A Message from the President

"I love being a CPA!"

That is how I started my speech when I was installed as the Nassau Chapter’s 63rd president last year, and I meant it. I truly love what I do and couldn’t wait to be president of the chapter. As this past year progressed, that love only grew. What a great organization we have; we are surrounded by knowledgeable, supportive members, upon whom we can call for professional or personal assistance at almost any time of the day or night. I wanted the NextGen members of our chapter to see what I saw in our profession: my goal was to get more of these NextGen members involved with the Society and the Nassau Chapter and to show them how beneficial it could be to them, their firms, and their firms’ clients.

Our NextGen Committee chair, Wei Xu, stepped up to the plate and took the reins, along with her new committee co-chair, Jean David Chery, and resurrected our NextGen Committee. Because of their hard work, this committee is flourishing. I see great things happening for these two in the upcoming years. They and their committee members are our future leaders.

This resurrection would not have come to fruition if it were not for the assistance of the chapter’s officers, directors, and president’s advisory board. This is truly a team effort. They say it takes a village; well, for the NYSSCPA, maybe it’s a chapter. I thank Phillip H. Kanyuk, Anthony Basile, Alexander Resnick, Natalie Licul-Verbanac, Mark R. Cuccia, Vivian Martinez, Kenneth Hauptman, Nannette Watts, Kenneth H. Rick, Pasquale Rafanelli, Wei Xu, James N. Kinney, Scott Sanders, and Elizabeth A. “Lisa” Haynie. It is the collaborative ideas of the NextGen, the Chairs and Co-Chairs from each committee and dare I say the “Older Gen” that made this successful. We all have the same goal: to see the success of our profession, and when we come together, it happens.

As I mentioned, it takes a village, or a chapter, so I extend a thank you to all of the firms that encouraged their millennials to get involved with the NYSSCPA, who saw the value in their involvement, not only to their firms’ and their clients’ benefit, but also to the benefit of their new staff members, who gain the opportunity to grow professionally and personally.

As one term ends a new one must begin, and I am passing the baton to someone who I am honored to call our next President, Dr. Anthony Basile. I invite all of you to join me at the installation of Dr. Basile as our 64th President of the NYSSCPA — Nassau Chapter on Wednesday May 31 at the Crest Hollow Country Club. His theme is "A Bridge from Academia to Practice," and I see him continuing to promote the goals that the State Society and our chapter have set in getting our millennials to become more active in the Society and the profession as a whole. In addition to Anthony, we welcome Alex Resnick as President Elect, Natalie Licul-Verbanac as Vice President, Geri Gregor as Treasurer and Vivian Martinez as Secretary, along with our newest board members, Jared Berman, Iola Damante, and Kristina Alberella.

Since busy season is behind us, the Nassau Chapter is in full swing with many events and activities. Please make sure to review the newsletter and chapter website for details. Many of the committees have their organizational meeting this June; if you are interested in getting involved, please make sure to reach out to that committee chair or fill out the slip on the last page of the newsletter.

The 16th Annual Ellen Gordon CPAs 4(a): Cause 5K Run/Walk to End Hunger will be held on June 17 at Eisenhower Park to benefit Island Harvest. Please see the flyer for sponsorship opportunities as all proceeds raised go to Island Harvest which is a great cause.

The Nassau Chapter will hold its Annual Golf Outing at the North Hills Country Club in Manhasset on Thursday, August 17. I encourage you to attend even if you don’t golf as they will have a beginner’s golf lesson as an alternative to a round of golf. This venue is amazing, the food is spectacular, and the prizes are always exceptional.

As I leave you, my next title is “Immediate Past President” of the Nassau Chapter, but I have been nominated to serve the Nassau Chapter as your representative on the NYSSCPA Board of Directors; if elected, I plan to share with the state board all of the good work we do in Nassau and keep the chapter informed about what is happening at the NYSSCPA at the state level. I will miss being the Nassau Chapter president; I really loved it. I met a lot of great people, I learned so much from all of them and look forward to maintaining those relationships and taking that knowledge with me as their representative at the state level.

Thank you again for the honor and privilege of allowing me to serve as your 63rd President.

Best Regards,

Lynne M. Fuentes, NYSSCPA Nassau Chapter President 2016-2017
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Save the Dates:

MAY 2017

64TH ANNUAL INSTALLATION DINNER
Wednesday, 5/31
6:00 PM – 8:30 PM
Crest Hollow Country Club, Woodbury
In Honor of Susan Gallo
Saturday, 7/8
12:00 PM – 6:00 PM
Huntington Station
In Honor of Susan Gallo
Saturday, 7/8
BLOOD DRIVE
(NCCPAP Event)
Saturday, 7/8
In Honor of Susan Gallo
3 Notch Court, Huntington Station
12:00 PM – 6:00 PM
Small Firm MAP Committee
Thursday, 5/18
M & A Update Due
Diligence Checklist & More
On Parade Diner, Woodbury
6:00 AM – 10:00 AM
Chapter Organizational Meeting
Wednesday, 5/24
Milleridge Inn, Jericho
8:00 AM
Financial Literacy Committee
Tuesday, 5/16
Debt is Dangerous and Intro to Franchising Practices
Cafe 58, Melville
8:00 AM – 9:00 AM
CFO Committee
Thursday, 5/25
Life Insurance as a Corporate & Financial Planning Strategy
Deloitte, Jericho
8:00 AM – 10:00 AM

