A Message from the President

That you are reading this means you survived another October 15, congratulations to you on another season in the books and to what hopefully will be a much less stressful time and a happier one — the beginning of the holiday season.

As Thanksgiving is quickly approaching, it is a time for us to be thankful for all that is good in our lives, and in this case to be thankful for all the great events that the Nassau Chapter will be bringing you in November.

In the spirit of giving, on November 27 we will be having our Attorney & Accountant Joint Committee Networking Event at The Fox Hollow Inn in Woodbury. Not only was this an amazing networking event last year with close to 200 people, but all profits from this event go to charity. This year’s beneficiary is the Family Residences and Essential Enterprises Inc. (FREE). In addition, we ask that you bring a non-perishable food item in exchange for a free raffle ticket; all food donations will go to the Interfaith Nutrition Network (INN), so join us for a great night that also benefits a couple of great charities.

November 14 will bring our third annual Student CPA Fest at Chateau Briand, with workshops during the day for students. We ask that you please join us that evening for dinner and networking with students. Our annual job fair is a great opportunity to recruit students from approximately 25 different colleges. Recruiting tables are still available — register at https://cpe.nysscpa.org/product/29722. Contact nysscpacollegefest@gmail.com for more info.

November 9 will be the joint Nassau/Suffolk Chapter all day A & A conference in Hauppauge and on November 30 and December 1, will be the Nassau Chapter Annual Tax & Financial Planning Conference. A big thank you to all the committee chairs for all their work that goes into planning these conferences – Mark Cuccia, Tina Fasano and Franco Martorana from our Accounting and Auditing Committee and two past presidents, Robert Schaffer and Robert Barnett, from our Taxation Committee.

I would like to congratulate the NextGen committee on their first Kickball Event. With about 50 people participating and everyone having a great time, I have a feeling this will become an annual event. Thank you Wei Xu, Jean David Cherry, Garrick Turano and Alyssa Popov for a great evening of fun.

As always I encourage you to attend these and other events that our chapter’s committees are running. Please see the calendar inside the newsletter for a full listing. Our committees are always looking for new blood so don’t just attend, consider getting involved as an active member and/or as committee co-chair. We have several committees with openings. Please feel free to contact me for more information.

As always I appreciate all your feedback, comments, thoughts and concerns regarding our chapter — always feel free to reach out to me at aresnick@wmrcpa.com.

Wishing you and your family a very Happy Thanksgiving and looking forward to seeing you all at the upcoming events.

Best Regards,

Alex Resnick
NYSSCPA Nassau Chapter President 2018-2019
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<td>Joint Nassau-Suffolk</td>
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<td>Radisson Hotel, Hauppauge</td>
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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 Cherry, 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

**ATTORNEY & ACCOUNTANTS**
Kristina Albarella, CPA
Anthony Basile, 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 Korenberg, CPA

**NEWSLETTER**
Natalie Verbanac, CPA
Lynne M. Fuentes, CPA

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

**PRACTICE CONTINUITY**
Larry Bloom, CPA
Eliot Lebenhart, 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 Lebenhart, CPA
Alex Resnick, CPA

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

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

**WOMEN’S FOCUS GROUP**
Gerig Gregor, CPA
Elizabeth Oberg, CPA
Natalie Verbanac, CPA
Lisa Haynie, CPA
They say that travel broadens the mind and expands the possibility for experience, and such is the case for Wei Xu, CPA, who has traveled far both geographically and professionally in her own journey.

Beginning that journey in Shanghai, China, Wei moved to New York more than 10 years ago, and the transition has been a smooth yet exciting one. Since Shanghai is the financial center of China, just like New York City is here in the States, Wei soon felt right at home. But she did enjoy the differences as well: “The benefits were great,” she recalls, “as I was able to learn about new cultures, work with people from different backgrounds and make new friends.” And she felt that the prospects were even greater here: “New York is a city with great opportunities for minorities and woman, compared,” says Wei.

