A Message from the President

Happy New Year to all our NYSSCPA—Nassau Chapter members. I hope you all were able to enjoy a little bit of a break and enjoy the season with friends and family. Hopefully that time will help to carry you through what is now about to be busy season for many of us. For me, personally, that time away from the family has always been the hardest part of it.

As we move forward in 2019, I would like to thank all our Chapter officers, directors and committee chairs for all you did last year. Your hard work and dedication gave our chapter a great year. Social and networking events, charity events, technical events and of course our COAP program were all amazing and your hard work is what made them happen. Your continued work in the New Year will ensure that the Nassau Chapter remains the best and most active chapter in the state.

For the Chapter, December did not go quietly. It was filled with technical events from various committees to help you get ready for the upcoming tax season, the largest of which was the all-day tax event, and I need to extend a special thank you to Robert Schaffer, Robert Barnett and the entire tax committee for all the hard work they do for this event. Your months of planning does not go unnoticed or unappreciated.

January is probably our busiest month of the year, leading off with our NextGen committee hosting their Networking in the New Year Event on January 8 at Round 1 Entertainment in Hicksville. See the enclosed flyer for full event details and registration for this fun evening.

Our first major technical event is probably also our largest of the year, our Ethics Event and Annual Town Hall Meeting on January 9. We are again honored to have Ernie Smith as our speaker for this evening. Prior to the Ethics event, that evening will also be our annual managing partners meeting with NYSSCPA president Jan C. Herringer. This meeting gives the opportunity to hear from the president of the NYSSCPA about the direction and plans for the society, as well as for us to share our thoughts and opinions regarding these matters. In the past it has proven to be an incredibly productive opportunity for our Chapter to give our input into those matters, as well as others. Managing Partners and Partners in charge if you would be interested in joining us for that meeting please contact our President elect, Natalie Verbanac (natalie.verbanac@marcumllp.com) or myself.

The very next night, our Woman’s Focus Group will be holding their Post-Holiday Cocktail Party and Shoe Drive at the Garden City Hotel. Please join them for an evening of networking with other female professionals, and please bring your unwanted new or gently used shoes.

January 31, jointly with the Suffolk Chapter, we will hold our annual Networking with Accountants and other professionals event at the Fox Hollow in Woodbury, this is a great evening of networking with both your fellow accountants and other professionals from all over Long Island.

We hope you will join us for these, as well as the different technical meetings that your chapter’s various committees sponsor throughout the month.

While it is still five months away, please save the date for our 2019 Installation Dinner which is scheduled for May 30, 2019 at the Crest Hollow Country Club. Sponsorships are now available with discounts for early registration. See the flyer in this newsletter for full details.

As always your comments, suggestions and questions are welcome, please feel free to contact me at aresnick@wmrcpa.com.

Wishing you all a very Happy and Healthy 2019.

Sincerely,

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

JANUARY 2019

NextGen Committee
Tuesday, 1/8
Networking in the New Year
Round 1 Entertainment, Hicksville
6:00 – 9:00 PM

Ethics Update
Wednesday, 1/9
Chateau Briand, Carle Place
Managing Partner Mtg.
4:00 – 5:00 PM
Cocktails, Dinner, CPE
5:30 – 9:00 PM

Women’s Focus Group
Thursday, 1/10
Post Holiday Cocktail Party
Shoe Drive
Garden City Hotel, Garden City
6:00 – 9:00 PM

CFO & Financial Executives
Thursday, 1/17
Healthcare and Other Employee Benefits
Dolittle, Jericho
8:00 – 10:00 AM

Small-Firm MAP
Friday, 1/18
New York State
Estate Planning
On Parade Diner, Woodbury
8:00 – 10:00 AM

Practice Continuity Committee
Friday, 1/25
Cybersecurity Threats and Solutions for CPAs
On Parade Diner, Woodbury
8:00 AM

Networking with Accountants
Thursday, 1/31
Joint Nassau/Suffolk Networking Event
The Fox Hollow, Woodbury
6:00 – 9:00 PM

UPCOMING 2019 MEETINGS

CFO & Financial Executives
Wednesday, 2/6
Banking & Economic Update
Wells Fargo, Melville
(FEI Event)
8:00 – 10:00 AM

