A Message from the President

A year ago at this time I was busy writing my speech thanking you all for the honor of being installed as President of the Nassau Chapter. It’s hard to believe that a full year has gone by. It was one of, if not the, shortest years of my professional life as well as one of the most rewarding. This is the last President’s message that I get to deliver on behalf of the Chapter, so I figured I better make it a good one.

I would like to open with a thank you to Lynn Fuentes and Anthony Basile, our past presidents. Your guidance and assistance was invaluable. Natalie Verbanac (president-elect), Geri Gregor (vice-president), Vivian Martinez (treasurer) and Mark Cuccia (secretary), it has been a pleasure and honor to work with all of you. Our entire Chapter owes you all a huge thank you for the dedication and time that you have given the Chapter to ensure that the Nassau Chapter remains the Crown Jewel of the State Society.

Our Board of Directors are something of unsung heroes of the Chapter. Not only do they give their time, ideas and support to the Chapter, but almost every one of them has been, or is, a chair or co-chair of one or more committees. Our committees are our lifeline to the membership. Thank you all for everything you have done this past year and all that I am sure you will continue to do for the Chapter in the future.

On May 30, 2019 at the Crest Hollow Country Club in Woodbury, we will be installing our 66th President, Natalie Verbanac. I will be turning over the keys to the Chapter to an amazing and dedicated leader. It will be a great night of fun, music and networking. If you have not already registered for the dinner please do so, it is always a great evening.

On this night, we will also be honoring Lisa Haynie with the Distinguished Service Award for all she has done for the Chapter over the years. As much as I would like to be able to name all of her accomplishments and what she has meant to this Chapter, we would have to add several more pages to this newsletter and even then I could not list them all. For now let me say this, there is not a position in the Chapter she has not held, a committee that she has not served on or assisted, and there has not been a president that has not looked to her for answers and guidance at some point.

As part of my final message I would like to urge all of you to get involved with your Chapter. The more you give to the Chapter, the more you will get out of it as well. Our Chapter is only as strong as the support it gets from its members. All of our committees will be holding organizational meetings over the next several weeks, an excellent time to let them know what you want to get from the committee, as well as what you can contribute.

In addition to our upcoming installation dinner we will have our Ellen Gordon CPAs (4)a Cause 5k Run/Walk at Eisenhower Park and our Chapter’s Annual Golf Outing, as well as, many committee events. Please check our calendar for dates and details and join us at these events.

As I move on to the position of Immediate Past President, it is with a bit of sadness, as I have truly enjoyed my time serving as President. I thank you again for the privilege of serving as the 65th President of the New York State Society – Nassau Chapter. I look forward to my continued involvement as Co-chair of the Small-Firm MAP Committee and working with the Board on continuing to improve the Chapter for all members.

Sincerely,

Alex Resnick
NYSSCPA Nassau Chapter President 2018-2019
Chapter Officials:

PRESIDENT
Alex Resnick, CPA

PRESIDENT ELECT
Natalie Verbanac, CPA

VICE PRESIDENT
Geri Gregor, CPA

TREASURER
Vivian Martinez, CPA

SECRETARY
Mark R. Cuccia, CPA

DIRECTOR
(past president)
Anthony Basile, CPA

DIRECTORS
Kristina Albarella, CPA
Jack Angel, CPA
Jarred R. Berman, CPA
Jean David Chery, CPA
Iola Damante, CPA
Craig Morris, CPA
Alyssa Popov, CPA
Wei Xu, CPA

ACCOUNTING & AUDITING
Mark R. Cuccia, CPA
Tina M. Fasano, CPA
Franco Martorana, CPA

ATTORNEY & ACCOUNTANTS
Kristina Albarella, CPA
Anthony Basile, CPA

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

COOPERATION WITH EDUCATIONAL INSTITUTIONS
Anthony Basile, CPA

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

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

FINANCIAL LITERACY
Lawrence M. Just, CPA

LITIGATION & FORENSIC SERVICES
Pasquale Rafanelli, CPA

MANAGEMENT OF ACCOUNTING PRACTICES
Louis Grassi, CPA

MEMBERSHIP
Scott Sanders, CPA

NETWORKING WITH ACCOUNTANTS
Neal Korenb erg, CPA

NEWSLETTER
Natalie Verbanac, CPA
Lynne M. Fuentes, CPA

NEXTGEN COMMITTEE
Wei Xu, CPA
Jean David Chery, CPA
Garrick Turano, CPA
Alyssa Popov, CPA