JUNE-AUGUST 2017

Small Firm MAP Committee
Thursday, 6/15
Peer Review - Preparing & Reviewing
On Parade Diner, Woodbury
6:00 PM – 8:30 PM
15th Annual Ellen Gordon CPAs 4 (a): Cause 5K
Run/Walk to End Hunger
Saturday, 6/17
Eisenhower Park - Field 1 & 2
Registration - 8:00 AM
Race - 9:00 AM
Practice Continuity Committee
Friday, 7/28
Organizational Meeting and Round-table Discussion
Continuity & Succession Planning Issues
On Parade Diner, Woodbury
8:00 AM
NYSSCPA Nassau Annual Golf Outing
Thursday, 8/17
North Hills Country Club, Manhasset
Registration - 10:30 AM

Chapter Officials:

PRESIDENT
Lynne M. Fuentes, CPA

PRESIDENT ELECT
Anthony Basile, CPA

TREASURER
Alex Resnick, CPA

SECRETARY
Natalie Licul-Verbanac, CPA

DIRECTOR
(PAST PRESIDENT)
Philip H. Kanyuk, CPA

DIRECTORS
Nannette Watts, CPA
Kenneth Rick, CPA
Kenneth Hauptman, CPA
Wei Xu, CPA
Mark R. Cuccia, CPA
Vivian Martinez, CPA
Joshua S. Sechter, CPA
Pasquale Rafanelli, CPA

ACCOUNTING & AUDITING
Mark R. Cuccia, CPA
Tina M. Romano, CPA

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

CFO & FINANCIAL EXECUTIVES
Anthony Aronica, CPA
Joanne Krush, CPA

COOPERATION WITH BANKERS & CREDIT GRANTORS
Neal Korenberg, CPA

COOPERATION WITH EDUCATIONAL INSTITUTIONS
Anthony Basile, CPA
Abby Lucrezia

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

FINANCIAL PLANNING
Christine P. Hallahan, CPA
Eric M. Kramer, CPA, Esq.
Scott Sanders, CPA
Stuart R. Shapiro, CPA

FINANCIAL LITERACY
Jarred Berman, CPA

LITIGATION & FORENSIC SERVICES
Pasquale Rafanelli, CPA

MANAGEMENT OF ACCOUNTING PRACTICES
Louis Grassi, CPA

MEDICAL & OTHER PROFESSIONALS
John V. Pellitteri, CPA

MEMBERSHIP
Lyne M. Fuentes, CPA
Philip H. Kanyuk, CPA

NEXTGEN COMMITTEE
Wei Xu, CPA

NEXTGEN LIAISON
Mark Goldschmitt, CPA

PRESIDENT’S ADVISORY COMMITTEE
Scott Sanders, CPA
Lisa Haynie, CPA
James N. Kinney, CPA

PRACTICE CONTINUITY
Elro Bloom, CPA
Eliot Lebenhart, CPA
Craig R. Morris, CPA

REAL ESTATE COMMITTEE
Joel Dressner, CPA
Deana Wetzel, CPA

SMALL PRACTICE UNIT MAP
Kenneth Hauptman, CPA
Eliot Lebenhart, CPA
Alex Resnick, CPA
Scott Sanders, CPA

SPONSORSHIP COMMITTEE
Joshua S. Sechter, CPA

TAXATION COMMITTEE
Jack Angel, CPA
Robert S. Barnett, CPA
Iola Damante, CPA
Robert J. Schaffer, CPA

TECHNOLOGY
Mark Plostock, CPA

WOMEN’S FOCUS GROUP
Geri Gregor, CPA
Christine P. Hallahan, CPA
Elizabeth Oberg, CPA

Mark your calendars! Our 2nd annual CPA Fest will be held 11/2/17.

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www.nysscpa.org
New York State Society of CPAs – Nassau Chapter

64th Annual Installation Dinner

“A Bridge from Academia to Practice”

Wednesday, May 31, 2017

6:30 P.M.

Crest Hollow Country Club

Reserve your seat today!

Seats $100 per Person

Table of 10 $950

Register online today here.

For sponsorships and ads, email

VivianLevy1@gmail.com
UPCOMING: THE 64TH ANNUAL INSTALLATION DINNER

64th Annual
Nassau Chapter
INSTALLATION DINNER

Wednesday, May 31, 2017 | 6:30 p.m.
Crest Hollow Country Club, Woodbury

"A Bridge From Academia to Practice"

Officers: President Anthony Basile, CPA
          Treasurer Geri Gregor, CPA
          President-Elect Alex Resnick, CPA
          Vice President Natalie Verbanac, CPA
          Secretary Vivian Martinez, CPA

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

☐ GIFTS 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”)
  Eighth page: $225 (3.5” x 2.25”)
  Half page: $700 (7.25” x 4.75”)
  Business card: $100 (3.38” x 2”)
  Quarter page: $400 (3.5” x 4.75”)
  Submit original business card.

SPONSORSHIPS & ADVERTISING: To: VivianLevy1@gmail.com no later than Friday, May 5, 2017.
All sponsorship levels include recognition in our September newsletter. Include names of all guests below.

Tickets & Tables:

☐ TABLE OF 10: $950
  Number of tables: ________
  Number of tickets: ________

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

TICKET/TABLE RESERVATIONS: To: VivianLevy1@gmail.com no later than Friday, May 19, 2017.
Include names of all guests below.