Small Firm MAP
Wednesday, 2/20
Early Tax Season Issues
On Parade Diner, Woodbury
8:00 – 10:00 AM

CFO & Financial Executives
Wednesday, 3/20
Leadership Skills
Location To Be Determined
8:00 – 10:00 AM

Practice Continuity Committee
Friday, 4/26
Planning Retirement & Life in the Retired World
On Parade Diner, Woodbury
8:00 AM

Nassau Chapter 66th Installation Dinner - May 30, 2019
See Flyer in Newsletter on page 10
Craig Morris, CPA, Principal and Owner at Craig Morris & Company, former Vice President at the Nassau Chapter NYSSCPA and Co-Chair at its very successful Practice Continuity & Succession Planning Committee, wasn’t sure where his professional life would lead; that is, until he met one particular professor, (a Mr. Harmon), who helped set him on his path to the world of accounting.

Craig had originally planned on becoming an airline pilot, but after exploring his options in that field, decided it just wasn’t for him. So, after ditching his liberal arts major and turning to business school, he took an accounting class that changed everything for him. He did well in the class and his professor encouraged his efforts and pointed him to Baruch College, as a great business school. It was and he excelled, graduating Cum Laude with a Bachelor of Business Administration degree.

What truly set his career in motion, however, was his experience at Deloitte, then one of accounting’s Big 8 (now Big 4). He began there in 1974, not knowing much about what it was that accountants did. But that quickly changed: “I worked for a firm that was fabulous,” remembers Craig, “and the people there were amazing. It truly changed my life. Working at Deloitte gave me the skills, discipline, training and guidance to become a CPA, as well as the ability to go out and practice on my own. I’ve had two jobs my whole life—one, there, for seven years, and now my own practice for the last 37-plus. I’m a lucky man.”

And his luck began when he started to work with Managing Partner, John Cardis, who was arguably among the most influential people in Craig’s career. “He was just a super guy, well-rounded, positive and a tremendous businessman. I worked for him for six or seven years. He probably pushed me beyond where I ever thought I could go.”

Now, Craig has enjoyed owning and running his practice for almost four decades and ascribes some of his success to two lucky breaks he received early on. “Deloitte gave me the foundation, but it wasn’t where I wanted to stay. I got my last promotion before making Partner and decided not to continue. So I went out and started a practice with a few small accounts, and found two opportunities that truly got the practice rolling.”

“One was that I had a brother who worked at the U.S. Merchant Marine Academy in Kings Point. Just as I was leaving Deloitte, he told me they were soliciting bids for audit services there. It had to be submitted in less than a week, so I put it in quickly and we got the work. We then handled services for various entities of the Academy for 15 to 20 years. It was a big account for us, and we received a lot of valuable experience there.”

Craig’s second big break was when a friend of his from Deloitte went to work at a private company that was acquiring another organization in the emerging cellular telephone industry, in Silicon Valley. “This was around the first or second year that I started my practice. He hired us to work on mergers and acquisitions on the West Coast. It was a tremendous boost to the practice—it truly set the direction of the firm.”

While working on those accounts, Craig Morris & Company also developed a general accounting practice, but didn’t have much experience in tax preparation, since Craig worked in audit services at Deloitte. “I wasn’t really a tax practitioner, but that was basically what small businesses needed. We were doing work for bigger firms that needed auditing, but we were starting to develop services to smaller accounts, so I had to train and learn skills in tax matters. There were a lot of new rules, S Corporation rules
particularly, and I had to learn all of that. So we did and built the practice from there.”

Little by little the practice grew, but not in the direction Craig had intended. So, over time, he narrowed the focus, to mostly accounting assistance, audit and controllership work. “At the beginning we weren’t focused on our core strengths, so we narrowed our focal point and concentrated on our strong areas. Today our largest accounts are mostly audit services, accounting assistance, controllership services and to a lesser extent, individual tax preparation. We focus on not-for-profit organizations, pension-plan audits and have a very large client in the aviation industry that requires specialized audit work in order to do business at airports. Contractual audits are a specialty for us now.”