NEXTGEN LIAISON
Lynne M. Fuentes, CPA

PRACTICE CONTINUITY
Larry Bloom, CPA
Eliot Lebenchart, CPA
Craig R. Morris, CPA

REAL ESTATE COMMITTEE
Vivian Martinez, CPA
Jodi Bloom-Piccone, CPA
Deana Wetzel, CPA

SMALL PRACTICE UNIT MAP
Kenneth Hauptman, CPA
Eliot Lebenchart, CPA
Alex Resnick, CPA

SPONSORSHIP COMMITTEE
Lynne M. Fuentes, CPA
Natalie Verbanac, CPA
Elizabeth Oberg, CPA
Roseana Almeida

TAXATION COMMITTEE
Robert J. Schaffer, CPA
Robert S. Barnett, CPA

WOMEN’S FOCUS GROUP
Geri Gregor, CPA
Elizabeth Oberg, CPA
Natalie Verbanac, CPA
Lisa Haynie, CPA

Save the Dates:

MAY 2019

NASSAU CHAPTER
66th INSTALLATION DINNER
Thursday, 5/30
Crest Hollow Country Club, Woodbury
6:30 PM

Financial Literacy
Tuesday, 5/14
Uniform Guidance,
OMB Awards, All Sections
Sweet Hollow Diner, Melville
9:00 – 10:00 AM

Small-Firm MAP
Wednesday, 5/15
Mergers & Acquisitions
On Parade Diner, Woodbury
8:00 – 10:00 AM

JUNE 2019

Small-Firm MAP
Wednesday, 6/12
Residency Audits and Issues
On Parade Diner, Woodbury
8:00 – 10:00 AM

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www.facebook.com/NYSSCPANassau

Connect With Us On LinkedIn
www.linkedin.com/groups?gid=5010322&mostPopular=true&trk=tas%3Anysscpa%20nas

Chartered 1953
NASSAU CHAPTER
www.nysscpa.org

VOLUME 64 ISSUE 1
MAY 2019
2
There is still time!
Purchase your
Installation Dinner
Sponsorship NOW!

SPACF FOR RENT
Woodbury Professional Office – Perfect for CPAs, EAs, Attorneys or other Professionals!
New, contemporary offices are now available for rent within Woodbury CPA firm. Amenities include reception services, conference room usage, kitchen, phone, internet, cable, copy and fax machines.
Offices from $1,200 – $2,500, workstations also available.
Please contact Craig at (516) 364-8888 for more information.

Looking for a few good volunteers....

You already know that the NYSSCPA Nassau Chapter is committed to providing you with many events and activities to broaden your experiences in the profession. Please consider furthering the value of your membership by joining us on a committee. See the Committee Service Application on the next to last page of the newsletter.

We are looking for people to chair our Community Affairs and Public Relations Committee. That committee has spearheaded the annual Ellen Gordon Walk/Run, blood drives, etc.
66th Annual
Nassau Chapter
Installation Dinner
Thursday, May 30, 2019 | 6:30 p.m.
Crest Hollow Country Club, Woodbury

Come Celebrate the 66th Anniversary of the Nassau Chapter

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<td>Ten (10) tickets to the event*</td>
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<td>Signage at the event</td>
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<td>Full-page ad in event program</td>
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<td>Eight (8) tickets to the event*</td>
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<td>Half-page ad in event program</td>
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<td>Six (6) tickets to the event*</td>
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<td>Quarter-page ad in event program</td>
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<td>Four (4) tickets to the event*</td>
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<td>Signage at the event</td>
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<th>COCKTAIL HOUR SPONSOR: $900</th>
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<td>Recognition in event program</td>
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<td>Four (4) tickets to the event*</td>
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<td>Prominent signage at the event</td>
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<th>WINE SPONSOR: $300</th>
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<td>Recognition in event program</td>
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<td>Signage on every table</td>
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<th>PROGRAM ADVERTISING:</th>
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<td>_ Full-Page Ad: $1250 (7.25” x 9.75”)</td>
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<tr>
<td>_ Half-Page Ad: $750 (7.25” x 4.75”)</td>
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<tr>
<td>_ Quarter-Page Ad: $475 (3.5” x 4.75”)</td>
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** ALL ADVERTISING WILL BE DUE BY MAY 10, 2019**

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

NAME:______________________________________  NAMES OF ATTENDEES:
FIRM NAME:__________________________________
ADDRESS:____________________________________
CITY/STATE/ZIP:______________________________
TELEPHONE:__________________________________
EMAIL:______________________________________