Here in New York, she has climbed the corporate ladder quickly, just recently moving from a principal position as Tax Manager at Grassi & Co. to now fulfilling her leading role as Tax Manager at UHY LLP, Certified Public Accountants, and loves the heights she has achieved. As Tax Manager, in addition to reviewing tax returns, she both mentors and manages staff, which is gratifying, especially since she truly appreciates the help she received at the beginning of her career.

“In my earlier career, I received a lot of day-to-day training and support from my supervisors and coworkers, for which I am very grateful. With their help and guidance, I have learned so much about applying knowledge from school to real practice.”

Specializing in the fields of manufacturing, distribution and construction, she enjoys her relationship with her clients, and takes pride in providing them the best possible advice she can. Meeting face-to-face bi-yearly, she goes over their projections and tax returns and helps them to understand taxes from both a business and accounting standpoint. She greatly appreciates their gratitude in her assistance.

Wei’s arrival in the tax world of New York began at Hofstra University, which she attended to achieve her Masters in Accounting. There she met former NYSSCPA President Dr. Anthony Basile, her taxation professor, who then became a mentor to her. He led Wei to her role as an NYSSCPA Board Member and as Chair for the NextGen Committee. He was an inspiration to her.

“Both he and Lynne Fuentes, President before Dr. Basile, gave me great help in organizing events and pointed me in the right direction, to the NextGen Committee. At the beginning I was the only Chair and it was daunting. Then I recruited Jean Chery and since we now have two more Chairs, Alyssa Popov and Garrick Turano, things have become easier.”

The future looks bright for Wei both personally and professionally. With her compelling responsibilities on the Nassau Chapter NYSSCPA Board and as Co-Chair of its NextGen Committee, she is glad to be giving back to a profession that has been good to her.

Personally, Wei’s goals return to travel. She has made it an objective to visit one national park each year, and has recently traveled to Peru and Acadia National Park, in Maine. At UHY, she looks forward to continuing in her management role, helping to make the firm the best it can be.

Wei has achieved great success in a country she adopted just 10 years ago. Maybe the reason she has achieved such progress in her field is because of her own personal assessment on just how to do so: “Work hard, be curious, keep learning.”
For Nassau County’s NYSSCPA Taxation Committee, it’s all about the “Big Event”—their Annual Taxation Conference that takes place on the first weekend of every December. This seminal affair, actually a two-day event, will take place on both Friday, November 30 and Saturday, December 1 at the Uniondale Marriott, so that anyone who can’t attend one day can attend on either date or both. Each day, the Committee will host a luncheon, followed by edifying presentations from eight expert speakers. Usually the Committee can expect about 200 attendees to the event, but anticipate more than 300 this year.

The Taxation Committee has a long history of serving up educational and exciting events but used to actually be two committees—the Federal and State Committee and the Local Tax Committee. About five or six years ago, they decided to join forces, which led to greater attendance and participation at both meetings and events. Now, for this upcoming event, they’ve joined forces yet again, with the Estate and Financial Planning Committee, and in a way, have been operating as one committee. And again, participation has grown. As Co-Chair Bob Schaffer laughingly puts it, “Bigger is always better. I said, ‘Let’s combine our events and fill the dance floor.’” In addition to the annual conference, the committees held another joint event recently that brought in a greater influx of CPAs.

The Taxation Committee’s new focus is on major changes to the industry, of any kind. They are trying to create a couple of seminars each year that will truly pique the community’s interest, instead of the usual five or six that perhaps drew less members or attention.

Along those lines, they held two events in February that drew 120 people. The first, providing three CPE credits, on February 7, was termed “How the new tax law affects your clients.” However, since they hadn’t gotten through every facet of the law’s effects that day, they continued the seminar the following week. The first day delved into how the law affected individuals and the second, the changes to business practices. The “serial” forum was aptly titled, “How The New Tax Law Affects Your Clients — Part Two.”

But the main goal of the Committee is to train members for CPE on a more personal basis, as opposed to hosting them through webinars, where things can be more impersonal and create an inability for members to follow up and ask questions. “This way,” relates Bob, “they can ask questions and attend in person for a good price. We’re cheaper [than others] and give a better seminar; so that is our focus as of late.”

