MS in Tax from LIU. He is now working toward his Certification Financial Planner (CFP) credential. When he began as Chair, Larry altered the role and focus of the Financial Literacy committee, believing its most recent purpose is to, “service the members of the Nassau Chapter as well as the community at large” and he is happy to provide members who need continuing education credits in the field with free seminars on a wide range of pertinent topics.

The Committee co-sponsors financial information events, including the edifying Financial Fitness Day. Lawrence and his committee take these engagements out into the community, participating at local libraries and schools in surrounding neighborhoods. “There is no charge,” says Lawrence, “and we encourage participants to get all of their most important questions answered. Whether you are an experienced professional or not, there are many complexities involved in the financial world and it is not getting any simpler.”

— LAWRENCE M. JUST, CPA

Many people do not know the difference between debt and equity, how to budget and project cash flow, deal with the finances relating to parents, partners, divorce and children, as well as tuition, retirement, taxes, investments and protection.”

He enjoys the variety of topics and activities that they host and always looks for the best speakers and members to create a learning environment that will help a wide variety of audiences.

“The recent activities involve diverse topics that interest me. I am able to find experts who are both smart and entertaining. That is a good combination and because of it, we have many repeat customers. Going forward, we are looking at peer review and estate planning in the middle distance.”

Back when Lawrence first began his membership in the Society, he worked with the Suffolk Chapter, and felt that perhaps the Society was a bit more social back then.

“We had an active program and good communication. You know the old saying, that you get out of it what you put into it.” And so they all learned a lot and had fun while doing it. “As a CPA from New York who does taxes and investments, there is a lot of experience available and a chance to give back to a group that has helped to advance my career.”

In the future, whether helping young and older children or eager-to-learn accounting professionals, the Financial Literacy Committee will find a way to help both members and our community with the ways in which we think about money, how to save and earn it, and ultimately how to manage it properly, to ensure a bright financial future for us all.

IN REGARDS TO THE FINANCIAL LITERACY EVENTS:

“...we encourage participants to get all of their most important questions answered. Whether you are an experienced professional or not, there are many complexities involved in the financial world and it is not getting any simpler.”

— LAWRENCE M. JUST, CPA
Member, are you interested in being interviewed for the newsletter?
Reach out to Vivian Levy at vivianlevy1@gmail.com.

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.

SPACE FOR 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.
SAVE THE DATE:
UPCOMING MEETINGS

Monday, September 9, 2019
Thursday, October 17, 2019
Wednesday, November 13, 2019
Tuesday, December 17, 2019

Location (All meetings):
Grassi & Co.
50 Jericho Quadrangle, Suite 200
Jericho, NY 11753

Meeting Time:
8:00 - 9:30 AM
(Continental breakfast will be available)

Contact Lou Grassi at Lgrassi@grassicpas.com
REAL ESTATE COMMITTEE
NASSAU CHAPTER

Thursday, September 26, 2019

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

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

Dear Deana:

☐ I will attend the CPE presentation at 6:00 PM which includes sandwiches and refreshments. I am enclosing a check for $______ at $25.00 per person, payable to NYSSCPA–Nassau Chapter

☐ I will attend the CPE presentation at 6:00 PM which includes sandwiches and refreshments. I have registered online via the NYSSCPA website.

(Please attach a list of names or attach business cards if paying for more than one attendee)

Name (print):
Firm:
Address:
Telephone:
Email:

To ensure we have adequate seating, please fax back or mail your reservation as soon as possible.
Thank you.
NYSSCPA – NASSAU CHAPTER
SMALL-FIRM MAP COMMITTEE MEETING

Friday, September 27, 2019
8:00 – 10:00 AM

Residency Audits and Issues

Speaker: Karen Tenenbaum, Esq.
Time: 8:00 – 10:00 AM (Be prompt!)
Place: On Parade Diner
7980 Jericho Turnpike, Woodbury 11797
CPE: 2 Credits Pending

To help reserve the proper space, please pre-register as follows: Either call Shannon at (516) 364-8888 or email her at svolkerts@wmrcpa.com OR register online by going to NYSSCPA.org (then CPE, then scroll to our event).

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

All check payments prior to the meeting should be payable to NYSSCPA – Nassau Chapter and mailed to:
Alex Resnick
Wild, Maney & Resnick, LLP
185 Froehlich Farm Blvd., Woodbury, NY 11797

WE LOOK FORWARD TO SEEING YOU THERE!