Name: ____________________________ ____________________________ ____________________________
Firm: ____________________________ ____________________________ ____________________________
Address: ____________________________ ____________________________ ____________________________
City, State, Zip: ____________________________ ____________________________ ____________________________
Telephone: ____________________________ ____________________________ ____________________________
E-mail: ____________________________ ____________________________ ____________________________
Person Who Solicited You: ____________________________

BY CHECK payable to NYSSCPA Nassau Chapter
Mail to: Vivian Levy - NYSSCPA Nassau Chapter
       c/o Sanders Thaler Viola & Katz LLP
       350 Jericho Tpke, Suite 1
       Jericho, NY 11753

BY CREDIT CARD via PayPal*: Click HERE
* PayPal link for tickets/tables only.
** After paying email this form to: VivianLevy1@gmail.com

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NASSAU CHAPTER
www.nysscpa.org

VOLUME 61 ISSUE 7
MAY 2017
Report of the 2017-2018 Nominating Committee

NOMINATING COMMITTEE:
Chair: Robert Barnett, CPA, Esq.
Scott Sanders, CPA
Elizabeth Haynie, CPA

The Nominating Committee is proud to announce the Slate for the 2017-2018 Year:

OFFICERS:
PRESIDENT Anthony Basile, CPA
PRESIDENT-ELECT Alex Resnick, CPA
VICE PRESIDENT Natalie Verbanac, CPA
TREASURER Geri Gregor, CPA
SECRETARY Vivian Martinez, CPA

DIRECTORS:
Kristina Albarella, CPA Two-year Term ending 5/31/19
Jarred B. Berman, CPA Two-year Term ending 5/31/19
Mark R. Cuccia, CPA Two-year Term ending 5/31/19
Iola Damante, CPA Two-year Term ending 5/31/19
Nannette Watts, CPA One-year Term ending 5/31/18
Kenneth Rick, CPA One-year Term ending 5/31/18
Kenneth Hauptman, CPA One-year Term ending 5/31/18
Wei Xu, CPA One-year Term ending 5/31/18

The following are automatically selected:
DIRECTOR (PAST PRESIDENT) Lynne M. Fuentes, CPA
PRESIDENT Anthony Basile, CPA.

The election took place at the board meeting held on April 19, 2017 at 8:00 AM
at the Empress Diner 2490 Hempstead Tpke., East Meadow, NY
Andrea Elder-Howell succeeds in many areas of her professional and personal life, but what she most excels in is inspiring others. After beginning her career as an accountant, she went into law and served as a tax attorney for many years. Now, with more than 25 years of legal experience under her belt, working with complex commercial transactions, Mrs. Elder-Howell serves as commercial counsel for PSEG Long Island, responsible for negotiating vital energy power purchase agreements for the utility. She has truly achieved the best of both worlds.

But perhaps Mrs. Elder-Howell has found her greatest role to date as teacher. With her extensive knowledge of both accounting and the law, and through her dedication and desire to give back to her community, she has earned The Samuel B. Traum Achievement Award.

This award is given to those who devote themselves to assisting underprivileged women and youth, in furthering their knowledge of the business world and in their strivings toward success. Its namesake, Samuel B. Traum, was a leader in the accounting field who worked for more than 50 years to help women and people of color through his service with the Nassau Chapter of the NYSSCPA.

Mrs. Elder-Howell is continuing this commitment. Greatly appreciative of receiving the award and also a little surprised by the distinction, she notes, “I’m surprised and honored at the same time because I’m doing what I love to do. When I got the call about the award, I was like, ‘Gee I’m not even an accountant.’ So I’m just touched that I’m rewarded for doing something that I love.

“In terms of the award itself, I want to continue to live up to the merits of the award and to what Samuel Traum has achieved. I want to continue showing girls and boys just what they can have.

With involvement in COAP, Jack and Jill of America and Girl Scouts of Nassau County, I get to expose minority students to great opportunities. So I really want to continue to do what he did.”

Her commitment to the NYSSCPA cause began eight years ago, when she was asked to present at COAP (Career Opportunities in the Accounting Profession) and then eventually, co-chair. Then she became involved in recruiting. To get kids involved in the COAP program, Mrs. Elder-Howell and her co-chairs send letters out to local schools, interview the students who would like to be involved, and offer a one-of-a-kind, five-day, intensive curriculum.
The purpose of this immersive program is to provide high school juniors who might not otherwise get the chance, a perspective on career and financial opportunities available to them.

Mrs. Elder-Howell serves as a presenter on ethics, and helps to oversee and chaperone the entire program. She receives much-needed help from her colleagues in the accounting and teaching fields.

“We get professors and people who work in the business to provide workshops. There are classes on budgeting and business communication, on dressing for success and etiquette, and even field trips to CPA firms. We also bring in professionals to help the children build their resumes and prep for interviews. And of course there is an accounting course.”

The program begins with an intro to business class, and then one on networking. “What we are trying to do is to find students who are underrepresented (minority students), and bring them into the fold. We try to expose them to things they’ll find exciting, like forensic accounting. We even take them to Citi Field and give them a tour where we talk to them about the fact that there is an accounting and CPA side to even fun things like baseball.

“We don’t target students who necessarily want to be accountants but we open doors to students and show them what this profession can be all about.”

Mrs. Elder-Howell’s philanthropic activities don’t end there. For the past 12 years, she has sat on the board of the Nassau County Chapter of Jack and Jill of America, Inc. (an organization of African American highly successful mothers, including doctors, lawyers and business leaders, dedicated to raising the Next Generation of leaders) which enhances the lives of all children in the community. Each year they recruit students of color from local high schools for a full-day program on leadership in various careers. It’s a highly intensive summit that imparts the benefits of pursuing careers in the STEM fields. The organization provides scholarships and donations, and even helps the students themselves practice philanthropy on a local level. Last year, President Obama’s Deputy of Education attended and spoke to the students.