This has been a busy year for the Taxation Committee. On September 27, they held a forum on the new Section 199A proposed regulations, with the primary focus being a new 20-percent deduction for pass-thru entities and S corporations. And the events are involved, which is why Bob Schaffer, CPA and Senior Tax Manager at Castellano, Korenberg & Co., CPAs, relies on the help of his Co-Chair, Robert Barnett, Esq., CPA and Partner at Capell, Barnett, Matalon & Schoenfeld, in putting each of these illuminating seminars together.

Bob focuses more on the organizing of the events and the logistics, as well as advertising them and getting the word out. Robert Barnett schedules the speakers.
“So, we work well together,” recounts Bob Schaffer. “We definitely complement each other.”

Since they are both so busy most of that complementing gets done by phone and email. But, they would also like younger blood involved to help plan and attend events. “I would love to transition roles and stay in the background,” says Bob. “I’d like to see younger, newer ideas come in, and I’d like to get more involved with the NextGen Committee. We’ve worked with them in the past and it’s been great.”

Bob wants more CPAs involved because he feels it truly is important for the community. “It gives CPAs needed CPE and also, I think that we put on a really good event that people can truly learn from. After each event we get very positive feedback. I think it’s much better than doing something online or in a book—the interaction is important. When attending, they can ask questions at the seminar or even afterward. And then we give them comprehensive material that they can review. Also, it is important to meet fellow practitioners—you never know when CPAs can help each other.”

Going forward, Bob would like to focus on the Committee’s larger events, especially when there is a critical topic to discuss. “I like what we’re doing now with our signature event—the Annual Taxation Conference. But I’d like to see us putting on other, larger events, when we have an important topic to discuss. That, instead of covering random topics that we pick just because we haven’t done them in awhile. So, I can see us doing another event when regulations come out from the IRS regarding the new tax law. And any time they’re changing tax laws. Possibly after the elections there will be new regulations, so in December we’re planning a new seminar in relation to the new tax law.”

“Also, everyone wants to know how the new tax laws will affect those in different professions. People are worried that they’re not withholding enough and how different it will be this year. So it’s important for CPAs to let people know. I don’t want surprises in November.”

“Looking ahead, we really want to concentrate on the hot buttons. And there have been so many. In the future, I would also like to hold workshops, which would mean we’d concentrate on particular tax forms, partnerships, S Corporations, and personnel, so that we can go much more in depth on each topic. We’d have a few hours to just concentrate on each one in particular. That would be the plan for our future. If we’re not doing something specifically on the new tax law, I’d like to do various workshops.”

“We would welcome the community at large and especially staff at the CPA firms to attend, so that they can learn to prepare returns. And they do need training; its not just CPAs working at these firms—at the firms and the industry. It’s been a big problem that firms face—a staff training. If the staff is properly trained, it leaves less for the CPAs to worry about.”

— BOB SCHAFFER, CPA CO-CHAIR

ROBERT BARNETT, ESQ., CPA CO-CHAIR

“We would welcome the community at large and especially staff at the CPA firms to attend, so that they can learn to prepare returns. And they do need training; its not just CPAs working at these firms—at the firms and the industry. It’s been a big problem that firms face—a staff training. If the staff is properly trained, it leaves less for the CPAs to worry about.”

Working on the Taxation Committee requires a lot of time and effort from its two Co-Chairs, but as Bob knows, the rewards are great: “I love the comments from everyone attending our seminars—that they are fantastic and that they’ve learned a lot, and in particular that they’ve learned how to properly advise clients and prepare tax returns.”
As with every tax law change effecting business owners there are always winners and losers. If you feel like a loser with the 2018 Tax Reform Act perhaps something can be done to change that. We are speaking to owners of pass-through entities with qualified business income exceeding individual filing limits of $157,500 or $315,000 filing joint.

