A Message from the President

Was it just me this year or did everyone feel like the October 15th deadline seemed to sneak up on us out of nowhere? I would like to wish all of you luck in getting done over the next two weeks and to remind you, that this year more so than most, to take advantage of the downtime that traditionally follows to preparing for the upcoming busy season. Can everyone say 199A?

While all of our various committees are hard at work holding seminars in October & November to help us all prepare for the upcoming season, we also have some other great events coming up as well.

Starting with our rescheduled Kickball Event on October 17 brought to you by the NextGen committee; this is NOT just for the NextGen. Everyone is invited to come and have great time.

Be sure to check our full calendar for November as we have the annual all-day joint chapter A & A conference on November 9, as well as the usual committee events throughout the month.

November 14 will be our 3rd Annual Student CPAFest at Chateau Briand. This is an amazing opportunity for the small and midsize firms to have an opportunity to recruit interns and hire students. Last year we had 16 firms take tables as hundreds of students came from all over Long Island, NY, NJ and CT.

The Attorney & Accountant Joint Committee will be holding their semi-annual Networking Event on November 27 again this year at the Fox Hollow. Last year’s turnout was one of the best ever and with good reason; it was an incredibly enjoyable evening of networking, and the profits go to charity.

To end November, we have the Annual Tax & Financial Planning Conference which can be attended on either November 30 or December 1. Please check the flyer on page 23 for a listing of the topics and speakers.

Now a plea for help on behalf of the Chapter, If you are reading this newsletter, if you are attending our committee events or any of our networking events, consider taking the next step, get involved—new blood and new ideas to keep our committees fresh are always needed. I promise you the time you give when you get involved is nothing compared to what you will get out of it.

On that very note I would like to congratulate Gianluca Carrabs and Lisa Flemen who are the new co-chairs for the 2019 Ellen Gordon CPAs 4(a) Cause 5k Run/Walk. After this year’s great turnout, Kenneth Rick is getting some much-needed relief and assistance after years of running this event on his own.

I look forward to seeing all of you at our upcoming events. Please visit our chapter website, www.nysscpa.org/nassau to register for these and other events.

As always please feel free to contact me at aresnick@wmrcpa.com with any thoughts, questions or comments regarding our chapter.

Best Regards,

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

OCTOBER 2018

Financial Literacy Committee
Saturday, 10/13
Annual Financial Literacy Day
Freeport Library, Freeport
9:00 AM – 2:00 PM

CFO & Financial Executives
Tuesday, 10/16
Cloud & Cybersecurity
Demystified
Deloitte, Jericho
8:00 – 10:00 AM

NextGen
Wednesday, 10/17
Accountants Kickball Event
Field 2, Roslyn
5:00 – 8:00 PM

Small-Firm MAP
Friday, 10/19
New Considerations in Retirement Plans, Back Door
Roths, & Other Options
On Parade Diner, Woodbury
8:00 – 10:00 AM

Accounting/Auditing & Real Estate
Tuesday, 10/23
Business Valuations & Cost Segregation Studies
Marks Paneth, Woodbury
6:30 – 8:10 PM

Management of Accounting Practices
Tuesday, 10/23
Legal Issues
Grassi & Co., Jericho
8:00 AM

Practice Continuity & Succession Planning
Friday, 10/26
Life After the Sale of Your Practice
On Parade Diner, Woodbury
8:00 – 10:00 AM

Student CPA Fest
Wednesday, 11/14
Job Fair, Professional Development, Networking
Chateau Briand, Carle Place
2:30 – 8:30 PM

CFO & Financial Executives
Wednesday, 11/14
Understanding Blockchain
Marcum LLP, Melville
8:00 – 10:00 AM

Management of Accounting Practices
Wednesday, 11/20
Topic TBD
Grassi & Co., Jericho
8:00 AM

Attorney & Accountant
Tuesday, 11/27
Networking Event
The Fox Hollow, Woodbury
6:00 – 9:00 PM

Small-Firm MAP
Friday, 11/30
Peer Review
On Parade Diner, Woodbury
8:00 – 10:00 AM

Taxation & Estate & Personal Financial Planning
Friday 11/30 or Saturday, 12/1
See flyer for topics
Long Island Marriott, Uniondale
Friday 7:30 AM – 3:30 PM
Saturday 8:30 AM – 5:00 PM

NOVEMBER 2018

Accounting & Auditing
Friday, 11/9
All-day Event
Joint Nassau-Suffolk
Radisson Hotel, Hauppauge
8:30 AM – 4:45 PM