Craig himself works on administration of the practice, and concentrates on supervision and review of the company’s work. “We’re a small firm so I’m also a service provider, but mostly I work in supervision, review and firm administration.”

Their aviation client requires audit opinions on special contractual agreements. It’s an international company that provides ramp, luggage, boarding gate and terminal services to airports all over the world. “That’s one of our biggest clients and we work for them all over the United States. We’re just now finalizing audits in Miami and Fort Lauderdale, and then preparing to begin in Massachusetts at Logan Airport. We’ve also serviced McCarran International Airport in Las Vegas, Lee County in Fort Myers, Florida, a cold storage facility in Orlando and an aircraft de-icing facility in Philadelphia.”

Business is good but there are challenges that come with any success. “We’re not looking for a lot of growth, but there’s an old adage that if you’re not growing, you’re shrinking. Our clients and professional team are tremendous and keeping them happy is a goal for me.”

Technology is another challenge: “Technology is a huge challenge for us now. At a small firm it’s difficult to provide services and stay leading edge in technology—that is a huge challenge. There are new products in every aspect of what we do. It’s harder for the small firm to identify best products, then train and convert.”

The new tax laws affect the business as well, although maybe not as dramatically as for some of his colleagues at the NYSSCPA. “I’ve been studying the new laws and even though we don’t do a tremendous amount of tax work, I stay involved because it’s important to our clients. I’m really not sure the new law was that well thought-out. Some of the wrinkles make it really complicated. There hasn’t been a change like this since the early 80s, so there’s a big learning curve.”

The rewards Craig receives from his work of course outweigh any challenges he or his employees might face: For him, “rewards come from client satisfaction, doing a great job and having success. Also, in having the clients happy with what we do and benefiting from it. As part of the auditing we do, we try to find things that help them business-wise, not just to do an audit, we look for business ideas and opportunities for them to grow by. When that happens (and that’s hopefully often), and we’re acknowledged for it, it’s very rewarding.”

In his off hours, Craig enjoys family time, the beach, boating and sports, sports. He enjoys hockey, baseball and football, and he has his hometown favorites—the Yankees, the Islanders and the Giants, (but also the Mets and Jets)—all the best (and some not so) that New York has to offer. The Islanders in particular were rooted in his love of both sports and family. He had season tickets for 25 years and his daughter went with him to lots of games.

In addition to sports, Craig is a big reader and an avid traveler, both nationally and internationally. One
day in the Smoky Mountains was particularly memorable since a mama bear and her three cubs crossed right in front of his path, but peacefully, thankfully.

Going forward professionally? “Hopefully I’ll be alive,” Craig laughs. “I like this work and I hope to continue working. I love Florida as well and wouldn’t mind working from there, but my clients and contacts are here. So I’ll just continue with what I’m doing here. I don’t see retirement in my near future, just scaling back a little, giving me more time to travel.”

In addition to his work with the NYSSCPA, Craig has done a lot with the AICPA and is proud of what they do. “They create a lot of tremendous programs; they do national seminars and a practitioners’ symposium that is attended by 4,000 CPAs. They address all aspects of the profession, including practice management, technology issues and you’re surrounded by the best in the profession. You see peers from all over the country that participate like you do. They can have as many as 100 speakers attend, who are the best in the business, so I like what they do and sometimes utilize the resources they provide for the NYSSCPA.”

Craig has been busy in his long and storied accounting career. In addition to running his practice and working with his field’s community organizations, he has also been an adjunct at Adelphi University, for both the graduate and undergraduate schools. He also worked as the Treasurer at the American Red Cross and received an award from them for his “volunteer leadership and dedicated service.”

Since 1981 he has dedicated his time and devotion to the Nassau Chapter NYSSCPA. He sat on the Computer Technology Committee, and later chaired it, as well as the Accounting & Auditing Committee. He founded both the Small-Practice Unit MAP Committee and the Practice Continuity & Succession Planning Committee, where he sits today as Co-Chair.

Additionally, he has sat on the NYSSCPA Executive Board for three separate terms, and served as Secretary, Treasurer and Vice President. He also served as the organization’s Historian and sat on the once-active Newsletter Committee.

