A Message From The President

Each May, our Chapter winds down its fiscal year and prepares for the upcoming year. As such, I want to invite you all to join me at the installation of Lynne Fuentes as the 63rd President of the NYSSCPA – Nassau Chapter on Wednesday, May 25 at Crest Hollow Country Club. I am very proud to have Lynne following my presidency and thankful for all of the assistance that she has provided me with during the past year. In addition to Lynne, we will also welcome Anthony Basile as President Elect, Alex Resnick as Treasurer and Natalie Verbanac as Secretary, along with the newest board members, Nannette Watts, Kenneth Rick, Kenneth Hauptman and Wei Wu.

I would like to extend a special thanks to each of the Board Members who will be stepping down this year, including Robert Barnett, Christine Hallahan, Kristina Albarella, Mark Goldschmitt, Michael Katz, Jill Scher and Cynthia Sze. They each contributed so much to the board and we know they will continue to be involved and active. While Mark Goldschmitt will be stepping down from the board, he will remain very active as our new NextGen liaison. We are very fortunate to have Mark in this new position where he will be helping to coordinate events and be involved with the younger generation of our Chapter’s membership.

I would be remiss if I did not also thank each of the past presidents with whom I have worked over the past few years, including Robert Barnett, Scott Sanders, Lisa Haynie, Ronald Finkelstein and Mark Meinberg. This leadership group helped to put together the well-oiled machine that maintains the highest standards and continues to make the Nassau Chapter the very best in the state.

I would also like to thank the President’s Advisory Committee, Eric Kramer and Mark Meinberg, for giving me their suggestions and guidance over the past year. This was truly instrumental in the success of my role and the chapter’s advancement.

One of the primary cornerstones in my having been able to accomplish so much is our administrator, Ms. Vivian Levy. While not a NYSSCPA member, Vivian is the backbone of our organization. She works with all of our leadership and provides the back office support needed to get everything done on time. Vivian, we all thank you for the late nights, weekends and all the other things that you do, going above and beyond your job description. I must also mention another NYSSCPA employee, Ms. Lelia Dickenson, Manager of Chapter Relations. Lelia’s title says a lot, but it should really be, “The Go-to Person.” Lelia, thank you for helping us, and all of the other chapters, year after year; your dedication is amazing.

I’ll take this final opportunity to thank all the Officers, Board Members and Committee Chairs for their countless hours of dedicated service to our Chapter and the NYSSCPA. I have been privileged to work with so many individuals who have tirelessly devoted their energies to our Chapter. Their hard work enables us to host informative continuing education seminars, top-notch networking opportunities and terrific social events. I attribute the success of our Chapter to these many individuals who just keep on giving.

Since June 1, 2015, our Chapter added 124 new members. As an accountant, I like numbers and this is a really great one in terms of new membership. As a sign of appreciation for their membership, NYSSCPA invites all of our newest members to a cocktail reception on Wednesday, May 25 at Crest Hollow Country Club, immediately preceding our Installation Dinner event. Many of the board members will attend this welcoming cocktail hour, and I look forward to personally saying “hello” each of you. New members, please also remember to get involved and be active with our Chapter’s events and activities.

Now that busy season is behind us, the Nassau Chapter is in full swing again with many events and activities. Please make sure you review the newsletter and Chapter Website to see what is going on. Most of the committees will have their organization meeting in the upcoming months, so be sure to see what is going on and find out how you can get involved, the planning stages are always the best time of the year to do so.

The Nassau Chapter will hold its Annual Golf Outing at North Hills Country Club in Manhasset on Thursday, June 9. This is a first-class venue where you can expect an exceptional golf and dining experience. Please consider attending, playing, eating and networking with your peers. You will be sure to have a great time.

The 15th Annual Ellen Gordon CPA’s 4(a) Cause 5k Run/Walk will be held at Eisenhower Park on Monday, June 18. All funds raised at this event will support Island Harvest. There are no restrictions as to who can run or walk (I’ll be walking), so bring the family out for a very nice morning and help support Island Harvest in its efforts to help those in need on Long Island.

I became involved with the NYYSCPAs – Nassau Chapter roughly 26 years ago, not by just paying dues, but as an active participant in one of our committees. My mentor, Martin Randisi, advised me to get involved and pushed me to be active in the Chapter. This is how I advanced my career and area of expertise. It was through this active participation in the Nassau Chapter that I honed my specialization skills and solidified my career as a forensic accountant. I have my involvement in the NYSSCPA to thank for a long and successful career. Thank you NYSSCPA for all of the opportunities that you have provided to me during the past 26 years.

I look forward to the next chapter of my life and know that the NYSSCPA will be an important part of it. Thanks again to everyone for all that you have done and, more importantly, for all that I know you will continue to do. Please get active in the Nassau Chapter and help us to stay the best that there is, was and ever will be.