Retirement plan contributions can go a long way to reduce taxable income, but traditional solutions might not go far enough. With a typical 401(k) Profit Sharing plan the annual contribution limit is $61,000*. A contribution at that level might not lower the owner’s income to qualify for the full 20% deduction under the Tax Reform Act. A Cash Balance retirement plan design on the other hand might be the answer. A Cash Balance plan has the potential to allow for much higher contribution limits and could be the solution business owners are looking for.

Which business owners should consider a Cash Balance plan?

- Owners and partners looking to accelerate retirement savings.
- Owners and partners earning more than $275,000 that want to contribute and deduct more than $61,000* of income.
- Organizations already contributing 3%–6% of compensation to employees.
- Businesses that employ young, low-wage workers.
- Organizations that anticipate being profitable for the next 3–5 years.

Let’s consider a law firm that practices in the entertainment field and is highly profitable. Each partner has specified service business income of $500,000. They are 50 years old and will make maximum contributions of $61,000* each to their 401(k) Profit Sharing plan. The contribution lowers their net income to $439,000. Not even close to their goal of $315,000 to qualify for a full 20% deduction. If they had a Cash Balance plan each partner can make a $186,000 contribution, lower their income below the limit and qualify for a further 20% deduction.

In the News

Stuart R. Shapiro, CPA/PFS

Eric Monroe, Senior Associate, Standard Pension Services, LLC

Attn: Partnerships, S-Corps and Sole-Proprietors

Here is a creative way to lower taxable income and qualify for the 20% pass-through deduction under the 2018 Tax Reform Act
Instead of a $153,650 federal income tax liability ($439,000 × 35%), they would have a $60,288 federal tax bill ($314,000 – 20% × 24%). That is a tax savings of $93,362 per partner and pays for 50% of their retirement contribution.

Here are some of the current Cash Balance contribution limits. For tax year 2018, Cash Balance plans need to be set up by December 31 and funded by the entity’s tax filing deadline. Now is the time for your clients to engage a Third-Party Administrator or actuarial firm to model their options and determine if it makes sense to start a Cash Balance plan. There are start-up costs and potential employee contributions to consider, but with such a large deduction it might be worth it. Hopefully with this information more people feel like winners!

* with catch-up contribution if over 50 years old (2018 limits)

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Contributions to this article made by:

Eric Monroe is a Senior Associate with Standard Pension Services, LLC. He can be reached at 516-873-0090 x204 or emonroe@standardpensionservices.com

Stuart R. Shapiro, CPA/PFS is a partner at Shalik, Morris & Co., LLP and is a co-chair of NYSSCPA Nassau Chapter Estate and Personal Financial Planning Committee. Stuart can be reached at 516-338-8700 x1236 or SSHapiro@shalikmorris.com
Look for our 2018-2019 Sponsorship Opportunities coming soon.

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.

SPACE FOR RENT

Woodbury Professional Office – Perfect for CPAs, EAs, Attorneys or other Professionals!

New, contemporary offices are now available for rent within Woodbury CPA firm. Amenities include reception services, conference room usage, kitchen, phone, internet, cable, copy and fax machines.

Offices from $1,200 – $2,500, workstations also available.

Please contact Craig at (516) 364-8888 for more information.

Look for a few good volunteers....
UPCOMING MEETINGS AND EVENTS

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

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

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

Speaker: Daniel Markus
Valley National Bank

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

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

Designed for: Professionals involved in real estate engagements.

Course Level: Basic

Course Code: TBD

CPE Credits: 2

Cost: $20 for dinner and CPE presentation.
Can be paid either by check
(made out to the NYSSCPA – Nassau Chapter) or via the NYSSCPA website.

ACCOUNTING & AUDITING COMMITTEE

TUESDAY, NOVEMBER 13, 2018
Marks Paneth LLP
88 Froehlich Farm Blvd. (Lower Level)
Woodbury, NY 11797

Please RSVP ASAP via email, fax or mail to:
Tina M. Fasano, CPA
c/o Marks Paneth, LLP
88 Froehlich Farm Blvd. Suite 200
Woodbury, NY 11797
Phone: 516-992-5891
Fax: 516-992-5892
Email: tfasano@markspaneth.com

As always, we will be glad to go over any issues that may affect your practice. We start each session by asking our attendees about any issues or circumstances that they have come across in the recent few months. Our objective is to provide education and best practice guidance to the attendee regardless of firm size.