So what does the future hold for Craig Morris and all of his good work? It looks as if he will be pushing himself ever further to help both his community of CPAs as well as his esteemed employees and himself, to do the best he possibly can for the clients he values so much.
The great playwright, George Bernard Shaw, once said, "We are made wise not by the recollection of our past, but by the responsibility for our future." And this is what the Co-Chairs of the Practice Continuity & Succession Planning Committee realize as they plan their agendas, topics and speakers to help prepare small-, medium- and even large-sized practice owners for their financial lives and well-being with the succession of their particular firms.

Craig Morris, creator (way back when, in 2008) and Co-Chair of the Practice Continuity & Succession Planning Committee, as well as Principal, Owner and Service Provider at his eponymous firm, Craig Morris & Co., a practice principally focused on audit and accounting services but also dedicated to handling clients’ tax matters, business obstacles and financial planning, knows that every good succession starts with proper planning and that their Committee is a very good start to that process. "Basically, we’re here as a valuable resource for the Nassau Chapter NYSSCPA membership,” Craig relates. “We offer a comfortable setting for networking while attempting to help the CPA community with their continuity concerns.”

Meeting quarterly in January, July, April and October, the Committee hosts their seminars/meetings in a separate space available at the On Parade Diner in Woodbury, where the Chairs themselves or an expert speaker is able to hold court on their chosen topic with some quiet and privacy.

The meetings are usually attended by 35–50 people, most of whom are interested in solving their own continuity issues or in looking to partner with other firms, as well as for networking opportunities or to simply begin to wade into the idea pool of succession—these meetings truly run the gamut in their topics and outcomes.

Craig explains further the range of topics and resources that they provide: "We are here to offer resources; for instance, sample practice continuation agreements, unique reference materials, expert speakers in the field who can address different areas our members might not have heard of before, lawyers for contractual matters, as well as other professionals who work on practice continuation agreements. And it’s always a great networking opportunity."

“Some members come with their own concerns and others to help members address and solve issues. We’ve had people merge their firms and become partners as a result of connecting at our meetings. I know of at least one example of a guy who wanted to retire and found someone at our meeting to come in as a staff member, who subsequently took over his practice. So we truly are a resource for the community.”

“Basically, we’re here as a valuable resource for the Nassau Chapter NYSSCPA membership. We offer a comfortable setting for networking while attempting to help the CPA community with their continuity concerns.”

— CRAIG MORRIS, CPA
CO-CHAIR
Larry Bloom, Co-Chair and Member at BloomSchon CPAs LLC, a full-service tax, accounting and advisory firm, feels that the group’s focus, “is as a source of information for small firms and sole proprietors, to assist them with succession issues, practice continuity, retirement, or even disability, should they be out for a period of time, and in that case, how to deal with staffing issues, etc.”

“We provide a forum, in a sense, for people to come out and network with like-minded professionals, who share their real-life professional and personal situations. We bring in speakers to talk about relevant topics to our group members. We work to bring on NextGen talent as well as the upgrading of our technology, and we hold discussion topics to help people who have retired on how to have a fulfilling life after work is over. CPAs work very hard at their careers and it is sometimes difficult for people who have worked so hard their whole lives (and who maybe don’t have enough hobbies), to enjoy life after. We work with individuals to help them figure out how to slow work down and get their firms ready for succession, or how to sell with an upstream merger, or in having internal talent buy them out.”

Reaching the next generation is difficult with this particular committee, Larry realizes, as the focus is quite literally about working and planning towards the end of one’s professional career. But that doesn’t mean they have to stop trying: “We’ve had joint meetings with the NextGen committee. We try to learn from them to see what their career motivations are and how to change the way we operate, so that we appeal to them. Smaller firms can sometimes be out of touch, so we’re trying to learn what they’re looking for in a work/life balance. When I first began my career, you started on the audit staff; if you were interested in building your tax knowledge, you went back to the office at night to work on tax preparation. Now young people work on one track, either audit or tax. It’s harder for firms to grow because we need people to become more multifaceted.”

