A Message From The President

Now that fall is in full swing and the September 15 filing deadline is behind us, I want to wish everyone much success with the upcoming October 15 filing deadline and remind you all to take advantage of the downtime that will follow. Let’s plan to recharge our batteries and get ready for the holidays to roll in, with another great busy season that will be right behind it.

The end of summer was our chapter’s traditional planning period and, as such, our membership was busy setting up the events that make our chapter one of the most active in New York State.

We have a number of great events to look forward to in October and November. Please take a look at the newsletter to see all of the various committee meetings and activities that are planned for the coming months. Log those “save the date” notices into your schedules and take advantage of all that our chapter has to offer.

The Cooperation with Bankers and Credit Grantors Committee is co-sponsoring a CPA/Bankers networking event on Thursday, October 22 at The Main Event in Farmingdale. This event is one of two annual CPA/Bankers networking meetings that we co-sponsor with the Suffolk Chapter; the next one will be in January 2016.

On October 24, the Tax Committee will be holding an extremely instructive half-day seminar from 9 a.m. to 12:40 p.m. at the New York Life Insurance Company offices in Melville. The seminar will cover an array of important topics, including the new ACA information reporting requirements; year-end tax planning; federal, New York State and sales tax updates; and much more. Registration for this event is online. Please visit our chapter website to register: [www.nysscpa.org/Nassau](http://www.nysscpa.org/Nassau).

Our “Mentor a Student Night” will be held on November 12 at Chateau Briand in Carle Place. I encourage the Nassau membership to send a firm representative to attend this event and help pass along your experience and knowledge to the next generation of CPAs. I can’t stress how important it is to be a mentor — both from a giving and receiving standpoint. This event is being held in conjunction with administrators from colleges in Nassau County, along with students and faculty from their accounting departments. For more information and to attend, please contact Michal Katz, Anthony Basile or Abby Lucrezia and see the registration flyer inside this newsletter.

I am very proud to announce that the newly formed and very active Financial Literacy Committee is holding a one-day seminar to teach the public about financial issues. This event will take place on Saturday, October 3 at the satellite location of Molloy College’s Suffolk Center on Route 110 in Farmingdale.

November 7 will be the date of our Accounting and Auditing Committee’s annual all-day conference. We’ll be sure to pass along more details about this event once they are available, so please hold the date. November also brings our “Neturkeying Feud,” which is being held by the Attorney and Accountants Joint Committee on November 24. Just in time for Thanksgiving, this evening of fun will allow our members to take a well-deserved break from their hardworking schedules and just enjoy each other’s company. The networking event is being held at Carlyle at the Palace in Plainview.

I encourage all of you to attend as many seminars and events included in this newsletter as possible and to visit our Chapter’s website, [www.nysscpa.org/nassau](http://www.nysscpa.org/nassau). Please get involved and realize all the benefits that this chapter has to offer.

Best Wishes,

Philip H. Kanyuk, CPA
NYSSCPA — Nassau Chapter President, 2015-2016
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### Save The Dates:

#### OCTOBER 2015

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<th>Event</th>
<th>Date/Time</th>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>Chapter Meeting - Joint Nassau/Suffolk Banker/CFA Accountant Networking Event</td>
<td>Thursday, 10/22</td>
<td>The Main Event, Farmingdale</td>
</tr>
<tr>
<td>Accounting &amp; Auditing</td>
<td>Tuesday, 10/20</td>
<td></td>
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<tr>
<td>Debit Issuance Costs/Going Concern/EBP Update/Fair Value</td>
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<tr>
<td>Berdon LLP, Jericho</td>
<td>Dinner 6 PM</td>
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<tr>
<td>Presentation — 6:30 PM</td>
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<tr>
<td>CFO &amp; Financial Executives</td>
<td>Wednesday, 10/21</td>
<td></td>
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<tr>
<td>Tax Update</td>
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<tr>
<td>Deloitte, Jericho</td>
<td>8 to 10 AM</td>
<td></td>
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<tr>
<td>Financial Literacy Committee</td>
<td>Thursday, 10/22</td>
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<tr>
<td>Sanders Thaler Viola &amp; Katz, LLP, Jericho</td>
<td>8 to 10 AM</td>
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<tr>
<td>Real Estate</td>
<td>Tuesday, 10/27</td>
<td></td>
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<tr>
<td>Alternative Financing for Real Estate Projects</td>
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<tr>
<td>Millerdige Inn, Jericho</td>
<td>Dinner — 6 PM</td>
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<tr>
<td>Technical — 7 to 9 PM</td>
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<tr>
<td>Small Practice Unit MAP</td>
<td>Friday, 10/16</td>
<td></td>
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<tr>
<td>Billing</td>
<td>On Parade Diner, Woodbury</td>
<td>8 to 10 AM</td>
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#### NOVEMBER 2015