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

By CREDIT CARD VIA PAYPAL: https://cpe.nysscpa.org/product/30034

* Paypal link for table & individual registrations only.
All sponsorships and advertising will be billed by Vivian Levy.
NASSAU CHAPTER

Report of the 2019-2020 Nominating Committee

March 30, 2019

NOMINATING COMMITTEE:
Chair: Lynne M. Fuentes, CPA
Robert Barnett, CPA, Esq.
Elizabeth Haynie, CPA

The Nominating Committee is proud to announce the Slate for the 2019-2020 Year:

OFFICERS:
PRESIDENT  Natalie Verbanac, CPA
VICE PRESIDENT  Vivian Martinez, CPA
TREASURER  Mark R. Cuccia, CPA
SECRETARY  Kristina Albarella, CPA

DIRECTORS:
Kenneth Rick, CPA   Two-year Term ending 5/31/21
Michael Katz, CPA   Two-year Term ending 5/31/21
Elizabeth Oberg, CPA Two-year Term ending 5/31/21
Tina Romana, CPA   Two-year Term ending 5/31/21
Craig Morris, CPA   One-year Term ending 5/31/20
Alyssa Popov, CPA   One-year Term ending 5/31/20
Kenneth Hauptman, CPA One-year Term ending 5/31/20
Jean David Chery, CPA One-year Term ending 5/31/20

THE FOLLOWING ARE AUTOMATICALLY SELECTED:
DIRECTOR (PAST PRESIDENT)  Alex Resnick, CPA
PRESIDENT  Natalie Verbanac, CPA.
All meetings will be held at On Parade Diner, 7980 Jericho Turnpike, Woodbury, NY 11797

Time: 8:00–10:00 AM (full breakfast included)

Effective January 1, 2019 costs will be the following:

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

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

You can contact your Co-Chairmen as follows:

Eliot Lebenhart, CPA  
(516) 294-0400

Kenneth Hauptman, CPA  
(516) 364-8888

Alex Resnick, CPA  
(516) 364-8888

*Please note: meeting dates, topics, and speakers are subject to change.
Financial Literacy Committee

Uniform Guidance
OMB Awards • All Sections
Speaker: Kenneth Cerini, CPA

Tuesday, May 14, 2019
8:00 – 9:00 AM

Sweet Hollow Diner
(100 Broad Hollow Road, Melville, NY 11747)

COST: FREE

CPE: 1 Credit | Course Code: TBD

Please call Larry Just (631) 428-4829 to RSVP
Mergers and Acquisitions

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

To help reserve the proper space, please pre-register as follows: Either call Shannon at (516) 364-8888 ext. 900, email her at svolkerts@wmrcpa.com OR register online by going to NYSSCPA.org (then CPE, then scroll to our event).

Cost: Members: $30 per person paid in advance
      $35 per person (includes pre-registered)
      paying at the door
Non-members: $35 per person paid in advance
      $40 per person (includes pre-registered)
      paying at the door

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

WE LOOK FORWARD TO SEEING YOU THERE!

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

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

Please note – meetings are subject to change. Notifications will be sent to all registered attendees via email should this occur.
Wednesday, June 12, 2019
8:00 – 10:00 AM

NYSSCPA – NASSAU CHAPTER
SMALL-FIRM MAP COMMITTEE MEETING

Residency Audits
and Issues

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

To help reserve the proper space, please pre-register as follows: Either call Shannon at (516) 364-8888 ext. 900, email her at svolkerts@wmrcpa.com OR register online by going to NYSSCPA.org (then CPE, then scroll to our event).

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paying at the door

Non-members: $35 per person paid in advance
$40 per person (includes pre-registered)
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Alex Resnick, CPA

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Please note – meetings are subject to change. Notifications will be sent to all registered attendees via email should this occur.
On April 26, 2019, our Committee hosted its final meeting of the Chapter year. It turned out to be one of the best. Robert Goldfarb, CPA of Janover and Larry Lioz, CPA, formerly of Margolin, presented live. Michael Gaines, CPA, formerly of Friedman, presented remotely. This panel of CPAs, who have retired or will soon from CPA firms, discussed:

- initial considerations in succession and planning for retirement,
- concerns before and after,
- life in the semi or retired world and
- planning and creating a succession plan.