Each Co-Chair has their own role in the Committee, but as Larry states, they all assist each other. “My role would be in helping Craig come up with new ideas—that’s our biggest challenge because we’ve been together so long. If you’re a tax committee, there are always new nuances to new tax laws to learn, but how much is new in succession planning? My challenge is to help with that and to seek out captivating speakers and to encourage new people to come down and benefit from all the learning and sharing that we do.”

“My biggest reward in being part of the Committee is in the camaraderie. This is a group of people that I can approach and discuss almost anything with and have an interchange of ideas. We’re informally each other’s board of directors.”

According to Eliot Lebenhart, the third Co-Chair and Partner at KVLSM LLP, “my role is in vetting ideas with Craig and Larry to come up with the best program and speakers. We find the topics in various places and forums. For example, this January’s speaker is someone I found in an article I read in Accountant’s World magazine. But more than just about finding a topic, it’s in arranging how we will handle that topic and lay it out. Sometimes we do it ourselves and other times we bring in speakers.”

For Eliot, the biggest challenge in his role is in the fundamentals: “It’s really about finding topics. We’re running out,” he laughs. “And we need to bring in younger CPAs to the group. Mergers & Acquisitions is looking to transform from gray-haired individuals to those…without gray hair,” he laughs again.

“In regards to myself,” says Eliot, “I was a sole practitioner with eight employees. When I was 55, a client asked me, ‘What if I get hit by the proverbial bus?’ I thought about it, and since I had no partner to lean on, I took that to heart and began to look for a larger firm to merge my practice into. By doing so, I’ve increased my employees and the value of my practice. We can now offer services I did not offer previously. This will all enhance my retirement and my estate.” And this issue is a perfect example of just what it is the Committee covers.

“My biggest reward in being part of the Committee is in the camaraderie. This is a group of people that I can approach and discuss almost anything with and have an interchange of ideas. We’re informally each other’s board of directors.”

— LARRY BLOOM, CPA
CO-CHAIR
Eliot finds the rewards for his role as Co-Chair hit him at home, as well as in ways to improve the Committee itself. “Personally, I get to see new trends and hear what other people need to do for themselves, but also for myself. I see what members are doing to enhance the value of their practices, and we all need to learn that. That’s why people continue to come.”

Looking forward, he sees just where the Committee needs to go: “At some point, the three of us need to transition this Committee to younger people, but as long as there is the continuation of mergers and acquisitions, this committee is going to thrive. We don’t see any sign of decline.”

Craig is looking forward to upcoming Committee events and the next one, held on January 25, will be on the very topical and important issue of Cybersecurity Threats and Solutions. “For that meeting, we will have two speakers, one whom Eliot identified who’s an IT specialist. His name is Jeff Lush (CEO of BAP), and he wrote a big article on cybersecurity for accountants, and on how to protect your firm. The other speaker, Rob Ferrini, is the Program Manager for McGowanPRO, a CPA professional liability firm. He will speak on privacy and security within a CPA firm; on where he sees exposure, and how CPAs can mitigate that exposure with proper insurance.”

“April 26 will be our final meeting of the chapter year and will consist of a panel of CPAs who have retired and who will discuss their initial considerations in planning retirement and their concerns before and after life in the retirement world.”

Craig is hopeful that the Committee will continue to survive and thrive: “The need for what we do isn’t going to go away, the need is always here. Every year we get people over 50 joining our Committee. Some of what we focus on is in making our practices attractive, so discussing cybersecurity will help with that. The future, for us, is basically just sticking to our goal, which is in helping the local practitioner transition successfully. There are so many things that can happen that you have to prepare for, including death and disability. We’ve had meetings with speakers who’ve had tragedy. One guy had a heart attack in the middle of busy season. He talked to our committee about how he came through that and was fortunate enough to have friends who helped him deal with his workload. He also described how it changed him and the way he does business. So for us, it’s about retirement, succession and what happens in the face of death and disability.”

Larry knows that the growth of the Committee is possible but tenuous: “The only way we’ll grow is for younger people to come down and see what we do. A lot of the bigger firms churn ‘em and burn ‘em. So the biggest challenge is in getting the NextGen to come down and see the opportunities in smaller firms and in being their own bosses, controlling their own destinies. I spent my entire career in public accounting. It is very challenging, a lot of pressure, a lot of hours, but also very rewarding. There’s nothing like owning your own business. CPAs like to serve, and we relish our role as a client’s trusted advisor.”