Your co-chairpersons:
Eliot Lebenthal, CPA      Ken Hauptman, CPA
Alex Resnick, CPA

*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
Friday, September 27, 2019
On Parade Diner
7980 Jericho Turnpike, Woodbury, NY 11797

Please pre-register by calling Shannon at (516) 364-8888 ext. 900, email her at svolkerts@wmrcpa.com or register online by going to NYSSCPA.org (then CPE, then scroll to our event).

All check payments prior to the meeting should be payable to NYSSCPA Nassau Chapter and mailed 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
The NextGen Committee of the Nassau Chapter of the NYSSCPA

Post Tax Season Cocktail Party

Sponsored by UHY LLP, Certified Public Accountants

Register Today!

Date:
October 17th, Thursday 5:00 pm to 8:00 pm

Location:
Jewel
400 Broadhollow Road (route 110), Melville, NY 11747
Entrance on South Service Road

Refreshments:
Passed appetizers, refreshments will be served.
Select beer/wine will be available for participants 21 years and over.

Registration Fee:
$60 per person with registration, $80 at the door.

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

*Required for credit card payment confirmation.

Pay by check:
Make check payable to NYSSCPA Nassau Chapter
Mail to: Jean Chery c/o Grassi and Co
50 Jericho Quadrangle, Ste 200
Jericho, NY 11753
Phone: 516-256-3510
Email: JChery@Grassicpas.com

Pay by Credit Card:
Register online via PayPal
https://cpe.nysscpa.org/product/30788
No PayPal account necessary.
Thursday, October 17, 2019
8:00 – 10:30 AM
(Breakfast will be available)

2019 Economic Breakfast
~An Island in a Global Economy~

SPEAKERS:
Herman A. Berliner, PhD
Provost & Senior Vice President for Academic Affairs
Hofstra University

Janet A. Lenaghan, DPS
Dean
Frank G. Zarb School of Business
Hofstra University

LOCATION: The Mansion at Oyster Bay, 1 S Woods Road, Woodbury, NY 11797

COURSE CODE: 29085005

TO REGISTER: https://cpe.nysscpa.org/product/30765

NASSAU CFO COMMITTEE CO-CHAIRS:
Miles Doherty, CPA mdoherty@uucsr.org
Joanne Krush, CPA jkrush@sterlingrisk.com

FOR MORE INFORMATION, CALL (516) 671-4900 EXT. 7270
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. We plan two dates with the Suffolk Chapter which will be held in Melville.

**The following meetings have been scheduled:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/17/19</td>
<td>GAAP US Update</td>
<td>Deloitte / Jericho</td>
</tr>
<tr>
<td>10/17/19</td>
<td>Joint w/Suffolk - The Economic Breakfast: An Island in a Global Economy</td>
<td>The Mansion at Oyster Bay, Woodbury</td>
</tr>
<tr>
<td>11/4/19</td>
<td>Lease Accounting</td>
<td>Deloitte / Jericho</td>
</tr>
<tr>
<td>12/17/19</td>
<td>Tax Update</td>
<td>Deloitte / Jericho</td>
</tr>
<tr>
<td>1/6/20</td>
<td>Working Capital Improvements</td>
<td>Deloitte / Jericho</td>
</tr>
</tbody>
</table>

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

**Meeting locations:** Deloitte / Jericho – 2 Jericho Plaza, Jericho, NY
October Meeting – The Mansion at Oyster Bay, 1 S Woods Rd, Woodbury, NY

**Committee Co-Chairs:**

<table>
<thead>
<tr>
<th>Joanne Krush, CPA, CFO</th>
<th>Sterling Risk</th>
<th><a href="mailto:jkrush@sterlingrisk.com">jkrush@sterlingrisk.com</a></th>
<th>516-773-8605</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anthony Aronica, CPA, CFO</td>
<td>LDJ Real Estate</td>
<td><a href="mailto:Aronica3@outlook.com">Aronica3@outlook.com</a></td>
<td>516-822-7163</td>
</tr>
</tbody>
</table>

*Please contact Anthony Aronica or Joanne Krush if you’d like more information.*
Celebrate Oktoberfest on Long Island!