Accounting & Auditing
Tuesday, 11/13
How a Banker Reads a Financial Statement
Marks Paneth, Woodbury
6:00 – 6:30 PM Dinner
6:30 – 8:10 PM Presentation

Employee Benefits
Michael J. Corkery, CPA
Tina M. Fasano, CPA
Franco Martorana, CPA

FINANCIAL PLANNING
Pamela Diamond, CPA
Eric M. Kramer, CPA, Esq.
Stuart R. Shapiro, CPA
Scott Sanders, CPA

Small-Firm MAP
Friday, 11/30
Peer Review
On Parade Diner, Woodbury
8:00 – 10:00 AM

Taxation & Estate & Personal Financial Planning
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Member Profile:

Alyssa Popov

Alyssa Popov, CPA and Tax Supervisor at Marcum LLP, is new to the Board at the Nassau Chapter of the NYSSCPA and is enjoying her responsibilities in that capacity. Since joining, she has been involved in planning upcoming events and in voting how to use funds to best benefit members. As she explains it, “We all have a fiduciary duty to the Chapter. This means attending all Chapter meetings, being informed and attending organization activities, as well as making sound decisions that benefit both the Chapter and its members.”

In addition to her Board obligations, Alyssa also Co-Chairs the Chapter’s NextGen Committee and takes her responsibilities there very seriously. “As Chairs of the Committee, we are required to come up with events that we think will encourage young CPAs to participate. Once our Committee has decided on a number of events, it is our responsibility to coordinate that event by planning, promoting and participating.”

Challenges do come along with the role, however: “Our current biggest challenge is getting a large enough group of people involved in our networking events, as currently it seems that young CPAs are not as interested in networking as they should be.” But through perseverance and creativity, and by hosting very different kinds of activities for the group, Alyssa and her Co-Chairs have been successful in creating galvanizing events to bring new, younger members into the Chapter.

Maybe this is because Alyssa is no stranger to challenges, as she’s faced them in her own personal life for some time. Just recently, Alyssa’s sister became very ill and lost her child, at the same time Alyssa was pregnant with her own first child. The tragedy of her sister’s situation mixed in with her joy at giving birth to her own child was an extreme shock to the system and truly altered her whole outlook on life: “It gave me a new perspective on my pregnancy and on life overall. You never know when the unexpected can happen and unfortunately life works in mysterious ways. I can’t imagine what my life would be like without my daughter, and I know how difficult it is for my sister every day to know that she lost her child, and the odds of her having her own child in life now are very slim.”

Alyssa counts her sister as one of her main inspirations, both professionally and personally. Despite all of her sister’s health problems (spending months in the hospital) and the trauma she feels from losing her child, she is able to get up every day and go to work as a Nurse Manager, as well as spend time with family and friends, and simply find beauty in life.

Alyssa has had inspiration in her professional life as well, and both mentors work at her chosen firm, Marcum LLP. Kristina Albarella, CPA and Corporate Tax Director at the firm, is also a NYSSCPA Board Member and mentored Alyssa in her efforts at networking. “She would bring me to events and introduce me others. She taught me to overcome my fear of speaking to strangers and how to present myself, my firm and my strengths to others.” Kristina has been Alyssa’s ally since she began work at Marcum.
Karen O’Connor, a Director at Marcum, mentored Alyssa with respect to the CPA exam. “She dedicated her time to helping me create study schedules and made sure that I stayed on track,” remembers Alyssa. “She was there through the failures and my ultimate passing. Without her support, I may have still been taking the exam.”

She passed with flying colors, however, and has been practicing at Marcum since 2012. Alyssa began working there even earlier, however, after interning for the prestigious firm while attending St. John’s University, where she achieved both a BS and an MS in Accounting. She officially joined Marcum almost seven years ago.

As a Tax Supervisor with the Melville-based practice, her responsibilities include reviewing tax returns and provisions, as well as managing staff and their schedules. She specializes in tax provisions (ASC 740), corporate taxes and S corporations.

Alyssa finds her work there to be fast-paced and stimulating. Working for multiple partners tends to be challenging but she appreciates being recognized for all of the hard work she puts in throughout the year.

While she’s not working, and not tending to her adored seven-month-old baby girl, Giavanna, Alyssa enjoys spending time with friends, going to the beach and binge-watching favorite series with her husband, including Law & Order SVU and Bones.