The three Co-Chairs come from very different professional backgrounds and that has only added to the Committee’s strength. According to Larry, “We all started at larger firms—mine was 50-plus people, Craig was at a Big 8 firm, and Eliot was at a 5-person firm and then went to a 30-person firm before going out on his own. And now we’ve all transitioned to smaller firms. We’ve all seen the trials and tribulations of starting our own businesses, had our own employees, seen the challenges of keeping up with technology, in attracting and retaining talent. So we’re all learning. We all share an interchange of ideas about our practices and we’re all there to help each other and our members grow from that acquired knowledge. That’s our purpose.”

“Personally, I get to see new trends and hear what other people need to do for themselves, but also for myself. I see what members are doing to enhance the value of their practices, and we all need to learn that. That’s why people continue to come.”

— ELIOT LEBENHART, CPA
CO-CHAIR
Take advantage of our discount! Purchase your Installation Dinner Sponsorship NOW!

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.

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.
UPCOMING: THE 66TH ANNUAL INSTALLATION DINNER

66th Annual Nassau Chapter Installation Dinner
Thursday, May 30, 2019 | 6:30 p.m.
Crest Hollow Country Club, Westbury

Come Celebrate the 66th Anniversary of the Nassau Chapter

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

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

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

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

** BY CREDIT CARD VIA PAYPAL: Check our website **
* Paypal link for table & individual registrations only. All sponsorships and advertising will be billed by Vivian Levy.*
DISCOUNTED SPONSOR AND ADVERTISING RATES

FOR THE MAY 30, 2019 INSTALLATION DINNER

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

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

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

For Dinner Sponsorship Contract and information
Contact Vivian Levy at vivianlevy1@gmail.com
The Next-Gen Committee of the Nassau Chapter of the NYSSCPA is proud to host

**Networking in the New Year!**

**Register Today!**

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

*Required for credit card payment confirmation.

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

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

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

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

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

**Registration Fee:**
$30 per person with registration, $35 at the event.

- Arcade Games
- Karaoke
- Bowling
- Billiards
NYSSCPA Nassau Chapter
Annual CPA Ethics Update

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

Times:

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

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

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

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

Learning Objectives

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

Register online or call 800-537-3635

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

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

Will be hosting a post holiday cocktail party and shoe drive. Please join us for an evening of networking with other female professionals and bring us your unwanted shoes. *

Thursday, January 10, 2019

Time: 6:00 – 9:00 PM  
Location: Garden City Hotel  
45 Seventh Street  
Garden City, NY 11530  
Cost: $50 per person

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

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

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

Name: ________________________________  
Firm: ________________________________

E-Mail: _______________________________  
Phone: ______________________________

*The Women’s Focus Group is including a shoe drive at our event to benefit the not-for-profit organization SFA, Shoes For All. We kindly ask you to bring and donate any new or gently used shoes for women, men or children. SFA board members will be at the event to collect them that evening. Below is the link for SFA if you would like more information or would like to make a monetary donation directly. Thank you in advance.

https://www.shoesforall-sfa.com/
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:

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<tr>
<th>Date</th>
<th>Topic</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/17/19</td>
<td>Healthcare &amp; Other Employee Benefits</td>
<td>Deloitte/Jericho</td>
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<tr>
<td>2/6/19</td>
<td>Banking &amp; Economic Update</td>
<td>Wells Fargo Melville (FEI Event)</td>
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<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
- Understanding Bankruptcy

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

**Meeting locations:**
- Deloitte / Jericho – 2 Jericho Plaza, Jericho
- Marcum / Melville – 10 Melville Park Rd., Melville
- Wells Fargo / Melville – 58 South Service Road, Melville

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

*Please contact Anthony Aronica or Joanne Krush if you’d like more information.*
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, 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><strong>MARCH — NO MEETING</strong></td>
<td></td>
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<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)

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

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

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

You can contact your Co-Chairmen as follows:

Eliot Lebenhart, CPA  
(516) 294-0400

Kenneth Hauptman, CPA  
(516) 364-8888

Alex Resnick, CPA  
(516) 364-8888

*Please note: meeting dates, topics, and speakers are subject to change.*
January 18, 2019

New York Estate Planning

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

Cost:* Members:
$30 per person paid in advance
$35 per person (includes pre-registered)
paying at the door

Non-members:
$35 per person paid in advance
$40 per person (includes pre-registered)
paying at the door

Checks are payable to: NYSSCPA - Nassau Chapter

Chairpersons:
Alex Resnick, CPA
Eliot Lebenhart, CPA
Kenneth Hauptman, CPA

WE LOOK FORWARD TO SEEING YOU THERE!