A big problem that children of color face today, feels Elder-Howell, is a lack of opportunity and exposure. “A lot of times they’re not exposed to what they can do. They don’t know what a CFO does and that the person talking to them right now is heading up the Bank of America on 5th Avenue. When you talk to people who look like you it lets you know that you can be successful. They see so much on TV that is negative, so we show them something different. We let them see a great reflection of themselves and the possibilities available to them.”

The Samuel B. Traum Achievement Award is not the only honor that Elder-Howell has received. As an adjunct professor at SUNY Old Westbury, she was drawn to the school because it reaches a large population of children from the boroughs who she felt were in need. And because of her ability to motivate and encourage her students, Mrs. Elder-
Howell was given the Driving Force Award, bestowed on by her by those she has taught and inspired.

So just how did Mrs. Elder-Howell get started herself? Growing up in Jamaica, Queens, she began with a solid dream and never really wavered from it. “I always wanted to be an attorney but my mother was more cautious and advised me to become an accountant as well. She is a product of the Great Depression and always said that no matter how bad the economy, everyone needs someone to handle their money.”

At Queens College, Mrs. Elder-Howell majored in accounting and upon graduation worked as an accountant for two years at NRDC (The National Resources Defense Council). Then, with a lot of support from her parents, put herself through law school, ultimately receiving her Juris Doctor degree from Rutgers School of Law.

After graduating from law school, she went to work for Arthur Andersen LLP for a time but Mrs. Elder-Howell wasn’t finished learning and growing. She went on to attend NYU, receiving a Masters of Law in taxation.

For most of her career, Elder-Howell has worked for huge public utilities. She has been employed by LILCO, KeySpan, Sempra Energy Trading, and now PSEG Long Island. She works on power purchase agreements for different types of renewables with engineers, providing legal counsel, and is especially excited to be working on the renewable energies project off the South Fork of Long Island, which will be the nation’s largest offshore wind farm. At PSEG Long Island, she also sits on the Diversity and Inclusion Council. “What I love is that we talk about the things most people are afraid to talk about,” she notes.

So just what does the future hold for Mrs. Elder-Howell? In addition to her responsibilities at PSEG, she plans on teaching at least one college-level course in the coming years. She wants to help children gain opportunities and success they might have never thought possible and provide the insight she’s gained in her long and storied career. Plus, with teaching, she’ll get summers off.
Robert S. Barnett, Tax Partner at Capell Barnett Matalon & Schoenfeld LLP, has been earning the respect and admiration of his colleagues for many years, and precisely because of that, he has now earned the prestigious NYSSCPA Distinguished Service Award. Per the NYSSCPA, this award officially “recognizes CPAs who have distinguished themselves as Society leaders and have given outstanding service to the Society and the profession through dedicated service, publications, public service and other activities.”

Mr. Barnett is absolutely thrilled by the honor. “I’m really very humbled because I think the recognition from my peers and friends, and people I’ve been working with for so long is a very moving thing; it really means a lot,” says Mr. Barnett. “It’s just very personally gratifying and I’m very touched. I know that some of the folks who have gone before have made the Society very rich and so for me to receive this award is inspiring. I’ve been a member of the Society really since graduating college, so it’s been a very important part of my life. It truly means a lot.”

Mr. Barnett has served as both president and as an executive board member of the Nassau Chapter of the New York State Society of CPAs, and has co-chaired the Taxation Committee for years. Despite his incredibly busy schedule, Barnett finds the time to give back, inform and teach his fellow CPAs. Specifically, he speaks at NYSSCPA’s all-day tax seminars, Estate & Financial Planning seminars and on other CPE courses at both the chapter and state level. “He is always volunteering his time and is always willing to help a fellow practitioner,” recounts a fellow member.

The topics he covers helps those in his profession to broach the interconnectedness of things. Barnett explains: “I like to speak about current topics that interact in taxation. A lot of my practice revolves around estate and trust issues. What I find most fascinating is when the estate and legal issues start coming together and juxtapose with tax issues. It shows how intertwined the disciplines are and how interconnected the knowledge has to be.”

“What you realize,” he continues, “is that in this era of specialization, there is a real importance in having a breadth of experience and I think that to some extent that is being lost today in the hyper-technicality of the profession. A perfect example of that is seen in the estate and S corporation areas; there are a lot of pitfalls and danger signs and unless you have that overall knowledge, in both areas, there are things that can be readily missed. I enjoy speaking about the areas where lines and quadrants meet, so these are the areas that most attract my attention.”
The reasons for his volunteering have changed throughout the years: “You know, it’s evolved,” Barnett muses. “I think that I personally get a lot of satisfaction from it, in the growth of my practice, and a lot of what I try to do is because of the people I work with who help me a lot in what I do. I have very practical and usable information to share and so I try to help them avoid some of the issues they could face, and teach them how to use their skills and acquire focus. I get a lot of pleasure in that.”

He admits that help is time-consuming, but definitely worth it. “It does take a lot of time, commitment and effort but when it’s something you really enjoy doing, you don’t look at it that way. I’ve found that the members from so many of the committees, especially at the COAP, are extremely generous with their time as well, so I don’t look at it as a sacrifice or a struggle. A lot of us do it very gladly.