Going forward in her work with the NextGen Committee, Alyssa is excited to see just where the journey will take her and works with others in the community to drive that goal forward. She has a clear idea of the direction she thinks the Committee should take. “The objective of this Committee is to encourage and promote the participation of those members that are new to the profession. It should strive to be a means of increasing the interest and involvement of new CPAs in the Society, and to increase the profile of CPAs in the community.”

“To achieve this goal, the committee should focus on soliciting feedback from new CPAs in public, private and governmental practice to determine what they expect from the NYSSCPA and what they would like the NYSSCPA to do to help them in furthering their careers.”

She also sees that there are fresh avenues to explore that will attract new members who are working in more modern ways: “The next generation of accountants are so technologically sound that our profession needs to continue to upgrade the uses of technology in preparation and consulting. Also, as remote work situations seem to intrigue the younger generations, firms may need to open up to the idea that their employees may want to work from home more often, work in open concept spaces, etc.”

Both professionally and personally, Alyssa’s goals are all about continued success: Within 5-10 years, she hopes to move up the corporate ladder at Marcum, with the ultimate goal of becoming Partner. She also looks forward to having another child, when the time is right, and to increase her responsibilities on the NYSSCPA Board.

In addition to everything else on her plate, Alyssa takes time out of her busy schedule to give back where she can, and will participate in a Lupus Walk later this month. Her sister was diagnosed with this serious illness six years ago, and by participating in this charitable endeavor, Alyssa hopes to do her part in helping researchers to one day find a cure for this debilitating disease.
IN THE NEWS

Committee Spotlight:

Cooperation with Educational Institutions Committee

According to universally beloved, Nobel Prize-winning, humanitarian leader Nelson Mandela, “Education is the most powerful weapon which you can use to change the world.” Anthony Basile, PhD, CPA, CVA, CVE, and President of Anthony Basile, CPA, P.C., as well as Associate Professor of Accounting, Taxation, and Legal Studies in Business at Hofstra University, knows this to be definitively true. The Nassau Chapter of NYSSCPA also realizes that this seemingly simple but revelatory axiom is the key to its Chapter’s future. That’s precisely why they began the group known as the Cooperation with Educational Institutions Committee, which meets every few weeks before their annual event to see just how they can bring together university students and accounting firms, for the greater good of both.

Joining the Committee just five years ago as one of its Chairs, Anthony was immediately committed to this idea of bringing together the two disparate worlds. Because he was a university professor, and had daily interactions with his students regarding their professional lives after college, he came up with an outside-the-box idea to transform the group radically. The concept was to move the group away from its usual staid annual dinner (where small firms met with young applicants and entrees into the accounting world) to an event that focused on a meeting of the minds with the students themselves, often before these young adults have even decided to become accountants. So, with Anthony Basile leading the way, the CPA College Fest was born and the rest is history. This move was a game changer, for both the Committee and the Chapter.

The job fair is extremely popular, both with students and accounting firms alike. “The first year we held the job fair at Hofstra,” recounts Anthony. “Last year it was held at Chateau Briand in Carle Place. Starting at 2:30pm, we begin with four heavily attended workshops, then a dynamic panel discussion (which I moderate), with members who are in practice and industry. Afterward, we have a networking hour [accompanied by delicious cuisine] and then the job fair.”

The job fair’s attendance reflects its popularity—last year 160 attended, 140 of them students. They come from all over New York and even as far as Connecticut and Albany, but the 15 or 16 schools represented are mainly from Nassau, Suffolk and Queens counties.

The Cooperation with Educational Institutions Committee has a dozen members working to make this successful event happen each year. They do so by reaching out to representatives in local colleges, including SUNY Old Westbury, Molloy, Hofstra, LIU and Adelphi, to name but a few.

“We did it [the Committee’s annual event] the traditional way the first year, but then I said, if the goal is to get people jobs, let’s focus on the people who are actually looking for jobs. So that’s what we did…”

— ANTHONY BASILE, PhD, CPA, CVA, CVE

“‘We did it [the Committee’s annual event] the traditional way the first year, but then I said, if the goal is to get people jobs, let’s focus on the people who are actually looking for jobs. So that’s what we did…’”

— ANTHONY BASILE, PhD, CPA, CVA, CVE
position of being both a practitioner and an academic. What I said when I took over, is that there’s a big disconnect between the State Society and the college student. I would hear from another Committee that I used to Chair that students always pick big firms and not small firms. Then I realized that I can solve both of these problems by giving smaller firms access to students and providing students undivided attention from small- and medium-sized accounting firms, as well as focus from the State Society.”