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<thead>
<tr>
<th>Event</th>
<th>Date/Time</th>
<th>Location</th>
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<tr>
<td>Chapter Meeting Attorney Accountant Networking Event</td>
<td>Tuesday, 11/24</td>
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<tr>
<td>Carlyle at the Palace, Plainview</td>
<td>6 to 9 PM</td>
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<tr>
<td>Attorney &amp; Accountant Joint Committee</td>
<td>Tuesday, 11/24</td>
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<tr>
<td>Attorney/Accountant Networking Event Carlyle at the Palace, Plainview</td>
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<tr>
<td>Wednesday, 11/18</td>
<td>Estate &amp; Succession</td>
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<td>Planning for Real Estate Owners and Investors</td>
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<td>Millerdige Inn, Jericho</td>
<td>Dinner — 6 PM</td>
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<td>Technical — 7 PM</td>
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<tr>
<td>CFO &amp; Financial Executives</td>
<td>Thursday, 11/12</td>
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<td>Healthcare/ACA update &amp; IRS reporting requirements</td>
<td>Melville — TBD</td>
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<tr>
<td>Small Firm MAP</td>
<td>Friday, 11/20</td>
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<tr>
<td>Collections</td>
<td>On Parade Diner, Woodbury</td>
<td>8 to 10 AM</td>
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<tr>
<td>COOPERATION WITH BANKERS &amp; CREDIT GRANTORS</td>
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<tr>
<td>Neal Korenberg, CPA</td>
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<td>COOPERATION WITH EDUCATIONAL INSTITUTIONS</td>
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<tr>
<td>Anthony Basile, CPA</td>
<td>Michael D. Katz, CPA</td>
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<td>Abby Lucrezia, CPA</td>
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<td>COOPERATION WITH BUSINESS  &amp; PERSONAL</td>
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<td>Cooperations</td>
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<td>Technology Committee</td>
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<td>Mark Plostock, CPA</td>
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<td>TAXATION COMMITTEE</td>
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<tr>
<td>Robert S. Barnett, CPA</td>
<td>Iola D’Amante, CPA</td>
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<td>Robert J. Schaffer, CPA</td>
<td></td>
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<tr>
<td>WOMEN’S FOCUS GROUP</td>
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<tr>
<td>Geri Gregor, CPA</td>
<td>Christine P. Hallahan, CPA</td>
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<tr>
<td>Elizabeth Oberg, CPA</td>
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<td>YOUNG CPAS</td>
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<tr>
<td>Carmelina Hernandez, CPA</td>
<td>Joshua S. Sechter, CPA</td>
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<tr>
<td>Scott Sanders, CPA</td>
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<td>Scott Sanders, CPA</td>
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</table>
Our Nassau Chapter Practice Continuity Committee is here to provide members with a resource for education, networking and assistance with concerns about firm succession. We’ve done part of this through quarterly meetings with outstanding speakers who address our audiences with issues of major concern. These speakers generally have personally experienced continuity concerns or are in the business of helping those of us who do. Our October meeting continues to build on this tradition.

On October 23, Edward Mendlowitz, CPA and Partner at WithumSmith+Brown will discuss Succession and Retirement Planning for CPA Firms. Ed worked in a small firm environment before joining WSB and developed several very successful firms. He has authored 16 books, edited four others and has written hundreds of articles for business and professional journals and newsletters. You’ve probably seen his blog on the NYSSCPA Exchange or elsewhere. He has spoken on practice management for the AICPA and the New York, New Jersey and Connecticut State Societies of CPAs, as well as many other professional accounting groups. Our members say we’re in for a rare treat. You can learn more about Ed or the firm at www.withum.com and for some un-CPA-like entertainment check out the videos on their “careers” page.