Thursday, October 24, 2019 | 6 to 9 p.m.
at Black Forest Brew Haus
2015 New Highway, Farmingdale

Celebrate Oktoberfest and network with the Cooperation with Bankers, Other Credit Grantors, and Finance Professionals Committees.

A NYSSCPA Joint Chapter Event – Suffolk & Nassau

$55 per person until 10/17/19.
$65 after.

To register CLICK HERE
Info: DSchadler@bethpagefcu.com, 516-349-6887
Grow Your Practice to Sell It: A Succession Planning Guide

Darryl Boyd of Poe Group Advisors
Financing the Sale of Your Practice
Shannon Hay VP, Accounting and Tax of Live Oak Bank

Friday, October 25, 2019 • 8:00 AM

On Parade Diner, Woodbury, NY
7980 Jericho Turnpike, Woodbury New York, 11797 • phone # (516) 364-1870

Please note the new registration process – all registrations can be done at:
NYSSCPA.org
(then CPE, Find Courses – scroll down to our meeting)

Meeting fees for online registration:
• $25.00 per person (must be received by noon, Thursday, October 24) or;
• $30.00 per person at the door. (Walk-in's may be limited due to space availability);
• Non-members of NYSSCPA’s may attend at $35.00 per person

FOR QUESTIONS, CONTACT:
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

Note: Please register early to allow for adequate accommodations for our group.
Nassau Chapter Practice Continuity Committee

Succession planning is an important part of a CPA’s exit strategy, and it’s never too early to begin. The Practice Continuity Committee is a resource to help with that planning, whether for retirement and succession or to prepare for death or disability. Our Committee is an educational and networking resource, with goals and activities that include:

- the development of a community of CPAs to exchange ideas;
- a place for educational resources on practice continuity issues;
- meetings to address topics specific to practice continuity concerns;
- networking events where members can meet and discuss issues;

Our July meeting included organizational matters and a CPE session. John Repetti of Bestia Consulting and Joe Tarasco of Accountants Advisory Group discussed why the old business model for small firms is broken and the top factors in developing a business strategy to implement a successful succession plan. The feedback was tremendous and I want to thank John and Joe for a fabulous presentation.

On Friday, October 25, 2019 at 8:00 AM, our meeting will be on Growing Your Practice to Sell It: A Succession Planning Guide presented by Darryl Boyd, Regional Market Leader of Poe Group Advisors and Financing the Sale of Your Practice by Shannon Hay VP, Accounting and Tax of Live Oak Bank. The meeting will qualify for 2 CPE Credits.

Every business plan should include an exit strategy. But, as CPAs, we often don’t have an exit plan. Darryl says: “We want to see practices succeed and we have a lot of experienced insight into what works and what doesn’t in the sale of a firm.” He will speak to us on how to know when to sell; key practice valuation factors; growing your practice to sell it and other matters to benefit both sellers and buyers.

Part of a plan to sell a firm is financing and deal structure. Shannon Hay works with accounting and tax professionals nationwide on practice sales. Shannon has worked in the special assets group at one of the nation’s largest banks, assisting in the sale of professional practices. He understands the importance of the deal flow and strives to always keep the deal moving forward. Shannon is committed to the accounting profession, meeting with industry experts and constantly staying in front of trends in the accounting world. He will address the factors that should be considered in making sale happen quickly and efficiently, how to help your buyer make a successful purchase and ensure smooth and fair payment terms.

Please note the new registration process — all registrations should be done at NYSSCPA.org (then CPE, Find Courses – scroll down to our meeting). Meeting fees, including a full breakfast and CPE credit are generally:

- $25.00 per person (must be received by noon, Thursday, before the meeting date) or;
- $30.00 per person at the door. (Walk-in’s may be limited due to space availability);
- Non-members of NYSSCPA’s may attend at $35.00 per person for online registration and $40 at the door.

Early registration is appreciated to allow for adequate accommodations for our group.

**FUTURE MEETING DATES ARE JANUARY 31, 2020 AND APRIL 24, 2020.** Please remember to schedule our events in your calendar now, to avoid conflicts. Our meetings are generally held at On Parade Diner (7980 Jericho Turnpike, Woodbury, NY 11797; phone (516) 364-1870), the last Friday of the meeting month, though dates and locations are subject to change. For more information, on this meeting or our Committee, contact us at ginette@morriscpas.com. We appreciate your participation.