Just last year, in his role as NYSSCPA Nassau Chapter President, Anthony Basile was responsible for almost 4,600 members, making sure that the Society was moving forward in their goal to recruit new accountants and to have a more active, younger membership. “When I got sworn in as President, my theme at the dinner was to Bridge That Gap. The journal we gave out at my installation dinner was titled “A Bridge to Academia.” I saw that we truly needed to build a bridge, because there was definitely a gap in that area. The State Society executives obviously agree with me because they keep agreeing to fund our event.”

The event itself is modestly priced for all firms attending: “We charge the firms that are recruiting a modest amount, only $250 a table,” says Anthony. “We do have sponsorship from some CPA Review courses and at the job fair, they always present a talk about what’s new on the CPA exam.”

As President of the Nassau Chapter until just recently, Anthony reminisces about the role, and why he took it on: “I liked the Presidency…there are a lot who take it on and then count the days until it’s over. Yes, it was a lot of work but I felt that if I was going to do it, I’d make sure to do something impactful and meaningful. I already had enough professional accomplishments and degrees. I didn’t need this (the Presidency) to complete my career, but one of the former Presidents, when they were talking me into sitting on the board, said that you should do this, because we really do have to close the gap between the Society and schools.”

“The Presidency was wonderful, but it was a juggling act, so I’ve always tried to do what’s important and right in front of me. And there is no question, I said it even when I was President of the Chapter, that I chair the best Committee. We have only hard-working people in this group. We start meeting in February, and we plan this event all year. We meet once every three weeks, depending on my teaching schedule, and we hammer everything out.”

The 12 committee members work together to get the job fair word out. “Each handles a specific role—some contact firms for participation, some for sponsorship, and some deal with the catering and menu. So we have a lot of different aspects to handle and a lot of people to do it,” recounts Anthony.

There are challenges to this process, however. The biggest one, perhaps, is in getting some of the schools to promote the event. “There are some schools that have very, very engaged career centers and some that don’t,” says Anthony. “It’s almost like they’re not interested. Sometimes we’ll reach out to the faculty directly, if they don’t have a career center. Some will get the word out and some won’t. Another issue is that we don’t have much money to allot to this, really. We could put an ad in Long Island Business News but then the students might not see it. So now we’re relying more and more on social media to try and get students there. Our younger members are helping us in this area, posting info on Facebook and Twitter especially.

Looking ahead, Anthony’s main goal for the Committee is its expansion: “I’d like this Committee to grow. I’d like it to have more students and more employees … I think the entire State Society should adopt this method [of the job fair] and get more people involved.”

— ANTHONY BASILE, CPA

“I’d like this Committee to grow. I’d like it to have more students and more employees … I think the entire State Society should adopt this method [of the job fair] and get more people involved.”

— ANTHONY BASILE, CPA

The CPA College Fest takes place at Chateau Briand on November 14 at 2:30pm and promises to be, once again, very well-attended and an informative, exciting experience for all.
Installment Agreements: The Eight Top Tips You Need To Know

By Yvonne R. Cort, Esq., Partner at Capell Barnett Matalon & Schoenfeld LLP

After the October filing deadline has come and gone, you may have one or more clients who have not paid all the tax shown on the filed return. If an Installment Agreement or other resolution is not established, the IRS could levy bank accounts and take other collection action. An IRS Installment Agreement can prevent your client’s passport from being revoked. For NYS liabilities $10,000 and over, a NYS Installment Payment Agreement can stop your client’s driver’s license from being suspended.

An Installment Agreement is a formal arrangement which allows the taxpayer to pay monthly, usually until the balance is fully paid, with interest and penalties continuing to accrue. The IRS typically requires submission of detailed financial information, on a Form 433-A (for individuals; Form 433-B for businesses) so the IRS can evaluate the taxpayer’s income, expenses and equity in assets, to determine acceptable terms. The IRS often files a lien to protect the IRS’s rights, either prior to or when the Installment Agreement is set up.

Here are some important points to keep in mind when considering an Installment Agreement for your client:

1. Is an Installment Agreement really necessary? If the taxpayer needs only a month or two to pay in full, the IRS may agree to a hold on collection while the taxpayer is putting the funds together. Interest and penalties will accrue.

   NYS TIP: NYS may also agree to a temporary hold on collection upon request, pending payment in full.