Best regards,

Philip H. Kanyuk, CPA
NYSSCPA — Nassau Chapter President, 2015-2016
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<tr>
<td>MAY</td>
<td>63rd ANNUAL INSTALLATION DINNER</td>
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<td>Crest Hollow Country Club 6:30 to 11:30 PM</td>
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<td>Taxation Committee Thursday, 5/5</td>
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<td>Fiduciary Responsibilities Mio Posto, Hicksville</td>
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<td>Small Firm MAP Committee Wednesday, 5/18</td>
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<td>10 Ways to Lose a Client On Parade Diner, Woodbury</td>
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<td>Employee Benefits Committee Joint Nassau/Suffolk Event Wednesday, 5/18 Audits of 401(k) Plans Melville Marriott 8 AM to 4 PM</td>
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<td>CFO Committee Thursday, 5/19</td>
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<td>Internal Control/Fraud/Cyber Security Techniques Deloitte, Jericho 8 to 10 AM</td>
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<td>JUNE</td>
<td>Chapter Organizational Meeting Tuesday, 6/7</td>
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<td>Milleridge Inn, Jericho 8 AM</td>
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<td>Employee Benefits Committee Wednesday, 6/8</td>
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<td>The Immediate Impact of New DOL Fiduciary Rules Mio Posto, Hicksville 8 AM</td>
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<td>NYSSCPA Annual Golf Outing Thursday, 6/9</td>
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<td>North Hills Country Club, Manhasset</td>
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<td>Cloud Computing Options/Planning for 2016 - 2017 Deloitte, Jericho 8 to 10 AM</td>
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<td>Small Firm MAP Committee Wednesday, 6/15</td>
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<td>Labor Law Update On Parade Diner, Woodbury 8 to 10 AM</td>
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<td>15th Annual Ellen Gordon CPAs 4(a): Cause 5K Run/ Walk to End Hunger Saturday, 6/18 Eisenhower Park, East Meadow Registration 8 AM Race Starts 9 AM</td>
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<td>Financial Literacy Committee Thursday, 6/30</td>
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<td>Breakfast Meeting Sanders, Thaler, Viola &amp; Katz LLP, Jericho 8 to 10 AM</td>
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<td>Practice Continuity Committee Friday, 7/22</td>
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<td>Organizational Meeting &amp; Roundtable Discussion On Parade Diner, Woodbury 8 AM</td>
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Chapter Officials:

- **PRESIDENT**
  - Philip H. Kanyuk, CPA

- **PRESIDENT ELECT**
  - Lynne M. Fuentes, CPA

- **VICE PRESIDENT**
  - Christine P. Hallahan, CPA

- **SECRETARY**
  - Alex Resnick, CPA

- **TREASURER**
  - Anthony Basile, CPA

- **DIRECTOR (PAST PRESIDENT)**

- **DIRECTORS**
  - Kristina Albarella, CPA
  - Mark R. Cuccia, CPA
  - Mark Goldschmitt, CPA
  - Michael D. Katz, CPA
  - Vivian Martinez, CPA
  - Jill Scher, CPA
  - Joshua S. Sechter, CPA
  - Cynthia Sze, CPA

- **ACCOUNTING & AUDITING**
  - Mark R. Cuccia, CPA
  - Mark Goldschmitt, CPA
  - Marcy Greenfield, CPA

- **ATTORNEY & ACCOUNTANTS**
  - Kristina Albarella, CPA
  - Anthony Basile, CPA
  - Jill Scher, CPA

- **CFO & FINANCIAL EXECUTIVES**
  - Anthony Aronica, CPA
  - Manlio Cafiero, CPA

- **COMMUNITY AFFAIRS & PUBLIC RELATIONS**
  - Kenneth Rick, CPA

- **COOPERATION WITH BANKERS & CREDIT GRANTORS**
  - Neal Korenberg, CPA

- **COOPERATION WITH EDUCATIONAL INSTITUTIONS**
  - Anthony Basile, CPA
  - Michael D. Katz, CPA
  - Abby Lucrezia

- **EMPLOYEE BENEFITS COMMITTEE**
  - Michael J. Corkery, CPA
  - Tina M. Isbitsky, CPA

- **ESTATE & PERSONAL FINANCIAL PLANNING**
  - Christine P. Hallahan, CPA
  - Eric M. Kramer, CPA, Esq.
  - Scott Sanders, CPA
  - Stuart R. Shapiro, CPA

- **FINANCIAL LITERACY**
  - Jarred Berman, CPA
  - Nannette Watts, CPA

- **LITIGATION & FORENSIC SERVICES**
  - Pasquale Rafanelli, CPA
  - Nannette Watts, CPA

- **MANAGEMENT OF ACCOUNTING PRACTICES**
  - Grassi & Co., CPAs

- **MEDICAL & OTHER PROFESSIONALS**
  - Neal Guber, CPA

- **MEMBERSHIP**
  - John V. Pellitteri, CPA

- **NEWSLETTER**
  - Lynne M. Fuentes, CPA

- **PRESIDENT'S ADVISORY COMMITTEE**
  - Eric M. Kramer, CPA, Esq.
  - Mark L. Meinberg, CPA

- **PRACTICE CONTINUITY**
  - Larry Bloom, CPA
  - Eliot Lebenthal, CPA
  - Craig R. Morris, CPA

- **REAL ESTATE COMMITTEE**
  - Joel Dressner, CPA
  - Vivian Martinez, CPA

- **SMALL PRACTICE UNIT MAP**
  - Kenneth Hauptman, CPA
  - Eliot Lebenthal, CPA
  - Alex Resnick, CPA
  - Scott Sanders, CPA

- **SPONSORSHIP COMMITTEE**
  - Joshua S. Sechter, CPA
  - Philip H. Kanyuk, CPA

- **TAXATION COMMITTEE**
  - Robert S. Barnett, CPA
  - Iola Damante, CPA
  - Robert J. Schaffer, CPA

- **TECHNOLOGY COMMITTEE**
  - Mark Plostock, CPA

- **WOMEN'S FOCUS GROUP**
  - Geri Gregor, CPA
  - Christine P. Hallahan, CPA
  - Elizabeth Oberg, CPA

- **YOUNG CPAs**
  - Carmelina Hernandez, CPA
  - Joshua S. Sechter, CPA
  - Wei Xu, CPA

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www.nysscpa.org
Spotlight on Chapter Award Recipients

The NYSSCPA – Nassau Chapter will once again honor two of its dedicated members at the organization's installation dinner. Board Member Scott Sanders, CPA, PFS, CGMA, CFP, CFS, is receiving the Distinguished Service Award and former Board Member Abby Lucrezia is being honored with the Samuel B. Traum Achievement Award. Each member took time from their busy schedules to provide the chapter with some background information ahead of the ceremony on May 26, 2016.