*Craig Morris, Chairman*
UPCOMING MEETINGS AND EVENTS

Accounting & Auditing Committee

Tuesday, October 29, 2019
6:30 – 8:15 PM

TOPIC: EVOLVING TO TODAY’S AUDIT

• Using data analytics for the risk assessment and planning of an audit.
• How to incorporate data analytics into the audit.

SPEAKERS: Michael J. Holmstrom - Grassi & Co. CPAs P.C.

LOCATION: Marks Paneth LLP
88 Froehlich Farm Boulevard
Woodbury, NY 11797-2921

TIME: 6:30 – 8:15 PM

COST: $20

CPE: 2 Credits

COURSE CODE: 29031009

Please Register Online At:
https://cpe.nysscpa.org/product/30778
SAVE THE DATE:

STUDENT CPA COLLEGE FEST 2019

5PM - 8:30PM | 10/30/2019
CHATEAU BRIAND
440 Old Country Rd, Carle Place, NY 11514

Come meet accounting students from local universities and share your career experiences, firm culture and hiring opportunities.

5PM-8:30PM: Networking, Cocktail Hour & Job Fair

Table Opportunity: $250
Admission to Networking & Job Fair, Table, includes 2 attendees
Each additional attendee is $50

REGISTER HERE: HTTPS://CPE.NYSSCPA.ORG/PRODUCT/30585

QUESTIONS? CONTACT: NYSSCPACOLLEGEFEST@GMAIL.COM
SAVE THE DATE

NYSSCPA Nassau/Suffolk Chapters’ Annual All-Day A&A Conference

Friday, November 8, 2019
Radisson Hotel
110 Vanderbilt Motor Pkwy, Hauppauge, NY

Topics:
Construction Accounting Refresher
Employee Benefit Plans Update
Not for Profit Accounting Update
Peer Review Best Practices Discussion
GAAP/GAAS Update

Check website and upcoming newsletters for more information.
SAVE THE DATE

TOWN HALL MEETING AND ETHICS UPDATE

Wednesday, January 22, 2020
Chateau Briand, Carle Place

Check upcoming newsletters and website for more information.
66th Annual NYSSCPA Nassau Chapter Installation Dinner

The 66th Annual NYSSCPA Nassau Chapter Installation Dinner was held on May 30 at Crest Hollow Country Club. The dinner was well-attended and as usual, a wonderful time was had by all.

Ken Hauptman, Tina Fasano, Jean David Chery, Alyssa Popov, Secretary Kristina Albarella, President Natalie Verbanac, Past President Alex Resnick, Vice President, Vivian Martinez, Elizabeth Oberg, Craig Morris, Treasurer Mark Cuccia

(Incoming board members Michael Katz and Kenneth Rick were unavailable)

President Natalie Verbanac with Past President Alex Resnick

Former Chapter President Lynne Fuentes, President Natalie Verbanac, Karen Tenenbaum
EVENT HIGHLIGHTS

66th Annual NYSSCPA Nassau Chapter Installation Dinner

Award recipient Lisa Haynie with MC Neil Katz and Former President Anthony Basile

President Natalie Verbanac and family

President Natalie Verbanac and Distinguished Service Award recipient Lisa Haynie

President Natalie Verbanac being sworn in by Past President and her college professor Anthony Basile

President Natalie Verbanac thanks Kathy Becker for her invaluable assistance to the Chapter
66th Installation Dinner Sponsors & Advertisers

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

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Wild Maney & Resnick, LLP

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Capell Barnett Matalon & Schoenfeld LLP
Marks Paneth, LLP
Schwartz & Company, LLP

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The Financial Planning Association of Long Island
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Nassau/Suffolk Chapter of NCCPAP
18th Annual Ellen Gordon CPAs 4(a): Cause 5K Run/Walk

On July 11, NYSSCPA Nassau Chapter joined Island Harvest in the 18th Annual Ellen Gordon CPAs 4(a): Cause 5K Run/Walk to End Hunger at Eisenhower Park. We had a wonderful turnout, everyone had a great time, and we raised needed funds to help feed those in need.
EVENT HIGHLIGHTS
NextGen Kickball Event, July 25

These NextGen events are so much fun. Keep looking in our newsletter and on our website to join in the fun.
Practice Continuity Committee Meeting

John Repetti of Bestia Consulting and Joe Tarasco of Accountants Advisory Group speak to the Practice Continuity Committee CPE session held on July 26, 2019.
## Chapter Meetings