2. Watch out for liens! The IRS may make a determination to file a Notice of Federal Tax Lien ten days after actual or attempted contact with the taxpayer, regarding the balance due. If seeking to negotiate an Installment Agreement without a filed tax lien, it is important to reach out to the IRS as soon as possible, and before a lien is filed.

   NYS TIP: The State typically files a warrant in connection with an Installment Payment Agreement. A warrant generally remains in place for twenty years unless the liabilities are satisfied sooner.
3. **Is the assessed IRS balance $50,000 or less?** If so, an individual taxpayer may be eligible for a streamlined Installment Agreement without submission of detailed financial information. The liabilities must be fully paid within 72 months, or prior to the expiration of the statute of limitations on collection if sooner. If payments are by direct debit, no lien determination is necessary — a good reason to contact the IRS before a lien is filed.

4. **How about $100,000 or less?** The IRS has a test program of an expanded streamlined Installment Agreement, which allows 84 months to pay assessed balances up to $100,000, for qualified individual taxpayers. Detailed financial information is not required when payment is by direct debit. A lien will be filed.

5. **Be aware of existing Installment Agreements.** A new assessment will likely cause an existing Installment Agreement to default. It is more difficult to reinstate an Installment Agreement or to renegotiate if the taxpayer has multiple years of inadequate withholding or estimated payments.

   **NYS TIP:** The State may request that the existing Installment Payment Agreement be paid in full, before agreeing to an Installment Payment Agreement for a new assessment.

6. **Find out if your client will be current for next filing season.** The taxpayer must pay all taxes including estimated taxes while the Installment Agreement is in effect. A taxpayer who will have a balance due next tax year is likely to default the Installment Agreement. Withholding may need to be increased, or more estimated tax paid.

7. **Consider applying online.** For qualified taxpayers, an IRS Installment Agreement can be set up online. Note that all tax returns with outstanding balances must be filed and fully processed.

   **NYS TIP:** The State recently enhanced its online services, with a facility for setting up an Installment Payment Agreement online for amounts of $20,000 or less, with payment in full in three years.

8. **Still can’t pay in full?** There may be other alternatives. An IRS Partial Payment Installment Agreement allows eligible taxpayers to pay over time, even if the payments won’t satisfy the liabilities in full within the statute of limitations on collection. For taxpayers with financial or other hardship, the best answer may be “currently not collectible” status. Another option could be a settlement through an Offer in Compromise.

The technicalities and variations of Installment Agreements can be used to your client’s advantage. Tax professionals need to be aware of available options, to assist taxpayers in finding the best way for them to stay compliant with the tax laws.

*Yvonne R. Cort, Esq., focuses her practice on the resolution of IRS and NYS tax controversies. She is a partner with the law firm of Capell Barnett Matalon & Schoenfeld LLP, with offices in Jericho, NY and New York City. Yvonne can be reached at ycort@cbmslaw.com.*
Look for our 2018-2019 Sponsorship Opportunities coming soon.

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.
FINANCIAL LITERACY DAY

SATURDAY, OCTOBER 13, 2018
9:00 AM - 2:00 PM

Freeport Library
144 W. Merrick Rd, Freeport, NY 11520

Admission is free

No age limit

Sponsored by NYSSCPA Nassau Chapter
Financial Literacy Committee and our friends at FPA-LI

Call Larry Just at 631-428-4829
The NextGen Committee of the Nassau Chapter of the NYSSCPA is proud to host

**Accountants’ Kickball Event**

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: Jean David Chery c/o Grassi and Co
50 Jericho Quadrangle, Ste 200
Jericho, NY 11753
Phone: 516-336-2456
Email: JChery@grassicpas.com
Pay by Credit Card:
https://cpe.nysscpa.org/product/29415
to register online via PayPal
No PayPal account necessary.

New Date:
October 17th, Wednesday
5:00 PM to 8:00 PM

Location:
Field #2 at Christopher Morley Park
500 Searingtown Rd N., Roslyn, NY 11576

Refreshments:
Sandwiches and salads will be served. Water and soda will be available to all participants. Select beer will be available for participants 21 years and over.