Scott Sanders

Sanders Thaler Viola & Katz, LLP, Managing Partner Scott Sanders has more than 35 years’ experience in personal, trust and estates tax services and his firm specializes in providing tax, accounting and financial services for entrepreneurial and high-net worth individuals. Through his dedication to the industry, which started in high school when his teacher taught him about the profession and brought in copies of the Wall Street Journal and New York Times, Scott learned that “diligence and hard work pays off in the end,” he says.

Scott joined NYSSCPA more than 20 years ago as a means of getting to know his peers and later became more active when he became a Committee Chair. Scott is the founder of both the Sponsorship and Financial Literacy Committees and has been a Board Member for roughly 10 years. He credits his membership for having provided him with “tremendous knowledge from other members of CPA firms and partners of law firms” and explains that “it also allowed me to demonstrate that our firm would be a good fit for assisting clients in the local area along with many CPAs and attorneys in niche areas.”

Today, Scott serves as Chair of the Small Firm MAP Committee, Co-Chair of the Estate & Personal Financial Planning Committee and member of the President’s Advisory Board Committee. Through these committees, Scott helps provide other members with the additional knowledge, resources and advice on practice management issues which are necessary to perform their job in an efficient and successful manner. This includes the recent Small MAP meeting, which focused on technology and millennials and the means by which today’s accountants will need to adapt to the modern young adult, which are potential future clients.

Millennials aren’t just vital to the success of a firm from a client perspective, but also as future employees. “If you have the passion in your gut to work hard, you will definitely enjoy the rewards of this field,” Scott says. “Accounting provides you with the ability to meet terrific people while helping clients meet their financial goals. You should always do what's possible – such as joining NYSSCPA – to network with other professionals who will help broaden your spectrum of knowledge.”

In addition to his professional contributions to the organization, Scott is also involved with many of its philanthropic efforts, including the Ellen Gordon CPAs 4(a): Cause 5K Run/Walk and the Financial Literacy Committee’s various fundraisers in support of local libraries and the Island Harvest, Boy Scouts and Girl Scouts organizations.

For Scott, this award further validates his commitment to the organization. “I am extremely honored to receive this award from my peers,” he says. “I hope that my hard work and dedication for these past 20 years will inspire my children, so that one day they can say ‘That was my dad who did all of that.’ It is my wish that I will be remembered for making a difference both for the NYSSCPA – Nassau Chapter as well as to my colleagues and peers.”

(Continued on page 4)
Abby Lucrezia

Abby Lucrezia, Director of Human Resources for Janover, LLC, has worked in the accounting industry for more than 30 years. After starting her career in the Management Information Systems group for one of the “Big Eight” accounting firms, she switched over to Human Resources. Though she’s not a CPA, Abby has learned a lot about the profession over the years – the most important lesson being that “accounting is not all about numbers, but rather it is more about the people and relationships. I have made lifelong friends who have always supported me,” she says.

One of only a handful of non-CPAs on the Board of NYSSCPA – Nassau Chapter, Abby says that her membership has “enabled me to have a fulfilling and continuous career in the accounting profession.” As part of her involvement with the chapter, Abby serves as Co-Chair of the Cooperation with Educational Institutions Committee. In this role, she helps coordinate the committees mentoring event, held each fall, during which accounting students from local colleges are invited to network with practicing accountants from local CPA firms.

“We stress the importance of teaching the students how to network and introduce them to opportunities in the accounting field,” she explains. “It is a rewarding experience to watch this event, which we work so hard to organize, come together successfully. It is a great feeling to hear from students after the fact who have found an accounting position.”

In addition to her position as Co-Chair, Abby is also one of the Chapter’s instructors for the NYSSCPA COAP program, which introduces students from underprivileged high schools to the accounting profession. “Earning a degree in accounting opens a lot of doors,” she says. “You don’t necessarily have to spend your entire career working for a public firm, but it is a lucrative field and has so much potential.” Abby’s class focuses specifically on interviewing techniques, which is perfectly suited to her HR knowledge.

All of her dedication to the organization has earned Abby a spot among the chapter’s elite members, which has humbled the dedicated member. “When Phil called to tell me that I won this award, I was completely shocked,” she explains. “Unfortunately, I didn’t have the privilege of knowing Sam Traum, but I have heard about his service and dedication to the Chapter. I hope, in my own way, I am following in his footsteps and contributing to the profession in the same way as he. In fact, my exact comment to Phil was ‘I just do what comes naturally.’”
The goal of this article is to convince you that we have a serious financial literacy problem in the U.S. and that CPAs are in a position to do something about it. Additionally, I hope that you will see that every CPA could benefit his/her practice and/or reputation by promoting financial literacy.