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## Accounting & Auditing

Mark Cuccia, Franco Martorana, Tina Fasano

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<tr>
<td>Marks Paneth, Woodbury</td>
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<td>All Day Accounting/Auditing Conference</td>
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## Attorney & Accountant Joint Committee

Kristina Albarella, Iola Damante

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<td>Joint w/ Suffolk Chapter Attorney</td>
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## CFO & Financial Executives

Miles Doherty, Joanne Krush

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<td>Tuesday, 12/17</td>
<td>Monday, 1/6</td>
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<td>GAAP US Update</td>
<td>Joint w/ Suffolk Chapter</td>
<td>Lease Accounting</td>
<td>Tax Update</td>
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<td>Deloitte, Jericho</td>
<td>2019 Economic Breakfast</td>
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<td>8:00 – 10:00 AM</td>
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<td>Woodbury, NY</td>
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## Cooperation with Educational Institutions
Michael Katz

|--------|-----------|----------|----------|----------|----------|
| Wed 10/30 | Wednesday, 10/30  
       | Student CPA Fest  
       | Chateau Briand, Carle Place  
       | 3:30 PM – 8:30 PM | | |

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

|--------|-----------|----------|----------|----------|----------|
| Fri 12/6 – Sat 12/7 | | | Friday 12/6 – Sat 12/7  
       | | | Joint w/Taxation  
       | | | Marriott, Uniondale | | |

## Financial Literacy Committee
Larry M. Just

|--------|-----------|----------|----------|----------|----------|
| Sat 10/5 | Saturday, 10/5  
       | Freeport Library, Freeport  
       | 10:00 AM – 3:00 PM | | | |

## Management of Accounting Practice
Louis Grassi

|--------|-----------|----------|----------|----------|----------|
| Mon 9/9 | Monday, 9/9  
       | Key Issues/Roundtable Discussion  
       | Grassi & Co, Jericho  
       | 8:00 – 9:30 AM | | |
| Thu 10/17 | Thursday, 10/17  
       | Grassi & Co, Jericho  
       | 8:00 – 9:30 AM | | | |
| Wed 11/13 | Wednesday, 11/13  
       | Grassi & Co, Jericho  
       | 8:00 – 9:30 AM | | | |
| Wed 12/17 | Wednesday, 12/17  
       | Grassi & Co, Jericho  
       | 8:00 – 9:30 AM | | | |

## NextGen Committee
Jean David Chery, Alyssa Popov, Garrick Turano, Wei Xu | NextGen Liaison - Lynne Fuentes

|--------|-----------|----------|----------|----------|----------|
| Thu 10/17 | Thursday, 10/17  
       | Post-Tax Season Cocktail Party  
       | Jewel, Melville  
       | 5:00 – 9:00 PM | | |
### Networking with Accountants
Neal Korenberg

|-----------|----------|----------|----------|----------|
| Thursday, 10/24  
Joint w/Suffolk  
Oktoberfest/Networking  
Black Forest Brew Haus, Farmingdale  
6:00 – 9:00 PM |          |          |          |          |

### Practice Continuity & Succession Planning Committee
Craig Morris, Eliot Lebenhart, Larry Bloom

|-----------|----------|----------|----------|----------|
| Friday, 10/25  
Grow Your Business: A Succession Planning Guide  
On Parade Diner, Woodbury  
8:00 – 10:00 AM | | | | Friday, 1/31  
Topic TBD  
On Parade Diner, Woodbury  
8:00 – 10:00 AM |

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|          |            | Friday, 4/24  
Topic TBD  
On Parade Diner, Woodbury  
8:00 – 10:00 AM |          |          |          |

### Real Estate
Vivian Martinez, Jodi Bloom-Piccone, Deana Wetzel

|-----------|----------|----------|----------|----------|
| Thursday, 9/26  
Real Estate Losses  
Marks Paneth, Woodbury  
6:00 – 8:00 PM |          |          |          |          |

### Small-Practice Unit MAP
Eliot Lebenhart, Kenneth Hauptman, Alex Resnick

|-----------|----------|----------|----------|----------|
| Small-Firm MAP  
Friday, 9/27  
Residency Audits and Issues  
On Parade Diner, Woodbury  
8:00 – 10:00 AM |          |          |          |          |
### Taxation Committee
Robert Barnett, Robert Schaffer