☐ I will be attending the dinner and CPE presentation.
☐ I will not be attending the session but wish to obtain information about future events.

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

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

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

DRESS PROFESSIONALLY | BRING RESUMES | FOOD & REFRESHMENTS

QUESTIONS? CONTACT: NYSSCPACOLLEGEFEST@GMAIL.COM
The CFO & Financial Executives Committee welcomes CPAs in industry to participate in our monthly meetings. The CFO Committee organizes monthly, interactive learning experiences guided by professionals of multiple disciplines. Our committee provides a confidential forum for industry CPAs at a senior level to seek advice, exchange guidance with fellow professionals and develop a resourceful peer group.

Education topics are selected in advance by a group of active committee members. Prior to each seminar the committee allocates time for a “roundtable” discussion. **Prospective members should be a CFO, VP Finance or the most senior financial person at their company.**

The CFO Committee meets monthly from September through May. Meetings are held from 8:00 AM to 10:00 AM. Thanks to the generosity of Deloitte, many of our meetings are held in a great space in Jericho. We plan two dates with the Suffolk Chapter which will be held in Melville.

*The following meetings have been scheduled:*

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<th>Date</th>
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<td>Understanding Blockchain</td>
<td>Marcum/Melville</td>
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<td>12/14/18</td>
<td>Tax Update</td>
<td>Deloitte/Jericho</td>
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<td>Banking &amp; Economic Update</td>
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*Dates for the following seminars will follow in the next newsletter:*

- Employment Law
- Healthcare & Benefits
- Understanding Bankruptcy

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

**Meeting locations:** Deloitte / Jericho – 2 Jericho Plaza, Jericho
Marcum/Melville – 10 Melville Park Rd, Melville

**Committee Co-Chairs:**

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

*Please contact Anthony Aronica or Joanne Krush if you’d like more information.*
Nassau Chapter Management of Accounting Practice

Upcoming Meetings

Tuesday, November 20, 2018
Roundtable Discussion

Wednesday, December 19, 2018
Speaker and Topic to be announced.

Location for all meetings:
Grassi & Co.
50 Jericho Quadrangle, Suite 200, Jericho, NY 11753

Start time for all meetings – 8:00 AM
Fee – NO CHARGE

Contact Lou Grassi at Lgrassi@grassicpas.com
A TECHNICAL MEETING PRESENTED BY THE
Real Estate Committee

Partnership Audit Rules – Update
Monday, November 26, 2018
6:00 – 8:00 PM

Chairpersons: Vivian Martinez, CPA
Deana Wetzel, CPA
Jodi Bloom, CPA

Speaker: Mark Wilensky
Meltzer, Lippe, Goldstein & Breitstone, LLP

Location: Marks Paneth LLP
88 Froehlich Farm Blvd. (Lower Level - Room LL 4)
Woodbury, NY 11797
(516) 992-5900

Designed for: Professionals involved in real estate engagements.

Course Level: Basic/Intermediate

Course Code: TBD

CPE Credits: 2

Cost: $20 for dinner and CPE presentation.
Can be paid either by check
(made out to the NYSSCPA – Nassau Chapter)
or via the NYSSCPA website.

To ensure we have adequate seating, please fax back or mail your reservation as soon as possible. Thank you.

MAIL TO:
Deana Wetzel, CPA
c/o Marks Paneth, LLP
88 Froehlich Farm Blvd., 2nd Floor
Woodbury, NY 11797
Phone: 516-992-5746
Fax: 516-992-5747
Email: dwetzel@markspaneth.com

Dear Deana:

☐ I will attend the CPE presentation at 6:00 PM which includes sandwiches and refreshments.
I have enclosed a check for $_______ at $25.00 per person, payable to the NYSSCPA — Nassau Chapter.