Financial Literacy Improvement

Reaching financial literacy can be a small or monumental task, depending on your starting point. Teaching financial literacy could be a full time endeavor and I’m sure most CPAs don’t have the spare time to do this. But how about doing a one-hour presentation? Could you find the time to do a one-hour financial literacy presentation once a quarter or once a month? I think most of us could.

Providing a one-hour presentation on financial literacy could inspire people who are on their way to a lifetime of confusion on financial matters to make the effort to learn more and become financially literate. As we all know, a one-hour presentation wouldn’t be enough to achieve financially literacy but it could be the key to turning the corner and sparking the inspiration to continue learning. There are many websites with excellent information regarding financial literacy (I have listed three at the end of this article). You might even find yourself becoming inspired and want to provide additional sessions on specific topics to further the advancement of financial literacy.

CPAs are knowledgeable in financial matters and also are generally granted a level of respect by the public in financial matters. Who would be better to provide the inspiration? Perhaps teachers would be better suited, but would many teachers have the required knowledge? Would they have the time to concentrate on financial literacy? I’m happy to say that New York State is among the few states that do offer economics and personal finance education instruction in their curriculums and that will certainly help over time. But for those who have missed those lessons or never realized the importance of those lessons, there is still a real need.
Financial Literacy –
Do a Good Deed and Benefit Your Practice/Reputation
(Continued from page 5)

How could you provide a financial literacy presentation? As I see it, there are three requirements. First, your desire to do it. Second, the development of a presentation. Third, finding a forum to give your presentation. The most difficult one is your desire to do it. Once that is in place, the rest is easy. Developing a presentation is not hard and I (or other members of the Financial Literacy Committee of the Nassau Chapter) would be willing to help you with it. The key here is becoming comfortable with the presentation – making it your own and not some canned program that will be of little interest to your attendees. Targeting your presentation to a specific age group might make sense. I have done several presentations geared towards young adults but there is clearly a need across all ages. Finding a forum is also not difficult – local public libraries and schools would likely be happy to have you provide a presentation. If you meet the first requirement, feel free to contact me (or other members of the Financial Literacy Committee) for help on the next two.

Promoting your presentation to your local community is a key challenge and the truth is you may not draw a crowd. However, reaching just one person could have a significant impact upon him or her. After you have done the presentation once, it will be much easier doing it again and again and you are likely to attract more people.

Benefit to You

Giving something back to your community is a worthwhile achievement and will give you a sense of accomplishment. Additionally, CPAs, like any other business, need promotion. Getting your name out as a financially knowledgeable person who cares enough about his/her community to promote financial literacy is a very positive thing. Perhaps it would help your tax, accounting or audit practice or maybe it will just improve your reputation. Either way you, and the people you inspire, win.

Financial Literacy Websites

AICPA’s 360 Degrees of Financial Literacy
www.360financialliteracy.org

Jump$tart Coalition for Personal Financial Literacy
www.jumpstartcoalition.org

Financial Literacy 101
www.financialliteracy101.org

Thomas K. Lynch, CPA Sole Practitioner

Tom has been a CPA for over 30 years in public and private accounting. He is currently a CPA sole practitioner working primarily in the investment management area and is a member of the Financial Literacy Committee of the Nassau Chapter of the NYSSCPAs.

(TomLynchCPA78@gmail.com)
IN THE NEWS

NYSSCPA – NASSAU CHAPTER
Report of the 2016-2017 Nominating Committee
March 11, 2016

NOMINATING COMMITTEE:
Chair: Scott Sanders, CPA
Robert Barnett, CPA, Esq.
Eric Kramer, CPA

The Nominating Committee is proud to announce the Slate for the 2016-2017 Year:

OFFICERS:
PRESIDENT: Lynne M. Fuentes, CPA
PRESIDENT-ELECT: Anthony Basile, CPA
TREASURER: Alex Resnick, CPA
SECRETARY: Natalie Verbanac, CPA

DIRECTORS:
Nannette Watts, CPA Two-Year Term ending May 31, 2018
Kenneth Rick, CPA Two-Year Term ending May 31, 2018
Kenneth Hauptman, CPA Two-Year Term ending May 31, 2018
Wei Xu, CPA Two-Year Term ending May 31, 2018
Mark Cuccia, CPA One-Year Term ending May 31, 2017
Vivian Martinez, CPA One-Year Term ending May 31, 2017
Joshua Sector, CPA One-Year Term ending May 31, 2017
Pasquale Rafanelli, CPA One-Year Term ending May 31, 2017

THE FOLLOWING ARE AUTOMATICALLY SELECTED:
DIRECTOR (IMMEDIATE PAST PRESIDENT): Philip H. Kanyuk
PRESIDENT: Lynne M. Fuentes
Looking for a few good volunteers...

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

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

**Employee Benefits**

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

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

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

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

- Mike Corkery CPA, CFE
  631-845-5252
  michael.corkery@NYBKW.com

**Sponsorship**

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

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

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

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

- Philip Kanyuk, CPA/CFF/ABV, ASA
  631-845-5252
  phil.kanyuk@nybkw.com
UPCOMING MEETINGS AND EVENTS

63rd Annual
Installation Dinner

A Night in Havana

Wednesday, May 25
6:30 p.m.
Crest Hollow Country Club
Woodbury, NY

RESERVE YOUR SEAT TODAY!
Seats $100 per Person
Table of 10 $950
Sponsorships Available
Download our sponsorship packet HERE
UPCOMING MEETINGS AND EVENTS

NYSSCPA — Nassau Chapter
INSTALLATION DINNER

Wednesday, May 25, 2016 | 6:30 p.m.
Crest Hollow Country Club, Woodbury

“A Night in Havana”