Registration Fee:
$20 per person with registration, $25 at the event.
October 19, 2018

New Considerations in Retirement Plans, Back Door Roths & Other Options

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 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.
SAVE THE DATE
Tuesday, October 23, 2018
6:00 - 8:00 PM

Topic: Business Valuations & Cost Segregation Studies

Speakers: Mark Rodriguez, ASA, MRICS & Scott McMahon, ASA, MRICS
MR Valuation Consulting

Location: Marks Paneth LLP
88 Froehlich Farm Blvd.
Woodbury, NY 11797

Cost: $25 (sandwiches & refreshments will be served)

CPE Credits: 2

Course Code: Pending

Contact: Deana Wetzel
516-992-5746
dwetzel@markspaneth.com
Upcoming Meetings

Tuesday, October 23, 2018
Speaker: Thomas R. Manisero, Esq.
Topic: Legal Issues

Tuesday, November 20, 2018
Speaker and Topic to be announced.

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
Practice Continuity Committee

Life after the Sale of Your Practice
Presented by the Capital Group Private Client Services Group

Friday, October 26, 2018, 8:00 AM

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

Ginette Morris
Tel: (516) 681-1121
Craig Morris & Company
Fax: (516) 681-1203
356 South Oyster Bay Road
Email: ginette@morriscpas.com
Syosset, NY 11791

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, October 25).
☐ 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:
Nassau Chapter Practice Continuity Committee

On July 27, 2018, the Nassau Chapter Practice Continuity Committee held its first breakfast meeting of the new Chapter year. Our meeting covered planning for our 2018–19 meetings along with the topic “Peer Review Changes, Requirements and How They Affect All Firms.” The agenda was covered by Tom Linder, CPA, who is a long-time practitioner and a peer reviewer. Tom addressed the many significant reasons for changes in peer review requirements, and other important matters, including:

- who must now have a peer review;
- what is a reviewer looking for and how to prepare;
- changes in the administrator from New York to Pennsylvania;
- changes in the administrative system from PRISM to PRIMA;
- elements of quality control;
- System vs. Engagement reviews;
- Reporting: Pass vs. Pass with Deficiencies vs. Fail and conditions resulting in each.

Thanks to Tom for helping us understand a fairly complex system and the many recent changes resulting from the new Peer Review Law signed last October.

In planning the 2018-19 year, we set our future meeting schedule tentatively, as follows:

- **October 26, 2018** – the topic planned is “Life after the Sale of Your Practice,” presented by the Capital Group Private Client Services Group. The agenda is expected to include:
  o preparing emotionally for leaving your firm and moving on to the next stage of life;
  o how a sale affects you and your family;
  o your expected lifestyle post-sale and how to achieve it;
  o transaction issues, including the uncertainty of a deal that’s contingent on retention or financial targets and;
  o should you work after selling your practice for economic, financial or social reasons or just make the break?

- **January 25, 2019** – “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 October 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*
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, most of our meetings are held in great space in Jericho. 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>10/16/18</td>
<td>Cloud &amp; Cybersecurity Demystified</td>
<td>Deloitte/Jericho</td>
</tr>
<tr>
<td>11/14/18</td>
<td>Understanding Blockchain</td>
<td>Marcum/Melville</td>
</tr>
<tr>
<td>12/13/18</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>
</table>

**Dates for the following seminars will follow in the next newsletter:**

- Employment Law
- Healthcare & Benefits
- Understanding Bankruptcy

**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
Marcum/Melville – 10 Melville Park Rd, Melville

**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.*
UPCOMING MEETINGS AND EVENTS

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

How a Banker Reads a Financial Statement
TUESDAY, NOVEMBER 13, 2018

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

Speaker: Daniel Markus
Valley National Bank

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

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

Designed for: Professionals involved in real estate engagements.

Course Level: Basic

Course Code: TBD

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.

ACCOUNTING & AUDITING COMMITTEE
TUESDAY, NOVEMBER 13, 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:
NYSSCPA NASSAU CHAPTER PRESENT
STUDENT CPA COLLEGE FEST
WEDNESDAY, 11/14/2018
@ Chateau Briand
440 Old Country Rd.
Carle Place, NY 11514

PROFESSIONAL DEVELOPMENT
Learn valuable branding and networking tips, CPA review insight, networking skills and most importantly, how to get hired.

NETWORKING AT NIGHT
Meet with LI public accounting firms looking to recruit and hire for student internships and full-time employment.

AGENDA:
2:30-3PM: How to Land an Interview
3-3:30PM: Networking With Confidence
3:30-4:30PM: Learn About the CPA Exam
4:45-5:45PM: Panel Discussion
6-8:30PM: Networking & Job Fair

DRESS PROFESSIONALLY | BRING RESUMES | FOOD & REFRESHMENTS
QUESTIONS? CONTACT: NYSSCPACOLLEGEFEST@GMAIL.COM

RAFFLE: FREE CPA REVIEW COURSES!!