☐ I will attend the CPE presentation at 6:00 PM which includes sandwiches and refreshments. I have registered online via the NYSSCPA website.

(Please attach a list of names or attach business cards if paying for more than one attendee.)

Name:
Firm:
Email:
Address:

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

**Fundraising raffles throughout the event!**

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

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

**Event Details**

**Tuesday, November 27, 2018**

6pm - 9pm

The Fox Hollow
7725 Jericho Turnpike,
Woodbury, NY 11797

**Accountant Co-Chairs**

Kristina Albarella, CPA, MST
kristina.albarella@marcumllp.com
(631) 414-4624

Anthony Basile, Ph. D., CPA, CVA, CFE
abasile@basilecpa.com
(516) 741-5100 x11

Nannette Watts, CPA, ABV, CFF
nwatts@nwattscpa.com
(516) 506-8224

**Attorney Co-Chairs**

Elyssa Kaplan, Esq.
yyssa@ksclawgroup.com
(631) 683-8597

John Whiteman, Esq.
jwhiteman@josephlawpc.com
(516) 542-2000

Yvonne R. Cort, Esq.
ycort@cbmslaw.com
(516) 931-8100 ext. 370

---

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

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

Name ________________________________
Address ________________________________
Email ________________________________
Firm Affiliation ________________________________
Phone ________________________________

Attorney  Accountant

*Attendance is limited to attorneys and accountants only.*
November 30, 2018

TOPIC:
Peer Review

Speaker: Stuart Lang, CPA
CPE: 2 Credits Pending
Time: 8:00 – 10:00 AM (Be prompt!)
Place: On Parade Diner
7980 Jericho Turnpike, Woodbury
Cost:* $25 per person paid in advance
$30 per person (includes pre-registered)
paying at the door
Checks are payable to: NYSSCPA - Nassau Chapter

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

WE LOOK FORWARD TO SEEING YOU THERE!

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

Please note – meetings are subject to change. Notifications will be sent to all registered attendees via email should this occur.
Presented jointly by the Taxation and Estate & Personal Financial Planning Committees of the New York State Society of Certified Public Accountants

Nassau Chapter 66th Annual All-Day Tax Conference

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

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

CONFERENCE TOPICS & SPEAKERS

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

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

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

Program Details

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

Course Details
Course Level: Update
Prerequisite: None
Method of Presentation: Lecture
Field of Study: Taxation
Recommended CPE Credit Hours: 8

Developer: Foundation for Accounting Education
Course Code: Fri 28603923
Sat 28603924

Member Fee: $175
Non-member Fee: $250

Register online at www.nysscpa.org.
Register by fax at (866) 495-1354.
Register by phone at (800) 537-3635.
**Upcoming Meetings and Events**

**NYSSCPA Small-Firm MAP**

**Meeting Topics 2018-2019**

*Dates & Topics subject to change.*

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<tr>
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<th>Topic</th>
<th>Speakers</th>
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<tr>
<td>Friday, November 30</td>
<td>Peer Review</td>
<td>Stuart Lang, CPA</td>
</tr>
<tr>
<td>Friday, December 14</td>
<td>New Tax Law &amp; Pre-Tax Season</td>
<td>Alex Resnick, CPA Eliot Lebenshart, CPA Ken Hauptman, CPA</td>
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<tr>
<td>Friday, January 18</td>
<td>NY Estate Planning</td>
<td>TBA</td>
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<tr>
<td>Wednesday, February 20</td>
<td>Early Tax Season Issues</td>
<td>Round Table</td>
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**March — No Meeting**

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<th>Topic</th>
<th>Speakers</th>
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<tbody>
<tr>
<td>April Date TBD</td>
<td>Post Tax Season Blues</td>
<td>Round Table w/NCCPAP</td>
</tr>
<tr>
<td>Wednesday, May 15</td>
<td>Mergers &amp; Acquisitions</td>
<td>TBA</td>
</tr>
<tr>
<td>Wednesday, June 12</td>
<td>Residency Audits &amp; Issues</td>
<td>Karen Tenenbaum, Esq.</td>
</tr>
</tbody>
</table>