Sponsorships & Advertising:

☐ GOLD SPONSORSHIP: $2,000
Recognition on the podium
Full-page ad in event program
Eight (8) tickets to the event*
Signage at the event

☐ SILVER SPONSORSHIP: $1,400
Recognition on the podium
Half-page ad in event program
Six (6) tickets to the event*
Signage at the event

☐ BRONZE SPONSORSHIP: $900
Recognition on the podium
Quarter-page ad in event program
Four (4) tickets to the event*
Signage at the event

☐ GIFT SPONSORSHIP: $400
Podium recognition during the prize drawing
Eighth-page ad in event program
One (1) ticket to the event
Signage at the event

☐ PROGRAM ADVERTISING
__ Full-page: $1,200 (7.25” x 9.75”)
__ Half-page: $700 (7.25” x 4.75”)
__ Quarter-page: $400 (3.5” x 4.75”)
Submit original business card.

SPONSORSHIPS & ADVERTISING: to vivianlevy1@gmail.com no later than Friday May 6, 2016.
All sponsorship levels include recognition in our September newsletter. Include names of all guests below.

Tickets & Tables:

☐ TABLE OF 10: $950
Number of tables ______

☐ INDIVIDUAL TICKETS: $100 per person
Number of tickets ______

TICKET/TABLE RESERVATIONS: To lynne@fuentesangelcpas.com no later than Tuesday, May 17, 2016.
Include names of all guests below.

Name:___________________________________________
Firm:___________________________________________
Address:________________________________________
City, State, Zip:_________________________________
Telephone:_____________________________________
E-mail:_________________________________________

Names of Attendees:

Person who Solicited You: _____________________________

BY CHECK payable to NYSSCPA Nassau Chapter
By CREDIT CARD via PayPal: CLICK HERE

Lynne Fuentes
Fuentes & Angel CPAs LLC
307 Hicksville Rd, #10
Bethpage, NY 11714

**After payment, send this form to Lynne Fuentes
Via Email to: lynne@fuentesangelcpas.com
Via E-fax to: 516-784-5263

Chartered 1953
NASSAU CHAPTER
www.nysscpa.org

VOLUME 60 ISSUE 8 10
The CFO & Financial Executives Committee welcomes CPAs in industry to participate in our monthly meetings. Our CFO committee organizes monthly, interactive learning experiences guided by professionals of multiple disciplines and provides a confidential forum for industry CPAs at a senior level to seek advice, exchange guidance with fellow professionals and develop a resourceful peer group. Our monthly education topics are planned in advance by a group of active committee members. Prior to each seminar, the committee allocates time for a “roundtable” discussion.

Prospective members should be a CFO or the most senior financial person at their company. The dates and topics for our upcoming committee meetings are detailed below. We look forward to seeing you at a meeting soon.

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<tr>
<td>05/19/16</td>
<td>Internal Control/Fraud/Cyber Security Techniques</td>
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<tr>
<td>06/09/16</td>
<td>Cloud Computing Options/Planning for 2016-2017</td>
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**PAST SEMINARS THIS YEAR...**

- September: GAAP Update
- October: Tax Update
- November: Healthcare/ACA Update & IRS Reporting Requirements
- December: Fiduciary & Trustee Responsibilities of 401(k) Plans
- January: The Financial, Legal and Practical Process of Selling a Company
- February: Estate Planning for the Closely Held Business & Real Estate Owner
- March: Banking Market Update
- April: Buy-Sell Agreements

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

**MEETING LOCATIONS:**
Deloitte  
2 Jericho Plaza, Jericho

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

Please RSVP:

Email this form to:  
aaronica@graphicpaper.com

Or fax this form to:  
631-439-8822

**CFO COMMITTEE MEETING RSVP**

Meeting Date:  
Name:  
Firm:  
Address:  
Telephone:  
Email:  
UPCOMING MEETINGS AND EVENTS

NYSSCPA — NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE MEETING

MAY 18, 2016

TOPIC: 10 WAYS TO LOSE A CLIENT

• Poor service
• Failure to understand the client and their profitability/business
• Inattentiveness
• Fees (pricing)
• Mistakes made on tax returns/financials
• Clients go out of business
• Failure to deliver product in a timely manner
• Taking on a project you cannot handle and getting poor results
• Failure to respond to inquiries in a timely manner
• Not communicating with client on a regular basis - “stay in front”
• AND MORE!

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

CPE: 2 Credits Pending

Time: 8 to 10 a.m. (be prompt!)

Place: On Parade Diner
7980 Jericho Turnpike, Woodbury

Cost:* $25 per person paid in advance
$30 per person (includes pre-registered)
paying at the door – No Exceptions

Checks are payable to:
NYSSCPA — Nassau Chapter

Chairpersons:
Scott Sanders, CPA, PFS, CGMA, CFP®, CFS
Eliot Lebenhart, CPA
Kenneth Hauptman, CPA
Alex Resnick, CPA

WE LOOK FORWARD TO SEEING YOU THERE!

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

Please note: Meetings are subject to change.
Notifications will be sent to all registered attendees via email should this occur.
FINANCIAL LITERACY COMMITTEE
UPCOMING MEETINGS

DATES:
6/30, 7/21, 8/18, 9/22, 10/20
ALL MEETINGS ARE ON THURSDAYS.

BREAKFAST MEETING:
8 TO 10 A.M.