“Everyone in my Taxation Committee is so committed and knowledgeable. When I look back on the strength of the NY State Society, it’s a tremendous source of lifeblood, and the people in the committees are all so involved in the day-to-day and important events that affect the practitioners in these areas; I’m just amazed in how much information they provide. They are meeting the needs of our membership at large, so it truly is a large group that has this deep commitment to the Society.”

In addition to his work at the NYSSCPA, Barnett’s philanthropy includes board membership at the Long Island Community Foundation, where he has donated his time for more than 25 years. He also works with the Nassau Academy of Law, where he helps in their educational promotions and conferences. With the Academy, he’s become very involved in teaching. “Nothing fires me up better than a well-attended and much-enjoyed conference. I want people to get great information at a low price.”

When thinking about where the NextGeneration of CPAs fits into the ever-changing world of taxation, Barnett points out his own strengths AND his weaknesses. “For those that know me, technology and I do not get along,” he laughs. “Except for my tax programs, I am virtually a neophyte, but I do understand the needs of work and family balance and the state our young practitioners are in. I think that the answers are in front of us and very achievable.” He sees the value in the increasing efficiency of technologies that allow everyone to work “virtually” but he also sees the downsides.

“I think that for young practitioners it’s also important to meet leaders in their field. That always drove me to meetings. I was always that young person in the back of the room in awe, thinking, ‘Wow, they have so much information.’

“I’d come away from meetings with a tremendous view of the committee members and always thought how important it was to meet them and know them as individuals; I saw the true benefit of it. I understand today there is less of a need to meet ‘in the flesh,’ so to speak. Now we work in more technical ways, and that’s okay. “

Barnett grew up in a simpler time on Long Island, in the ’50s and ’60s. “I think it was a great time and place to grow up—you had a lot of friends and neighbors all around you. Every house had three kids and they were all your friends. It was a very close-knit community.” His parents were great inspirations for him as well. Barnett’s father was a businessman, and Barnett was extremely interested in business through watching him, and he worked with his father all through college. “My mother was the more studious person, the bookworm,” he muses, “so I got that from her. It was a great combination, I think.”
Mr. Barnett attended Hofstra as an undergraduate but was an evening student, working his way through school and starting a family. “The first two courses I took were Business Law and Accounting 101,” he remembers. “I was interested in business and thought, Why not take both? I had a professor who was extremely interesting—he was a professor and a lawyer. I’m sure I was the youngest in the class; he picked on me a lot and I’m sure I learned a lot. I got a great education at Hofstra and was very prepared for the professional world because of it.

“Hofstra and all of the local schools are very important in the accounting community. Hofstra, Adelphi, LIU…they all have wonderful accounting programs. Also, I see and meet people all the time who went to the same schools, and we all had the same professors—it’s a nice thing to kind of compare notes.”

At C.W. Post, Barnett earned his master’s degree in taxation, before attending law school at Fordham, where he received his Juris Doctor degree. Finally, his school days were over. “I decided not to attend medical school,” he jokes.

Mr. Barnett began his prestigious career at the influential J.K. Lasser, which later merged into Touche Ross, one of the “Big 8.” Now, he specializes in estate and business succession planning as well as general business tax and financial succession, and structuring. On a day-to-day basis, he fields questions regarding partnership on the law side and from CPAs in the taxation arena. In addition, his firm works on areas of classification changes and debt reduction.

“A lot of times, CPA firms are our clients,” says Barnett. “And sometimes it’s another lawyer who reaches out to me. I guess that’s one of the benefits of my lecturing and involvement in the Society. For young CPAs, I would say attending meetings is so important because people get to know you and learn to have confidence in you, because they’ve met you and worked things out with you. Later, if issues arise that they need help with, they’ll consider you. That is why, for young CPAs, I recommend that they come and get to know others in their field.”

It’s ironic though, that he finds lecturing to be more comfortable than networking. “I always found lecturing to be comfortable because it’s something you can prepare for. I guess you can do role modeling to prepare for one-on-one interactions. But if you put me in the middle of a crowd, I get nervous. Put me in front of hundreds of people and I’m great.”

This is definitely the opposite feeling that most experience when speaking in front of large crowds. Barnett explains it this way: “I think it’s because I’m so confident in what I want to impart. I’m thinking about what I want to share, whether I want to make a joke, or provide examples in common usage for a complex problem, so I never get nervous. Put me in a quiet dinner party and I’m mortified.”

Going forward, Barnett feels that the Society would benefit from interacting with other societies, including the Bar Association. “These mutual events will attract both lawyers and CPAs. This way, we can attract professionals who will get to know more about what the State Society can do. It seems to me that the interconnectedness of groups is becoming more common. There are different models of interaction now and people are working to find that right balance.”

And this ties in perfectly with his own future plans. “I’m going to be increasing my time spent writing and lecturing, and in mentoring my own staff. I truly love lecturing and writing, so I’d like to see where I can take that. But what do they say? Man plans and God laughs.”
I hope those of you who attended enjoyed and learned from our April meeting on Retirement Planning Options for CPA’s. Options for succession and the decision to retire, not to retire, sell, merge or to just scale back are often difficult ones for CPA’s (though not for all). Our panel and participants offered lots of ideas for attendees to consider. Special thanks to our volunteer panel of Ken Hauptman, Larry Bloom, Eliot Lebenhart, Tim Sherman and Bob Goldfarb (along with yours truly) for presenting a variety of circumstances, perspectives and ideas about retirement options and outcomes.