All meetings will be held at On Parade Diner, 7980 Jericho Turnpike, Woodbury, NY 11797

**Time:** 8:00 - 10:00 AM (full breakfast included)

**Cost:** $25.00 per person, paid in advance | $30.00 for pre-registrations paying at the door — no exceptions

*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 Lebenshart, 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.*
UPCOMING MEETINGS AND EVENTS

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

Accounting & Auditing Update
TUESDAY, DECEMBER 4, 2018

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

Speaker: George I. Victor, CPA, CGMA
         Giambalvo, Stalzer & Company, CPAs, PC

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

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

Designed for: Professionals involved in real estate engagements.

Course Level: Basic

Course Code: TBD

CPE Credits: 2

Cost: $20 for dinner and CPE presentation. Can be paid either by check
      (made out to the NYSSCPA – Nassau Chapter) or via the NYSSCPA website.

ACCOUNTING & AUDITING COMMITTEE
TUESDAY, DECEMBER 4, 2018
Marks Paneth LLP
88 Froehlich Farm Blvd. (Lower Level)
Woodbury, NY 11797

Please RSVP ASAP via email, fax or mail to:
Tina M. Fasano, CPA
c/o Marks Paneth, LLP
88 Froehlich Farm Blvd. Suite 200
Woodbury, NY 11797
Phone: 516-992-5891
Fax: 516-992-5892
Email: tfasano@markspaneth.com

As always, we will be glad to go over any issues that may affect your practice. We start each session by asking our attendees about any issues or circumstances that they have come across in the recent few months. Our objective is to provide education and best practice guidance to the attendee regardless of firm size.

☐ I will be attending the dinner and CPE presentation.
☐ I will not be attending the session but wish to obtain information about future events.

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

THURSDAY, December 13, 2018
6:15 – 9:00 pm*

SPECIFICS OF THE NEW TAX LAWS!

* Join us for a light dinner from 5:30pm – 6:15pm.

One of the most important provisions under the TCJA and the new accounting rules! Will any of your clients remain on accrual?

Acclaimed Lecturer - Eric P. Wallace, CPA will be discussing:

- Should you change your accounting method;
- Don’t be caught unaware of these rules;
- Learn about 3115’s required to change your method of accounting
- Benefits of the TCJA

DON’T MISS THIS LECTURE!!!

Other Topics covered will be:

- Prepaid expenses
- Inventories
- POC – important for the Construction Industry.

3 CPE will be earned during the event.

For more information contact Robert Schaffer, CPA at rschaffer@cka.co.com or 516-937-9500

PLACE: RXR Executive Park
Lower Level
68 S. Service Road
Melville, New York

Joint Chapter – Nassau & Suffolk
Hosted By:
Taxation, Real Estate & Personal Financial Planning Committees
Register at: www.nysscpa.org
Course code: 
--------------
Member Fee: $40
Non-member Fee: $50

Sponsored By:

CITY NATIONAL BANK
NYSSCPA - NASSAU CHAPTER
SMALL-FIRM MAP COMMITTEE MEETING

December 14, 2018

New Tax Law & Pre-Tax Season

Speakers: Alex Resnick, CPA,
Eliot Lebenhart, CPA,
Ken Hauptman, CPA

CPE: 2 Credits Pending
Time: 8:00 – 10:00 AM (Be prompt!)
Place: On Parade Diner
7980 Jericho Turnpike, Woodbury
Cost:* $25 per person paid in advance
$30 per person (includes pre-registered)
 paying at the door
Checks are payable to: NYSSCPA - Nassau Chapter

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

WE LOOK FORWARD TO SEEING YOU THERE!