In planning the 2015/2016 year, we set our future meeting schedule, as follows:

• January 22 — Bill Carlino will speak about the latest in accounting firm mergers and acquisitions. Bill joined Transition Advisors (a CPA mergers and acquisitions firm) after serving for nearly 12 years as editor-in-chief and editorial director of Accounting Today, at which he was responsible for all content. During his tenure, the publication won a number of financial journalism awards. He has been a frequent industry speaker, presenter and panel moderator, and has appeared as an expert commentator on such business channels as CNBC, Reuters, Bloomberg, CNN and National Public Radio (NPR).
• April 29 — Mark Perlson, CPA/PFS of Perlson LLP, will lead a panel of speakers on staff development, making them partners and solving the succession issue with home grown talent. Mark founded Perlson in 1985 as a small, two-person firm. Perlson LLP has since grown to become a significant multi-staff New York area firm, with an additional office in Charleston, South Carolina. Mark and his panel will give us insight into how to build a team capable of transitioning your CPA firm in succession.

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 October 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 seeing you,

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

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

**Employee Benefits**

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

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

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

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

**Sponsorship**

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

We are looking for committee members to help find sponsors and match them to our many events.

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

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

Chartered 1953
NASSAU CHAPTER

63RD ANNUAL
INSTALLATION DINNER

WEDNESDAY, MAY 25, 2016
6:30 P.M.
CREST HOLLOW COUNTRY CLUB
WOODBURY, NY
UPCOMING MEETINGS AND EVENTS

MAY 25, 2016, 63rd ANNUAL INSTALLATION DINNER

SIGN UP AND PAY BY DEC. 31, 2015
TAKE 20% OFF CONTRACT RATES

SIGN UP AND PAY BY JAN. 31, 2016
TAKE 15% OFF CONTRACT RATES

SIGN UP AND PAY BY FEB. 28, 2016
TAKE 10% OFF CONTRACT RATES

FOR DINNER SPONSORSHIP CONTRACT AND INFORMATION
CONTACT VIVIAN LEVY AT VIVIANLEVY1@GMAIL.COM
UPCOMING MEETINGS AND EVENTS

Don’t Fumble... Score a Networking Touchdown!
Thursday, October 22, 2015 | 6 to 9 p.m.

Join the Cooperation with Bankers Committee, Suffolk & Nassau Chapters at the

Fall 2015 Banker/CPA Networking Event

at The Main Event
1815 Broadhollow Rd, Farmingdale

$60 per person, advance registration | $70 at the door
Includes open bar and appetizers | dinner | dessert

RSVP by October 15 to dgerstner@bethpagefcu.com

Name: ___________________________ Firm: ________________________________
Address: __________________________ City, State, Zip: _______________________
Telephone: __________________________ Email: ____________________________

I am a member of the ___ Suffolk ___ Nassau Chapter Subscription Program (check not enclosed).

PAYING BY CREDIT CARD: Click HERE to register online.
PAYING BY CHECK, payable to NYSSCPA Suffolk Chapter, to: Debbie Gerstner|Bethpage Federal Credit Union
899 S. Oyster Bay Road, Bethpage, NY 11714
(516) 349-6886, DGerstner@bethpagefcu.com

Sponsorship opportunities available! Contact dgerstner@bethpagefcu.com
Presented by the Nassau Chapter Taxation Committee New York State Society of Certified Public Accountants

Nassau Chapter Annual Half-Day Tax Conference

Sponsored by New York Life Insurance Co.

Saturday, October 24, 2015
New York Life Insurance Company
576 Broadhollow Road
Melville, NY 11747

CONFERENCE TOPICS

• Federal and New York State Tax Updates
• The New ACA Information Reporting Requirements
• Tax Benefits of Captive Insurance Companies
  • Sales Tax Update
  • Year End Tax Planning

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.

Conference and Committee Chairpersons:
Robert Schaffer, CPA, Castellano, Korenberg & Co. CPAs, P.C.
Robert S. Barnett, CPA, Esq., Capell Barnett Matalon & Schoenfeld LLP
Iola Damante, CPA, Raich Ende Malter & Co. LLP

Course Details:
Time: 9 a.m. to 12:40 p.m. (check-in begins at 8:30 a.m.)
Course Level: Update
Prerequisite: None
Method of Presentation: Lecture
Field of Study: Taxation
Recommended CPE Credit Hours: 4
Developer: Foundation for Accounting Education
Course Code: 28603621
Member Fee: $50
Nonmember Fee: $75

Register online at www.nysscpa.org
Register by fax at (866)495-1354 | Register by phone at (800) 537-3635
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. Our monthly education topics are planned in advance by a group of active committee members. Prior to each seminar, the committee allocates time for a “roundtable” discussion.