$10 FOR STUDENTS
Click Here to Register

JOB FAIR!!
The Attorneys and Accountants Joint Committee, in cooperation with the Nassau Chapter of the NYSSCPA and the Nassau County Bar Association, will be mingling and fundraising for Family Residences and Essential Enterprises, Inc. (FREE). Enjoy a multi-course fabulous cocktail style dinner and open bar throughout entire event. Additionally, the FREE Ensemble will perform a short rendition of their talents for us!

**Fundraising raffles throughout the event!**

Bring a non-perishable food item and your business card for a free raffle ticket! All food donations will go to the Interfaith Nutrition Network (INN). Net proceeds from the event will benefit FREE.

Register and pay online at this link: https://cpe.nysscpa.org/product/29786 or complete and mail the form below.

Mail to: Kathleen Becker
Marcum LLP  |  10 Melville Park Road  |  Melville, NY 11747
Phone: (631) 414-4404  |  kathleen.becker@marcumllp.com

Enclosed is my check for $(             ) at $70 per person, ($80 at the door) payable to “NYSSCPA, Nassau Chapter.”

Name ____________________________________________________________
Address __________________________________________________________
Email _____________________________________________________________
Firm Affiliation __________________________________________________________
Phone ________________________________

*Attendance is limited to attorneys and accountants only.*
NYSSCPA SMALL-FIRM MAP
Meeting Topics 2018-2019

Dates & Topics subject to change.

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friday, November 30</td>
<td>Peer Review</td>
<td>Stuart Lang, CPA</td>
</tr>
<tr>
<td>Friday, December 14</td>
<td>New Tax Law &amp; Pre-Tax Season</td>
<td>TBA</td>
</tr>
<tr>
<td>Friday, January 18</td>
<td>NY Estate Planning</td>
<td>TBA</td>
</tr>
<tr>
<td>Wednesday, February 20</td>
<td>Early Tax Season Issues</td>
<td>Round Table</td>
</tr>
<tr>
<td>MARCH – NO MEETING</td>
<td></td>
<td></td>
</tr>
<tr>
<td>April Date TBD</td>
<td>Post Tax Season Blues</td>
<td>Round Table w/NCCPAP</td>
</tr>
<tr>
<td>Wednesday, May 15</td>
<td>Mergers &amp; Acquisitions</td>
<td>TBA</td>
</tr>
<tr>
<td>Wednesday, June 12</td>
<td>Residency Audits &amp; Issues</td>
<td>Karen Tenenbaum, Esq.</td>
</tr>
</tbody>
</table>

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

You can contact your Co-Chairmen as follows:

Eliot Lebenhart, CPA            | Kenneth Hauptman, CPA                     | Alex Resnick, CPA         |
(516) 294-0400                  | (516) 364-8888                            | (516) 364-8888            |

*Please note: meeting dates, topics, and speakers are subject to change.*
November 30, 2018

TOPIC: Peer Review

Speaker: Stuart Lang, CPA
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 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 MEETING

November 30, 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
Presented jointly by the Taxation and Estate & Personal Financial Planning Committees of the New York State Society of Certified Public Accountants

Nassau Chapter 66th Annual All-Day Tax Conference

Friday, November 30, 2018 OR Saturday, December 1, 2018
Long Island Marriott Hotel & Conference Center, 101 James Doolittle Boulevard, Uniondale, NY

Friday: 7:30 AM – 3:30 PM  (Check-in begins at 7:00 AM)
Saturday: 8:30 AM – 5:00 PM  (Check-in begins at 8:00 AM)

CONFERENCE TOPICS & SPEAKERS

TOPICS
• Learn about the Sec 199A Deduction, Interest Expense Limitations, NOLs and Much More!
• Federal and New York State Tax Updates including the Effects of Final or Proposed New Tax Laws
• Passive Activity Losses and New Aggregation Rules for Sec 199A
• Estate Tax Reform & Update - Potential Changes and How They Will Affect You and Your Clients
• IRS and NYS Collections and Tax Controversies including Levies and Liens