We had more than 40 participants hear and discuss all aspects of transition and retirement, whether or when to retire (or continue working) and arrangements to make before, during and after retirement. They discussed how they spend their time, their money and the “happiness” factor. Matters covered included:

- mental aspects;
- financial aspects, Social Security options and budgeting;
- importance of choosing the right successors and relationships after the close;
- preparing clients for change and transitioning them to new service providers;
- using experts in the transition;
- how you will spend your time in retirement;
- the importance of social connections;
- how the spousal relationship changes;
- staying healthy.

Audience participation and interest was enthusiastic and all in attendance were strongly complimentary on the presentation. Thank you to Larry, Bob and Michael for a presentation that all of us could enjoy, understand, appreciate and relate to.

The new Chapter year begins in June and we’ve tentatively scheduled the following dates for our meetings:

- July 26, 2019
- October 25, 2019
- January 31, 2020
- April 24, 2020

Our July meeting is organizational and you can bring your thoughts and ideas for future meeting topics or matters of interest. All meetings are planned to include CPE credit. Please remember to schedule our events in your calendar now, to avoid conflicts. Our meetings are generally held at On Parade Diner, the last Friday of the meeting month, though dates and locations are subject to change. Please note the new registration process — all registrations can be done at NYSSCPA.org (then CPE, Find Courses — scroll down to our meeting). For more information, on this meeting or our Committee, contact us at ginette@morriscpas.com. We look forward to your participation.

Craig Morris, Chairman
The Practice Continuity Committee

The Practice Continuity Committee held their final meeting of this chapter year on April 26, 2019. The panel, which consisted of CPAs, who have retired or will soon retire, discussed all aspects of transition and retirement.
The Nassau Chapter Women’s Focus Group

The Nassau Chapter Women’s Focus Group held its post-holiday cocktail party at the Garden City Hotel on January 10. Attendance was great and a good time was had by all. Shoes were also collected for the non-profit organization SFA (Shoes For All).
The Nassau Chapter Annual CPA Ethics Update

The Nassau Chapter Annual CPA Ethics Update was held at Chateau Briand on January 9. As always, it was a very necessary and informative event.

President Alex Resnick & President-Elect Natalie Verbanac present donation checks to FREE and Island Harvest at Ethics Event
Past President Anthony Basile, Ernest Smith and President-Elect Natalie Verbanac

Ita M. Rahilly (President-elect Mid-Hudson Chapter), Jan C. Herringer (President Manhattan Bronx Chapter), Joanne S. Barry (Ex Officio)

Presenter Ernest Smith
Nawrocki Smith LLP
Expand Your Knowledge — Join A Committee

Committee Service Application

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

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

Use the coupon to join a committee today!

Committee Service Application

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

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

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

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

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

SPONSORSHIP

If you wish to sponsor any Nassau Chapter or committee event, download our sponsorship contract here or contact

Vivian Levy
NYSSCPA Nassau Chapter
c/o KVLSM LLP
415 Crossways Park Drive, Suite C
Woodbury, NY 11797
Phone: (516) 294-0400 | Fax: (516) 938-0491
vivianlevy1@gmail.com
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. (516) 249-1919
LMM (Tax), CPA (IRS & NYS) (631) 465-5000
Noelle T. Geiger, Esq. (IRS & NYS) (516) 336-2447
Yvonne Cort, Esq. (IRS & NYS) (516) 931-8100
Brian Gordon, CPA (NYS) (516) 510-6041

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

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

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

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

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

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

Natalie Verbanac, CPA | Marcum LLP
750 3rd Avenue, New York, NY 10017 | Phone: (212) 485-5550
natalie.verbanac@marcumllp.com

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

<table>
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<tr>
<th>Newsletter</th>
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http://www.nysscpa.org/page/nassau-chapters-newsletters

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

NYS Society of Certified Public Accountants
MAIL AND EMAIL ADDRESS CHANGE FORM

CPA Certificate #: ____________________________
Name (Last, First, Middle Initial): ____________________________
Address: ____________________________
City/State/Zip: ____________________________
Home Phone: ____________________________
Email: ____________________________
Firm Name: ____________________________
Firm Address: ____________________________
City/State/Zip: ____________________________
Business Phone: ____________________________
Chapter Member: [ ] Yes [ ] No
Please send all mail to: [ ] Firm [ ] Home
Specify chapter: ____________________________
[ ] I would like to receive an email with a direct link to the newsletter on nysscpa.org

Return this form to:
Xio Fox, NYSSCPA, 14 Wall Street, New York, NY 10005

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Email: ____________________________
Firm Name: ____________________________
Firm Address: ____________________________
City/State/Zip: ____________________________
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