As we all know, an important part of a CPA’s future includes succession planning and an exit strategy, whether it’s near term or long term. The Practice Continuity Committee is a resource to help with that planning, whether for retirement and succession or a strategy in case of death or disability.

For the 2016–17 Chapter year, we held four meetings on these topics:
- an organizational meeting and open discussion on why young accountants aren’t taking the CPA exam and what to do about it;
- a retired CPA’s perspective on life after retirement, the obstacles he encountered and how he found happiness;
- new perspectives on accounting practice sales by Harry L. Olson, President Accounting Broker Acquisition Group Inc.
- a panel discussion on retirement planning options for CPA’s in public practice.

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;
- a web forum to provide resources and exchange ideas with others who have similar concerns.

As a Committee member, you can upload content, send emails, view member profiles, and access other services.

Our 2017–18 season will begin on July 28, 2017 with an organizational meeting and a discussion topic to be announced (date subject to change). It will include a round-table 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 or contact us at ginette@morriscpas.com for more information. We look forward to your participation.

Craig Morris, Chairman
Presented Jointly by the Nassau Chapter Taxation and NextGen and Estate and Personal Financial Committees of the New York State Society of Certified Public Accountants

NEXUS - WHAT ARE YOU MISSING?
BY BRIAN GORDON, CPA

PROPOSED INCOME AND ESTATE TAX LAW CHANGES AND Q&A PANEL ON TAXES

SPONSORED BY: EQUINOX FINANCIAL PARTNERS

Wednesday, May 10, 2017 • 6:00 PM – 8:30 PM

DINNER AND WINE AT:
Chris and Tony’s
352 Jericho Tpke., Syosset, NY 11791

Please send your checks payable to: NYSSCPA Nassau Chapter
Mail Checks to: Iola Damante
Raich Ende Malter & Co.
175 Broadhollow Rd, Ste 250
Melville, NY 11747
Idamante@rem-co.com

Course Details:
CPE: 2 credits

Member Fee:
$35 (with dinner)

NextGen Committee members:
Only $15 (with dinner)

No Fee without dinner.

Conference and Committee Chairpersons:
Robert J Schaffer, CPA, Castellano, Korenberg & Co. CPAs PC
Robert S. Barnett, CPA, Esq., Capell Barnett Matalon & Schoenfeld LLP
Iola Damante, CPA, Raich Ende Malter & Co. LLP
Jack Angel, CPA, Fuentes & Angel CPAs LLC & Adelphi University
Jean-David Chery, CPA, Grassi & Co. CPAs PC
Wei Xu, CPA, Grassi & Co. CPAs PC
Scott Sanders, CPA, PFS, CGMA, CFP, CFS, Sanders Thaler Viola & Katz LLP
Eric M. Kramer, CPA, Esq., Farrell Fritz, PC
Stuart R. Shapiro, CPA, PFS, Shalik Morris & Co. LLP
Christine Hallahan, CPA, Own Account
M & A Update – Due Diligence Checklist and More

- Is it a Buyer or Seller’s Marketplace?
- What are the Trends in Valuations and Deal Structures?
- Demographic of Aspects of the Profession
- Prior to Doing a Merger, What are the Key Things You Need to Review in Due Diligence?
- What Can You Do to Make Your Firm More Attractive?
- What are the Keys to Retaining Clients?

Speaker: Joel Sinkin
President of Transition Advisors, LLC

CPE: 2 Credits Pending

Time: 8:00 AM – 10:00 AM (Be prompt!)

Place: On Parade Diner
7980 Jericho Turnpike, Woodbury, NY 11797

Cost:* $25 per person paid in advance
$30 per person (includes pre-registered)
paying at the door
Checks are payable to:
NYSSCPA - Nassau Chapter

Chairpersons: 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 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

NYSSCPA - NASSAU CHAPTER
SMALL-FIRM MAP COMMITTEE MEETING
Friday, June 15, 2017

This meeting is sponsored by: ACE Payroll

Peer Review – Preparing and Reviewing

- Learn what it takes to have an effective quality control system that leads to a clean, unmodified peer review report
- Learn how to prepare for your next review
- What can be done on a daily basis to create strong quality control environment for your firm
- Identify the most common, significant deficiencies that peer reviews uncover and what you can do to prevent them

Speakers: Robert J. Mauro, CPA,
Sanders Thaler Viola & Katz, LLP
Mark S. Lilling, CPA, Lilling and Company, LLP

CPE: 2 Credits Pending

Time: 8:00 AM – 10:00 AM (Be prompt!)

Place: On Parade Diner
7980 Jericho Turnpike, Woodbury

Cost:* $25 per person paid in advance
$30 per person (includes pre-registered)
paying at the door
Checks are payable to:
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NYSSCPA – NASSAU CHAPTER
SMALL-FIRM MAP COMMITTEE
June 15, 2017

On Parade Diner
7980 Jericho Turnpike, Woodbury, NY 11797

Please pre-register by calling Jean at (516) 938-5219
or you can email her at jtowens@st-CPAs.com or fax this page to (516) 938-0491.

Please mail your check to:
Scott Sanders, CPA, PFS, CGMA, CFP*, CFS
Sanders Thaler Viola & Katz, LLP
350 Jericho Turnpike, Suite 1
Jericho, New York 11753-1317

☐ I am enclosing a check for $______ at $25 per person, payable to NYSSCPA – Nassau Chapter
☐ I will be using my credit memo, which I will bring with me to the meeting.