SANDERS THALER VIOLA & KATZ
350 JERICHO TURNPIKE, SUITE 1
JERICHO, NY 11753

Please RSVP to
Liz Oberg:
loberg@st-cpas.com
NYSSCPA — Nassau Chapter Employee Benefits Committee is presenting a Complimentary Fiduciary Fitness Breakfast (Includes 1.0 CEU)

The Immediate Impact of New DOL Fiduciary Rules

Presented By
Neal Weaver, Registered Fiduciary, CFP®, ChFC®

&
Hosted By:
Kuttin Wealth Management
A private wealth advisory practice of Ameriprise Financial Services, Inc.

Date: Wednesday, June 8, 2016
Time: 8:30 a.m. to 10 a.m.
Location: Carlyle at the Palace
1600 Round Swamp Road, Plainview, NY 11803

Attendees will learn to:
- Differentiate between the various types of third-party fiduciaries
- Implement strategies to make fees both competitive & transparent
- Assess the quantity of participants who are on target to retire
- Apply behavioral finance solutions to improve retirement readiness
- Identify the most common problems with investment menus
- Establish sound fiduciary governance

RSVP: Liz Cappa-Saitta by June 3, 2016
631-770-0335 ext. 131 or elizabeth.saitta@ampf.com
UPCOMING MEETINGS AND EVENTS

NYSSCPA’S NASSAU CHAPTER ANNUAL GOLF OUTING

Don’t Miss the Golf & Networking Event of the Season!

Thursday, June 9, 2016
RAIN OR SHINE
North Hills Country Club
Manhasset, New York
10:30am Registration
12pm Shotgun
5:30pm Cocktail/Buffet Dinner including Raffle Prize Drawing

Sponsorships Available!
Ideal way to have your firm’s or institution’s presence enhanced!

VIP Sponsor $1,000
1. Name prominently displayed on signs at all portions of the day (brunch, golf & dinner).
2. Two representatives for dinner.
3. Table to showcase at brunch and dinner.

Cocktail/Dinner Sponsor $500
1. Name prominently displayed on sign during cocktail/dinner.
2. One representative for dinner.

Brunch Sponsor $400
1. Name prominently displayed on sign during brunch.
2. One representative for brunch.

Tee Sponsor $125
1. Name prominently displayed on sign at tee of one hole.

Prize or Giveaway Sponsor
1. Name prominently displayed on sign during registration or drawing.

Any questions: Carol Pinto
T: 516-937-9500
F: 516-932-0485
Email: cpinto@ck-co.com

Raffle Prizes:
Donations are greatly appreciated – Your firm and/or Institution’s name will be prominently displayed during the raffle drawing of the evening.

We will also be accepting items for giveaways at registration, such as golf balls, tees, divot tools, towels, etc.

Proper Golf Attire Required!
Sport or golf shirts with collar and sleeves (must be tucked in). Golf shorts or slacks for men, golf skirts or shorts for women. NO CARGO SHORTS OR DENIM ALLOWED ON THE PREMISES.

RSVP By May 31, 2016
The RSVP registration form is on the following page.
Reservations are on a first-come, first-serve basis with receipt of payment.

Caddies:
Please remember that there will be some caddies available at the outing. If you would like to have a caddie assigned to your foursome, please let me know.

Caddie fee of $120 per foursome is NOT included in the price of golf.
REGISTRATION FORM:
Please make all checks payable to:
NYSSCPA – NASSAU CHAPTER

Mail to:
Castellano, Korenberg & Co., CPAs
313 W. Old Country Road
Hicksville, NY 11801

[ ] Foursome $1,600 (includes free tee sponsorship)
[ ] Individual golfer $425
[ ] Dinner $175 per person

*Please note – Caddy’s fee is NOT included in foursome or individual price*

Player(s) and/or Dinner Attendee(s) Name(s):

1. _________________________________________
2. _________________________________________
3. _________________________________________
4. _________________________________________

FIRM NAME FOR SPONSORSHIP:
(For use on signs)
_____________________________________

[ ] VIP Sponsor $1,000
[ ] Cocktail/Dinner Sponsor $500
[ ] Brunch Sponsor $400
[ ] Tee Sponsor $125
[ ] Prize and/or Giveaway Sponsor

Telephone: _________________________________
Contact Person: _____________________________
Email Address: _____________________________

Directions:
North Hills Country Club
200 N. Service Road (off LIE)
Manhasset, NY 11030
516-627-9100

**VIA Long Island Expressway:**

**By Auto from New York:**
LIE East to Shelter Rock Road (Exit 35), proceed to light, turn left and cross expressway. Turn left onto westbound service road. Clubhouse entrance is on the right side.

**By Auto from Eastern Long Island:**
LIE West to Searingtown Road (Exit 36). Proceed westbound on service road, pass Searingtown Road and Shelter Rock Road. Continue approximately half mile. Entrance to clubhouse is on the right side.
15th Annual
Ellen Gordon
CPAs 4(a): Cause
5K Run/Walk
to End Hunger

Saturday, June 18, 2016
Eisenhower Park, Field 1 & 2
East Meadow, NY
(Access from Merrick Ave. entrance only)
Registration Starts at 8 a.m.
Race Time: 9 a.m.