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

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

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

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

Name (print): ___________________________________
Firm: _________________________________________
Address: _______________________________________
Telephone: _____________________________________
Facsimile: _____________________________________
Cell: ___________________________________________
Email: _________________________________________
CPA Cert #: ___________________________________

Signature _______________________________________
Date ___________________________________________
Nassau Chapter
Practice Continuity Committee

On October 26, 2018 members of the Capital Group Private Client Services team spoke on the topic of “Life after the Sale of Your Practice.” The topic appealed to a wide audience of firm owners and partners who must consider the ultimate transition of their practices and how life changes after a lifetime of client services. Speakers addressed preparing emotionally for leaving a firm; moving on to the next stage of life; how practice sales affect not just the CPA but families also; desired lifestyle after a sale and how to achieve it; transactional issues and concerns and; reasons to work or not to work after selling a practice (not just financial reasons). This presentation generated lots of thought-provoking ideas and we thank the team at the Capital Group for this excellent presentation.

January 25, 2019 we will be addressing “Solutions to Cybersecurity Risks.” Our April 2018 meeting was devoted to cybersecurity risks, what they are and how to know when risks are present. Many of our participants asked what can be done to protect against them. Cybersecurity and insurance specialists will advise us on how we can prevent or protect against cyber risks.

April 26, 2019 is our final meeting of the Chapter year, with a topic to be announced later.

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

Craig Morris, Chairman
Practice Continuity Committee

Solutions to Cybersecurity Risks

Friday, January 25, 2019, 8:00 AM

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

Ginette Morris
Craig Morris & Company
356 South Oyster Bay Road
Syosset, NY 11791

Dear Ginette:

☐ I will be attending the breakfast meeting at 8:00 AM.
☐ Enclosed is my check for $_____ at $25.00 per person (must be received by noon, Thursday, January 24).
☐ I prefer to pay $____ at $30.00 per person at the door. (Walk-ins may be limited due to space availability).
☐ I am not a member of NYSSCPA. Enclosed is my check for $____ at $35.00 per person.

Checks are payable to NYSSCPA, Nassau Chapter.

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

Name:

Firm Affiliation:

Address:

Email:

Telephone:
Save the Date

Nassau Chapter

66th ANNUAL INSTALLATION DINNER

THURSDAY, MAY 30, 2019
6:30 P.M.
CREST HOLLOW COUNTRY CLUB
WOODBURY, NY
Financial Literacy

Below left-to-right: Dan Mazzola, CPA, Rich Weinstein, Gerard Simonelli, Gracemarie Horan-Luce, Patricia Cimpric, at the annual Financial Literacy Day held at Freeport Library on October 26.
Practice Continuity

Greg Singer, Becky Creavin and Patricia Janco-Tupper of Capital Group Private Client Services speak to the Practice Continuity Committee on October 26. The topic was *Life After the Sale of a Practice.*
EVENT HIGHLIGHTS

NextGen Kickball Event

The Nassau Chapter NextGen Committee held their first kickball event on October 17. The committee co-chairs, Wei Xu, Jean David Chery, Garrick Turano, and Alyssa Popov, did a fabulous job putting this event together. A fun time was had by the approximately 50 participants and we anticipate that this will become an annual event.
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
☐ Other

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

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

Please forward your response to:
Natalie Verbanac, CPA  |  Marcum LLP
750 Third Ave, New York, NY  10017
Natalie.verbanac@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%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.
LLM (Tax), CPA (IRS & NYS) (631) 465-5000
Noelle T. Geiger, Esq. (IRS & NYS) (516) 336-2447
Yvonne Cort, Esq. (IRS & NYS) (516) 931-8100
Brian Gordon, CPA (NYS) (516) 510-6041

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

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

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

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

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

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

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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

Like Us On Facebook
www.facebook.com/NYSSCPANassau
Connect With Us On LinkedIn
www.linkedin.com/groups?gid=5010322&mostPopular=&trk=tyah&trkInfo=ta%3Anysscpa%20nas

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

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

Chartered 1953
NASSAU CHAPTER
www.nysscpa.org

VOLUME 63 ISSUE 4
NOVEMBER 2018
28