*Refund/Credit Policy – If you send payment and are unable to attend the monthly meeting, we will issue a credit to you, which will expire in 6 months. There are no refunds.

Please note - meetings are subject to change. Notifications will be sent to all registered attendees via email should this occur.
UPCOMING MEETINGS AND EVENTS

Nassau Chapter
Practice Continuity Committee

We, at Practice Continuity, hope your holidays were restful and joyful and we wish you a healthy and prosperous New Year. Our meetings are scheduled quarterly and we have two remaining meetings we hope you’ll find interesting.

On January 25, 2019 we will be addressing “Cybersecurity Threats and Solutions for CPAs. At a recent meeting, we presented the topic of Cybersecurity Threats and it was praised as an excellent presentation. Participants then wanted to know what to do about these threats. In response to that, we’ve assembled two experts from two different professions to help us to cope.

Jeff Lush is CEO and Co-founder, BAP Solution, a cybersecurity firm and Jeff is a technologist with more than 34 years of IT experience. You may have seen his article titled “The Why, What and How of Cybersecurity for Accountants: Protect your firm in 10 steps” in AccountantsWorld or CPA Trendlines. Jeff will address the most significant security risks and how to protect your CPA firm.

Rob Ferrini is program manager for McGowanPRO, a leading writer of innovative insurance programs and a provider of CPA professional liability insurance. Rob is responsible for Cyber Liability matters and he will speak on creating a culture of privacy and security within a CPA firm, where he sees exposure and mitigating a firm’s risk with proper insurance, including where the gaps are and where CPA firms are over insured.

We are fortunate to have these two very special experts to address matters that are of major concern today and important in preparing your firm for succession, now or in the future.

April 26, 2019 is our final meeting of the Chapter year. We have assembled a panel of CPAs, who have retired or will soon, from CPA firms we are all familiar with. They will discuss their initial considerations in planning retirement, concerns before and after, and life in the retired world. It is a program that will be of interest to all practitioners trying to create a succession plan.

Please remember to schedule our events on your calendar now, to avoid conflicts. Our meetings are generally held at On Parade Diner, the last Friday of the meeting month, though dates and locations are subject to change. A coupon for the January meeting is included in this newsletter. For more information, on this meeting or our Committee, contact us at ginette@morriscpas.com. We look forward to your participation.

Craig Morris, Chairman
UPCOMING MEETINGS AND EVENTS

Practice Continuity Committee

Cybersecurity Threats and Solutions for CPAs

Friday, January 25, 2019, 8:00 AM

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

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

Checks are payable to NYSSCPA, Nassau Chapter.

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

Name:

Firm Affiliation:

Address:

Email:

Telephone:
UPCOMING MEETINGS AND EVENTS

NYSSCPA Nassau /Suffolk Joint Chapter
Annual Networking Event

Hosted By Networking with Accountants Committee

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

Open to all NYSSCPA Members, Bankers, and other Professionals

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

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

To Register with Paypal: [https://cpe.nysscpa.org/product/29943](https://cpe.nysscpa.org/product/29943)

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

---

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

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

Name:
Email Address:
Company Name:
Address:

Phone:
I am a: [ ] CPA [ ] Attorney [ ] Banker [ ] Other

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

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

Contact Phone Number:

[cpinto@ck-co.com](mailto:cpinto@ck-co.com)
February 20, 2019

Early Tax Season Issues

Speaker: Roundtable
CPE: 2 Credits Pending
Time: 8:00 – 10:00 AM (Be prompt!)
Place: On Parade Diner
7980 Jericho Turnpike, Woodbury
Cost:* Members: $30 per person paid in advance
                       $35 per person (includes pre-registered)
                       paying at the door
Non-members: $35 per person paid in advance
               $40 per person (includes pre-registered)
               paying at the door
Checks are payable to: NYSSCPA - Nassau Chapter
Chairpersons:
   Alex Resnick, CPA
   Eliot Lebenshart, 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

February 20, 2019

On Parade Diner
7980 Jericho Turnpike, Woodbury, NY 11797

Please pre-register by calling Shannon at (516) 364-8888 ext. 900, e-mail her at svolkerts@wmrcpa.com or fax this page to (516) 364-3717.

Please mail your check to:
   Alex Resnick
   Wild, Maney & Resnick, LLP
   185 Froehlich Farm Blvd.
   Woodbury, NY  11797

☐ I am enclosing a check for $_______, payable to NYSSCPA – Nassau Chapter
☐ I will be using my credit memo, which I will bring with me to the meeting.

Name (print): ____________________________________________
Firm: __________________________________________________
Address: ________________________________________________
Telephone: _____________________________________________
Facsimile: ______________________________________________
Cell: ___________________________________________________
Email: __________________________________________________
CPA Cert #: ____________________________________________

Signature: ______________________________________________
Date: ___________________________________________________
Professional associations serve an important function of performing for its individual members’ projects that cannot be done as effectively, if at all, individually.

Nassau Chapter members have the opportunity to advance their knowledge and meet other professionals with similar interests. Our chapter is made up of many technical committees to assist our members in staying current on a wide variety of topics.

Use the coupon to join a committee today!

**Committee Service Application**

- Accounting & Auditing
- Attorney & Accountants
- CFO & Financial Executives
- Community Affairs & Public Relations
- Cooperation with Educational Institutions
- Employee Benefits
- Estate & Personal Financial Planning
- Financial Literacy
- Litigation & Forensic Service
- Management of Accounting Practice
- Membership
- Networking with Accountants
- Newsletter
- NextGen
- Practice Continuity
- Real Estate
- Other

☐ Small Practice MAP
☐ Sponsorship
☐ Taxation
☐ Women’s Focus Group

Name: ________________________________
Firm Affiliation: ________________________________
Address: ________________________________
City/State/Zip: ________________________________
Phone: ________________________________
Email: ________________________________

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

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

email: vivianlevy1@gmail.com

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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
INFORMATION AND HOTLINES

Have a Tax Problem?
The following members of the Taxation Committee are available to help answer your questions:

General:
Robert S. Barnett, CPA, Esq. (516) 931-8100
Jack Angel, CPA (516) 656-0800
Robert Lusthaus, CPA, Esq. (516) 937-1366
Robert J. Schaffer, CPA (516) 937-9500

Taxing Authorities
Ruth Sattig Betz, CPA (NYS) (516) 249-1919
Karen J. Tenenbaum, Esq.
LLM (Tax), CPA (IRS & NYS) (631) 465-5000
Noelle T. Geiger, Esq. (IRS & NYS) (516) 336-2447
Yvonne Cort, Esq. (IRS & NYS) (516) 931-8100
Brian Gordon, CPA (NYS) (516) 510-6041

Emergency Assistance Hotline
The committee member to call in the event of the disability or death of a member is:
John Kearney, CPA (516) 746-5980

Accounting and Auditing Technical Questions Hotline Volunteers
Thomas O. Linder, CPA (631) 462-1213
Fred R. Goldstein, CPA (516) 249-2882

Estate and Personal Financial Planning Committee Technical Questions Hotline Volunteers
Eric Kramer, CPA, Esq. (516) 227-0738
Richard Zerah, CPA/PFS, CFP, CMFC (516) 735-4717
Scott Sanders, CPA, PFS, CGMA, CFP, CFS (516) 364-3390

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

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420 Jericho Turnpike, Suite 321, Jericho, NY 11753| Phone: (516) 656-0800
lynne@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

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<td>August 1</td>
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The newsletter is downloadable at:
http://www.nysscpa.org/page/nassau-chapters-newsletters

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: _______________________

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NYS Society of Certified Public Accountants