Proceeds will benefit:
Island Harvest
www.islandharvest.org
UPCOMING MEETINGS AND EVENTS

15th Annual Ellen Gordon CPAs 4(a): Cause 5K Run/Walk to End Hunger
Saturday, June 18, 2016
Eisenhower Park, Field 1 & 2
East Meadow, NY
(Access from Merrick Ave. entrance only)
Registration Starts at 8 a.m.
Race Time: 9 a.m.
Proceeds will benefit:
www.islandharvest.org
www.islandharvest.org
Start Fundraising Today!
www.islandharvest.org

Awards:
Top 3 Overall Male
Top 3 Overall Female
Top 3 Finishers in each age category (5 year groups)
Ribbons for all children under 14

Music
Post-race food & refreshments
Food Sponsor

Awards:
Top 3 Overall Male
Top 3 Overall Female
Top 3 Finishers in each age category (5 year groups)
Ribbons for all children under 14

Start Fundraising Today!
www.islandharvest.org

Register online: www.islandharvest.org
For more information: www.islandharvest.org

Chartered 1953
NASSAU CHAPTER
www.nysscpa.org
NYSSCPA — NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE MEETING

JUNE 15, 2016
TOPIC: LABOR LAW UPDATE

• 2016 Reclassification Initiative
• Consequences for Employee Classification
• Application of the Administrative Exemption
• Increase in Task Force Referrals
• Americans with Disabilities Act
• Minimum Wage and Statewide Family Leave Initiatives
• AND MORE!

Speakers: Ruth B. Kraft, Esq.
of Bartlett, McDonough & Monaghan, LLP

CPE: 2 Credits Pending

Time: 8 to 10 a.m. (be prompt!)

Place: On Parade Diner
7980 Jericho Turnpike, Woodbury

Cost:* $25 per person paid in advance
$30 per person (includes pre-registered)
paying at the door – No Exceptions
Checks are payable to:
NYSSCPA — Nassau Chapter

Chairpersons:
Scott Sanders, CPA, PFS, CGMA, CFP*, CFS
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WE LOOK FORWARD TO SEEING YOU THERE!

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Please note: Meetings are subject to change.
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NYSSCPA — NASSAU CHAPTER
Small Firm MAP Meeting Topics 2016*

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Speaker/Moderator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday, May 18</td>
<td>10 Ways to Lose a Client</td>
<td>Scott Sanders, CPA, PFS, CGMA, CFP®, CFS</td>
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<td>Eliot Lebenhart, CPA</td>
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<td>Kenneth Hauptman, CPA</td>
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<td>Alex Resnick, CPA</td>
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<tr>
<td>Wednesday, June 15</td>
<td>Labor Law Update</td>
<td>Ruth Kraft, Esq., Barlett, McDonough &amp; Monaghan, LLP</td>
</tr>
</tbody>
</table>

All meetings will be held at On Parade Diner
7980 Jericho Turnpike, Woodbury, NY 11797
Time: 8 to 10 a.m. (breakfast included)

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

You Can Contact Your Co-Chairmen as Follows:
Scott Sanders, CPA, PFS, CGMA, CFP®, CFS
516 938-5219

Eliot Lebenhart, CPA
516 938-5219

Kenneth Hauptman, CPA
516 364-8888

Alex Resnick, CPA
516 364-8888

*Please note: Meeting dates, topics and speakers are subject to change.

All meetings are held on Fridays unless otherwise noted.
A TECHNICAL MEETING SPONSORED BY
THE TAXATION COMMITTEE AND THE ESTATE &
PERSONAL FINANCIAL PLANNING COMMITTEE

TAX SAVING OPPORTUNITIES
FOR TRUSTS AND ESTATES

Capell Barnett Matalon & Schoenfeld, LLP

Join us for an evening that includes:
• Networking
• Technical Presentation
• Dinner & Drinks (beer/wine)

SPONSORED IN PART BY:
DOMINICK CITERA, EQUITY SERVICES, INC.
AFFILIATED WITH NATIONAL LIFE INSURANCE COMPANY
RSVP TO IOLA DAMANTE AT ldamante@rem-co.com
Raich, Ende Malter, 175 Broadhollow Road, Melville, NY 11747

Monday, June 6, 2016 at 5:30 p.m.
Chris and Tony’s, 352 Jericho Turnpike, Syosset, NY 11791
5:30 to 6:30 p.m. – Networking and drinks (beer & wine)
6:30 to 8:10 p.m. – Presentation and dinner

Course Code: 29036702
CPE Credits: 2
Cost: $25
Make checks payable to:
NYSSCPA - Nassau Chapter

Committee Chairpersons: Robert Barnett, Robert Schaffer, Iola Damante, Christine P. Hallahan,
Eric Kramer, Scott Sanders & Stuart Shapiro
UPCOMING MEETINGS AND EVENTS

NYSSCPA — NASSAU CHAPTER
PRACTICE CONTINUITY COMMITTEE

ORGANIZATIONAL MEETING AND ROUNDTABLE DISCUSSION
CONTINUITY AND SUCCESSION PLANNING ISSUES

FRIDAY, JULY 22, 2016, 8AM
ON PARADE DINER
7980 JERICHO TURNPIKE
WOODBURY, NEW YORK, 11797
PHONE (516) 364-1870

Name: _______________________________________________ Firm: __________________________________________________
Address: _________________________________________________________________________________________________________
City, State, Zip: __________________________________________________________________________________________________
Telephone: __________________________________________          Email: ________________________________________________

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

Dear Ginette:
____ I will be attending the breakfast meeting at 8 a.m.
____ Enclosed is my check for $ ____ at $25 per person (must be received by noon, Thursday, April 28)
____ I prefer to pay $ ____ at $30 per person at the door. (Walk-ins may be limited due to space availability).
Checks are payable to NYSSCPA — Nassau Chapter.