Member #:
Name (print):
Firm:
Address:
Telephone:
Fax:
Cell:
Email:
CPA Cert #
Signature
Date

Member #:
Name (print):
Firm:
Address:
Telephone:
Fax:
Cell:
Email:
CPA Cert #
Signature
Date
16th Annual
Ellen Gordon
CPAs 4(a): Cause
5K Run/Walk to End Hunger

Saturday, June 17, 2017
Eisenhower Park, Field 1 & 2 • East Meadow, NY
(Access from Merrick Ave. entrance only)
Registration Starts at 8 am • Race Time: 9 am

Proceeds will benefit:
www.islandharvest.org

Music
Post-race food & refreshments

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

Sponsorship Opportunities
We are pleased to sponsor the CPAs 4(a): Cause 5K Run/Walk to benefit Island Harvest, A Food Bank for Long Island.

Please indicate the level of sponsorship:

☐ DIAMOND SPONSOR - $2,000 Includes color logo printed on the race tee shirt, display table during registration (sponsor provided), entrance for 13 runners/walkers and logo listing on the Island Harvest website.

☐ PLATINUM SPONSOR - $1,500 Includes color logo printed on the race tee shirt, display table during registration (sponsor provided), entrance for 10 runners/walkers and logo listing on the Island Harvest website.

☐ GOLD SPONSOR - $1,000 Includes black & white logo printed on the race tee shirt, display table during registration (sponsor provided), entrance for 6 runners/walkers.

☐ SILVER SPONSOR - $500 Includes company name printed on the race tee shirt, display table during registration (sponsor provided), entrance for 3 runners/walkers.

☐ BRONZE SPONSOR - $250 Includes company name printed on a 2' × 2' sign to be displayed at the event.

To register runners/walkers that are included in sponsorship, please email ken.rick@janoverllc.com.

PLEASE SUBMIT LOGO CAMERA-READY ART IN EPS FILE FOR DIAMOND, PLATINUM, AND GOLD LEVEL SPONSORSHIP
Due Date: May 23

Register Today!
www.Start2finish.com

For more information:
Kenneth Rick or Stacy Keyes
516-542-6300 • ken.rick@janoverllc.com
Nassau Chapter Financial Literacy Committee

presents

DEBT IS DANGEROUS AND INTRO TO FRANCHISING PRACTICES

Join the conversation with

LESLIE TAYNE, Esq.

Tuesday, May 16, 2017
Breakfast 8:00 AM - 9:00 AM
Café 58, 58 South Service Road, Melville

NO FEE

CPE: 1 Credit
CPE Code: 29031737

Please call Larry Just (631) 428-4829 or Nannette Watts (516) 506-8224 to RSVP
UPCOMING MEETINGS AND EVENTS

PRACTICE CONTINUITY COMMITTEE

Organizational Meeting and Round-table Discussion
Continuity and Succession Planning Issues
Friday, July 28, 2017, 8:00 AM

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

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

Dear Ginette:

☐ I will be attending the breakfast meeting at 8:00 AM.

☐ Enclosed is my check for $____ at $25.00 per person (Must be received by noon, Thursday, July 21) or;

☐ I prefer to pay $____ at $30.00 per person at the door. (Walk-in’s may be limited due to space availability).

Checks are payable to NYSSCPA, Nassau Chapter.

Note: Please RSVP by phone, fax or e-mail as early as possible.

Name: ________________________________________________
Firm Affiliation: __________________________________________
Address: __________________________________________________
Telephone: ________________________________________________
Email address: _____________________________________________
Networking with Accountants Annual Golf Outing
OPEN TO ALL PROFESSIONALS

NYSSCPA NASSAU CHAPTER
ANNUAL GOLF OUTING

Thursday, August 17, 2017
North Hills Country Club Manhasset, New York
Chairman: Neal Korenberg, CPA, Castellano, Korenberg & Co., CPA’s

RAIN OR SHINE RSVP By August 1, 2017

Reservations are on a first-come, first-serve basis with receipt of payment.
Golf Pricing on the next page. See special rate for NextGen CPAs.

10:30 am Registration
12:00 pm Shotgun
5:30 pm Cocktails/Buffet Dinner including Raffle Prize Drawing (cash or checks for raffles)

Sponsorships Available!
See next page for details.
Any questions? Carol Pinto
T: (516) 937-9500
F: (516) 932-0485
Email: cpinto@ck-co.com

New for 2017!
Mini-Clinic with the Pro!
Maximum attendees: 20 | No additional cost! First-come basis!
1-Hour Mini-Lesson Starts at 10:00 am Sharp! Must register specifically for the mini-clinic prior to golf outing to attend. No last-minute additions available. Call Carol Pinto to register for mini-clinic!

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, divots tools, towels, etc.

Caddies
Please remember that there will be caddies available at the outing. If you would like to have a caddie assigned to your foursome ahead of outing, 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., CPA’s
313 W. Old Country Road
Hicksville, NY 11801

☐ Foursome $1,500
   (includes free Tee sponsorship)

☐ Individual Golfer $425

☐ NextGen CPA’s Discounted Rate
   $285 per golfer

☐ Dinner $150 per person ____

☐ Mini-Clinic with the Pro!

Please note: Caddy’s fee is NOT included in
foursome or individual price(s).

Player(s) and/or Dinner Attendee(s) Name(s):
1. ____________________________
2. ____________________________
3. ____________________________
4. ____________________________

FIRM NAME FOR SPONSORSHIP: (For use on signs)

SPONSORSHIPS

☐ 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 – $150
   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.