SPEAKERS
• Robert S. Barnett, CPA, Esq., Capell Barnett Matalon & Schoenfeld LLP
• Yvonne R. Cort, Esq., Capell Barnett Matalon & Schoenfeld LLP
• Joseph Endres, Esq., Hodgson Russ LLP
• Marisa Friedrich, Esq., Tenenbaum Law, PC
• Leo Gabovich, Esq., Tenenbaum Law, PC
• Neil D. Katz, Esq., Katz, Smith & Chwat PC
• Eric M. Kramer, CPA, Esq., Farrell Fritz, PC
• Karen J. Tenenbaum, Esq., LLM (Tax), CPA, Tenenbaum Law, PC

Conference and Committee Chairpersons:
Robert S. Barnett, CPA, Esq., Capell Barnett Matalon & Schoenfeld LLP
Pamela Diamond, CPA, PFS, Creative Wealth Builders, LLC
Eric M. Kramer, CPA, Esq., Farrell Fritz, PC
Scott Sanders, CPA, PFS, CGMA, CFP, CFS, Getty Marcus CPA, P.C.
Robert J. Schaffer, CPA, Castellano, Kornberg & Co., CPAs, PC
Stuart R. Shapiro, CPA, PFS, Shalik Morris & Co. LLP

Program Details

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

Course Details

Course Level: Update
Prerequisite: None
Method of Presentation: Lecture
Field of Study: Taxation
Recommended CPE Credit Hours: 8
Developer: Foundation for Accounting Education
Course Code: Fri 28603923
Member Fee: $175
Non-member Fee: $250

Register online at www.nysscpa.org.
Register by fax at (866) 495-1354.
Register by phone at (800) 537-3635.
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 PM – 6:30 PM Dinner
6:30 PM – 8:10 PM Presentation

Design for: Professionals involved in real estate engagements.

Course Level: Basic

Course Code: TBD

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.

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

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☐ 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:
Save the Date

Nassau Chapter

66th ANNUAL
INSTALLATION DINNER

THURSDAY, MAY 30, 2019
6:30 P.M.
CREST HOLLOW COUNTRY CLUB
WOODBURY, NY
8-8 Networking Event Blurb

On August 8, the 7th Annual Supersized Networking Event was held at the Woodbury Country Club. The event was a joint chapter event sponsored by the Nassau & Suffolk chapter’s NextGen committees. We had a great turnout, nice weather and there was lots of networking going on!
Golf Event

Our chapter’s annual golf event was held at North Hills Country Club in Manhasset on August 9 which was a beautiful sunny day. There was golfing followed by a sumptuous dinner where prizes were awarded.
9-20 Networking Event

The Nassau Chapter Networking with Accountants and Other Professionals and the Suffolk Bankers/CPA Committees held a joint networking event on September 20 at Jewel Restaurant in Melville. The event was well attended and enjoyed by all who attended.
Committee Service Application

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: ________________________________________________

Committee Service Application

Accounting & Auditing
Attorney & Accountants
CFO & Financial Executives
Cooperation with Educational Institutions
Employee Benefits
Estate & Personal Financial Planning
Financial Literacy
Litigation & Forensic Service
Management of Accounting Practice
Membership
Small Practice MAP
Newsletter Sponsorship
NextGen Taxation
Practice Continuity
Real Estate
Women’s Focus Group
Other ______________________________________________

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

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

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
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
- Small Practice MAP
- Newsletter
- Sponsorship
- NextGen
- Taxation
- Practice Continuity
- Women’s Focus Group
- Real Estate
- Other

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

---

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e-mail: vivianlevy1@gmail.com

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Connect With Us On LinkedIn
http://www.linkedin.com/groups?gid=5010322&most-Popular=&trk=tyah&trkinfo=tas%3Anysscpa%20nas

**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. Tenenbaum, Esq. (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

Lynne M. Fuentes, CPA | Fuentes & Angel CPAs LLC
420 Jericho Turnpike, Suite 321, Jericho, NY 11753 | Phone: (516) 656-0800
lynn@fuentesangelcpas.com

Vivian Levy | NYSSCPA Nassau Chapter
c/o KVLSM LLP, 415 Crossways Park Drive, Suite C, Woodbury, NY 11797
Phone: (516) 294-0400
vivianlevy1@gmail.com

Natalie Verbanac, CPA | Marcum LLP
750 3rd Avenue, New York, NY 10017 | Phone: (212) 485-5550
natalie.verbanac@marcumllp.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
  - November ...................... October 1
  - December ..................... November 1
  - January ....................... December 1
  - April ........................ March 1
  - May ............................ April 1

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

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Connect With Us On LinkedIn
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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