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

Name: _______________________________ Firm: _______________________________
Address: _________________________________________________________________________________________________________
City, State, Zip: __________________________________________________________________________________________________
Telephone: ___________________________ Email: ______________________________
First, I'd like to thank Mark Perlson and his team for a tremendous job at our April meeting. Mark led a panel of speakers from his firm on staff development, focusing on making team members partners and solving succession issues with home grown talent. They addressed culture, inclusion, delegation, mentoring, compensation, rewards, hiring, encouragement and other actionable ideas to build a homegrown succession plan. His ideas were insightful and he demonstrated, through his own growth from zero to 30 team members, how to make his plan work. The team he built was impressive and the audience expressed much appreciation for the information provided. Thank you, Team Perlson!

Now that busy season has ended, it’s time to reflect on the past and plan for the future. An important part of your future should include succession planning and an exit strategy, whether it’s near term or long-term. The Nassau Chapter offers our Practice Continuity Committee as a resource to help with that planning, whether for retirement and succession, or a strategy in case of death or disability.

During the 2015/2016 Chapter year, we held four meetings on these topics:

- an organizational meeting with an open discussion on succession issues;
- succession and retirement planning by Ed Mendlowitz, a CPA who grew his small firm to an extremely successful firm, ultimately merging into a major, multi-office firm for succession;
- the succession planning environment, with alternatives including mergers, acquisitions, talent acquisition, training and other options by Bill Carlino and Phil Whitman;
- solving succession issues with homegrown talent, by Mark Perlson and his team.

Our Committee is an educational and networking resource, with goals and activities that include:

- the development of a community of CPAs to exchange ideas;
- a place for educational resources on practice continuity issues;
- meetings to address topics specific to practice continuity concerns;
- networking events where members can meet and discuss issues;
- expansion of our Web forum to provide valuable resources and exchange ideas with others who have similar concerns.

Team Perlson LLP, young and old, present to the Practice Continuity Committee on April 29, 2016

(Continued on page 18)
Our web resource on Yahoo Groups can be found at http://finance.groups.yahoo.com/group/CPA_Practice_Continuity_and_Succession/.

There are many valuable succession planning resources on this Website, including:

- our committee charter,
- magazine articles directly related to continuity and succession planning,
- links to other important Web sites,
- a sample Practice Continuation and Emergency Assistance Agreement,
- the AICPA PCPS Succession Research Report,
- books for reference, with table of contents for viewing,
- past meeting presentation outlines.

As a Committee member, you can also upload content that you think is valuable to the group, send emails, view member profiles and access other services. So, join us today to avail yourself of these and future resources.

Our 2016/2017 Organizational Meeting will be held on Friday, July 22, 2016 (date subject to change). It will include a roundtable discussion along with an opportunity to discuss your succession planning concerns. If you attend, you’ll be able to influence future meetings and the direction for our committee. Complete the coupon in this newsletter to attend our July meeting. For more information on our meetings or our committee, contact us at ginette@morriscpas.com.

We look forward to your participation.

Craig R. Morris, Chairman

Participants enjoy breakfast and an excellent presentation
Professional associations serve an important function of performing for its individual members' projects that cannot be done as effectively, if at all, individually.

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

Use the coupon to join a committee today!

### Committee Service Application

- [ ] Accounting & Auditing
- [ ] Attorney & Accountants
- [ ] CFO & Financial Executives
- [ ] Community Affairs & Public Relations
- [ ] Cooperation with Bankers & Credit Grantors
- [ ] Cooperation with Educational Institutions
- [ ] Employee Benefits
- [ ] Estate & Personal Financial Planning
- [ ] Financial Literacy
- [ ] Litigation & Forensic Service
- [ ] Management of Accounting Practice
- [ ] Medical & Other Professionals
- [ ] Membership
- [ ] Newsletter
- [ ] Practice Continuity
- [ ] Real Estate
- [ ] Small Practice MAP
- [ ] Sponsorship
- [ ] Taxation
- [ ] Technology
- [ ] Women's Focus Group
- [ ] Young CPA
- [ ] Other

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

Please forward your response to:
Lynne Fuentes, CPA
307 Hicksville Road, Bethpage, NY 11714
lynne@fuentesangelpcas.com | Tel: 516-622-3045

If you wish to advertise in the NYSSCPA — Nassau Chapter Newsletter promoting your business or self, please contact Vivian Levy
e-mail: vivianlevy1@gmail.com

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https://www.facebook.com/NYSSCPANassau

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http://www.linkedin.com/groups?gid=5010322&most-Popular=&trk=tyah&trkInfo=tas%3Anysscpa%20nas

If you wish to sponsor any Nassau Chapter or committee event, download our sponsorship contract [here](https://www.facebook.com/NYSSCPANassau) or contact

Vivian Levy
c/o Sanders Thaler Viola & Katz, LLP
350 Jericho Turnpike, Suite 1
Jericho, NY 11753
Phone: (516) 938-5219 | Fax: (516) 938-0491
vivianlevy1@gmail.com
INFORMATION AND HOTLINES

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

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

**Taxing Authorities**
- Ruth Sattig Betz, CPA (NYS) (516) 249-1919
- Karen J. Tenenbaum, Esq. 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) 938-5219

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**Newsletter Committee**

Newsletter produced by
The Public Relations and Marketing Group
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Jericho, NY 11753
Phone: (516) 938-5219
vivianlevy1@gmail.com

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

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

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**NYSSCPA certified public accountants**
NYS Society of Certified Public Accountants

**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