Contact Person: ____________________________
Telephone: ____________________________
Email: ____________________________

Directions

New York via Long Island Expressway:
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.

Eastern Long Island via Long Island Expressway:
LIE West to Searingtown Road (Exit 36). Proceed
westbound on Service Road, pass Searingtown Road and
Shelter Rock Road. Continue approximately a half mile.
Entrance to clubhouse is on the right side.

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.
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 planned in advance by a group of active committee members. Prior to each seminar the committee allocates time for a “round-table” discussion. Prospective members should be a CFO, VP Finance or the most senior financial person at their company.

The CFO Committee meets on a monthly basis from September through June. Meetings are held at 8:00 AM at Deloitte’s office in Jericho. We arrange two dates with the Suffolk Chapter. Joint seminars with the Suffolk Chapter are held in Melville.

### Seminar topics for upcoming meetings are:

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Location (see below)</th>
</tr>
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</table>

### Prior Topics covered:

<table>
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<tr>
<th>Date</th>
<th>Topic</th>
<th>Date</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>October 2016</td>
<td>Tax Update</td>
<td>February 2017</td>
<td>Forensic Accounting</td>
</tr>
<tr>
<td>November 2016</td>
<td>GAAP &amp; Private Company Financial Reporting Update</td>
<td>March 2017</td>
<td>Understanding ESOPs</td>
</tr>
<tr>
<td>December 2016</td>
<td>Ethics - CPAs in Industry</td>
<td>April 2017</td>
<td>Corporate &amp; Board Governance</td>
</tr>
</tbody>
</table>

### Meeting time & format:

8:00 AM to 10:00 AM (2 CPE credits) – light breakfast served, $10 meeting fee

### Meeting locations:

Jericho / Deloitte - 2 Jericho Plaza, Jericho

### Committee Co-Chairs:

Joanne Krush, CPA, CFO SterlingRisk  
jkrush@sterlingrisk.com  (516) 773-8605  
Anthony Aronica, CPA, VP Finance Lindenmeyr Munroe  
aaronica@lindenmeyr.com  (631) 533-5015

Please contact Anthony Aronica or Joanne Krush if you'd like more information.
NYSSCPA Small-Firm MAP
Meeting Topics 2016-2017*

*Effective July 1, 2016

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Speaker/Moderator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursday</td>
<td>M&amp;A Update — Due Diligence Checklist and More</td>
<td>Joel Sinkin of Transition Advisors, LLC</td>
</tr>
<tr>
<td>May 18, 2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thursday</td>
<td>Peer Review – Preparing and Reviewing</td>
<td>Mark Lilling, CPA of Lilling &amp; Company CPAs</td>
</tr>
<tr>
<td>June 15, 2017</td>
<td>(Sponsored by Ace Payroll)</td>
<td>Robert Mauro, CPA of STVK, LLP</td>
</tr>
</tbody>
</table>

All meetings will be held at On Parade Diner, 7980 Jericho Turnpike, Woodbury, NY 11797
Time: 8:00 AM - 10:00 AM (full breakfast included)
Cost: $25.00 per person, paid in advance
Cost: $30.00 for pre-registrations 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

All meetings are held on Fridays unless otherwise noted.
*Please note: meeting dates, topics, and speakers are subject to change.
Speaker(s) TBD
SPRING 2017

Geared toward all professionals – joint event with Suffolk Litigation and Valuation Committee. **Topic:** Mock Trial Including the Do’s and Don’ts in Court.

*For more information, contact Pasquale Rafanelli at PRafanelli@grassicpas.com*
EVENT HIGHLIGHTS

PLANNING AND SUCCEEDING IN RETIREMENT FROM PUBLIC ACCOUNTING

Ken Hauptman, Larry Bloom, Eliot Lebenhart, Tim Sherman, Craig Morris and Robert Goldfarb speak to an audience of about 40 CPAs on retirement options.
EVENT HIGHLIGHTS

APRIL 20TH FINANCIAL LITERACY MEETING

Joe DonAngelo, Phil Kanyuk and Lawrence Just at the Financial Literacy Meeting held April 20 where Phil Kanyuk spoke on “Demystifying Financial Credentials.”

Wishing you all a relaxing summer.

See you in September!
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
☐ NextGen
☐ Practice Continuity
☐ Real Estate
☐ Small Practice MAP
☐ Sponsorship
☐ Taxation
☐ Technology
☐ Women’s Focus Group
☐ Other ________________

Name: ____________________________
Firm Affiliation: ______________________________
Address: ______________________________
City/State/Zip: ______________________________
Phone: ______________________________
Email: ______________________________

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

Advertising Opportunities

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

Like Us On Facebook
https://www.facebook.com/NYSSCPANassau

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

SPONSORSHIP

If you wish to sponsor any Nassau Chapter or committee event, download our sponsorship contract here 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
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:
Lynne M. Fuentes, CPA (516) 656-0800

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

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

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

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, CBS (516) 938-5219

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

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420 Jericho Tpke, Ste 321, Jericho, NY 11753 | Phone: (516) 656-0800
lynnefuentesangelcpas.com

Philip H. Kanyuk, CPA | Nussbaum, Yates, Berg, Klein & Wolpow, LLP
445 Broadhollow Road, Melville, NY 11747 | Phone: (631) 845-5252
Philip.kanyuk@NYBKW.com

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

MAIL AND EMAIL ADDRESS CHANGE FORM

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