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<td><strong>Friday 12/6 - Sat 12/7</strong>&lt;br&gt;<strong>Joint w/Estate &amp; Personal Financial Planning</strong>&lt;br&gt;Marriott, Uniondale</td>
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### Women's Focus Group
Geri Gregor, Lisa Haynie, Liz Oberg, Natalie Verbanac

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## OFFICERS/EXECUTIVE COMMITTEE

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<tr>
<th>Position</th>
<th>Name</th>
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<th>Address</th>
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<tbody>
<tr>
<td>Director (Past President)</td>
<td>Alex Resnick, CPA</td>
<td>Wild Maney Resnick LLP</td>
<td>185 Froelich Farm Blvd, Woodbury, NY 11797</td>
<td>(516) 364-8888</td>
<td><a href="mailto:alresnick@wmrcpa.com">alresnick@wmrcpa.com</a></td>
</tr>
<tr>
<td>President</td>
<td>Natalie Verbanac, CPA</td>
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<td>750 3rd Avenue, New York, NY 10017</td>
<td>(212) 485-5550</td>
<td><a href="mailto:natalie.verbanac@marcumllp.com">natalie.verbanac@marcumllp.com</a></td>
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<td>Vivian Martinez, CPA</td>
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</tr>
<tr>
<td>Treasurer</td>
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<td><a href="mailto:mcuccia@markspaneth.com">mcuccia@markspaneth.com</a></td>
</tr>
<tr>
<td>Secretary</td>
<td>Kristina Albarella, CPA</td>
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<td><a href="mailto:kristina.albarella@marcumllp.com">kristina.albarella@marcumllp.com</a></td>
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## DIRECTORS 1-YR TERM (ENDING 5/31/20)

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<th>Name</th>
<th>Firm Name</th>
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<th>Phone</th>
<th>Email</th>
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<tr>
<td>Kenneth Hauptman, CPA</td>
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<tr>
<td>Craig Morris, CPA</td>
<td>Craig Morris &amp; Company</td>
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<td>(516) 681-1121</td>
<td><a href="mailto:craig@cmcocpas.com">craig@cmcocpas.com</a></td>
</tr>
<tr>
<td>Jean David Chery, CPA</td>
<td>Grassi &amp; Co., CPAs</td>
<td>50 Jericho Quadrangle, Suite 200, Jericho, NY 11753</td>
<td>(516) 336-2456</td>
<td><a href="mailto:JChery@grassicpas.com">JChery@grassicpas.com</a></td>
</tr>
<tr>
<td>Alyssa Popov, CPA</td>
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<td>(516) 336-2472</td>
<td><a href="mailto:apopov@grassicpas.com">apopov@grassicpas.com</a></td>
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## DIRECTORS 2-YR TERM (ENDING 5/31/21)

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<tr>
<td>Michael Katz, CPA</td>
<td>KVLSM LLP</td>
<td>415 Crossways Park Dr., Suite C, Woodbury, NY 11797</td>
<td>(516) 294-0400</td>
<td><a href="mailto:MKatz@kvlsmpca.com">MKatz@kvlsmpca.com</a></td>
</tr>
<tr>
<td>Elizabeth Oberg, CPA</td>
<td>KVLSM LLP</td>
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<td>(516) 294-0400</td>
<td><a href="mailto:loberg@kvlsmpca.com">loberg@kvlsmpca.com</a></td>
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<tr>
<td>Tina M. Fasano, CPA</td>
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<td>(516) 992-5891</td>
<td><a href="mailto:tfasano@markspaneth.com">tfasano@markspaneth.com</a></td>
</tr>
<tr>
<td>Kenneth H. Rick, CPA</td>
<td>Janover LLC</td>
<td>100 Quentin Roosevelt Blvd, Garden City, NY 11530</td>
<td>(516) 750-6876</td>
<td><a href="mailto:ken.rick@janoverllc.com">ken.rick@janoverllc.com</a></td>
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## ACCOUNTING & AUDITING

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<td><a href="mailto:fmartorana@markspaneth.com">fmartorana@markspaneth.com</a></td>
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## ATTORNEY & ACCOUNTANTS

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- Yvonne Cort, Esq. (IRS & NYS) (516) 931-8100
- Brian Gordon, CPA (NYS) (516) 510-6041

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