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

<table>
<thead>
<tr>
<th>DATE</th>
<th>TOPIC</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/21/15</td>
<td>Tax Update</td>
<td>Jericho/Deloitte</td>
</tr>
<tr>
<td>11/12/15</td>
<td>Healthcare/ACA update and IRS reporting requirements</td>
<td>Melville — 68 S. Service Rd</td>
</tr>
<tr>
<td>12/10/15</td>
<td>Fiduciary and Trustee Responsibilities of 401k Plans</td>
<td>Jericho/Nixon Peabody</td>
</tr>
<tr>
<td>01/14/16</td>
<td>The Financial, Legal and Practical Process of Selling a Company</td>
<td>Jericho/Deloitte</td>
</tr>
<tr>
<td>02/11/16</td>
<td>Estate Planning for the Closely Held Business</td>
<td>Melville/Marcum LLP</td>
</tr>
<tr>
<td>03/10/16</td>
<td>Banking Market Update</td>
<td>Jericho/Deloitte</td>
</tr>
<tr>
<td>04/21/16</td>
<td>Buy-Sell Agreements</td>
<td>Jericho/Deloitte</td>
</tr>
<tr>
<td>05/19/16</td>
<td>Internal Control/Fraud/Cyber Security Techniques</td>
<td>Jericho/Deloitte</td>
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</tbody>
</table>

Committee meetings are held on a monthly basis from September through June.

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

MEETING LOCATIONS:
Jericho/Deloitte 2 Jericho Plaza, Jericho
Jericho/Nixon Peabody 50 Jericho Quad, Jericho
Melville Nov 12 — 68 South Service Rd, lower level
Feb 11 — 10 Melville Park Road (Marcum LLP)

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

Please RSVP:
Email this form to: aaronica@graphicpaper.com
Or fax this form to: 631-439-8822

CFO COMMITTEE MEETING RSVP
Meeting date: __________
Name: ________________________________
Firm: ________________________________
Address: ________________________________
Telephone: ________________________________
Email: ________________________________
Practice Continuity Committee
Succession & Retirement Planning for CPA Firms
Ed Mendlowitz, CPA

FRIDAY, OCTOBER 23, 2015, 8 A.M.
ON PARADE DINER
7980 JERICHO TURNPIKE, WOODBURY, NEW YORK 11797
(516) 364-1870

Dear Ginette:

___ I will be attending the breakfast meeting at 8 a.m.
___ Enclosed is my check for $ ___ at $25 per person
   (Must be received by noon, Thursday, October 22)
___ I prefer to pay $ ___ at $30 per person at the door
   (Walk-ins may be limited due to space availability)

Checks are payable to NYSSCPA — Nassau Chapter.

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

Name: ____________________________
Firm: ____________________________
Address: _________________________
Telephone: _______________________
Email: ___________________________
UPCOMING MEETINGS AND EVENTS

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

Tuesday, October 20, 2015

Guest Speakers: Angela Katehis

Location: Berdon LLP
One Jericho Plaza, Jericho, NY 11753

Time: 6:00 p.m. Dinner
6:30 p.m. Presentation

Course Code: To be obtained
CPE Credits: Two

Cost: $20 for Dinner and CPE Presentation

Topics: Debt Issuance Costs
Going Concern
EBP Update
Fair Value

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 issues or circumstances that they have come across in the last few months. Our objective is to provide education and best practice guidance to the attendees, regardless of the size of their firm.

It is OK to bring your check with you to the session.

ACCOUNTING & AUDITING COMMITTEE
NASSAU CHAPTER
Debt Issuance Costs, Going Concern, EBP Update, Fair Value
Tuesday, October 20, 2015

Please RSVP ASAP via email, fax or mail to:
Mark R. Cuccia, CPA
Marks Paneth LLP
88 Froehlich Farm Blvd.
Woodbury, NY 11797
Email: mcuccia@markspaneth.com
Fax: 516-992-5909

☐ I will be attending the Dinner and CPE Presentation.

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

Name: __________________________________________
Firm Affiliation: __________________________________
Address: _______________________________________
Telephone: _________________________________
Fax: __________________________________________
Email Address: _______________________________

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

Tuesday, December 1, 2015

Guest Speakers: George Victor

Location: Marks Paneth LLP
88 Froehlich Farm Blvd., Woodbury, NY 11797

Time: 6:00 p.m. Dinner
6:30 p.m. Presentation

Course Code: To be obtained
CPE Credits: Two

Cost: $20 for Dinner and CPE Presentation

Topics: Accounting and Auditing Update

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 issues or circumstances that they have come across in the last few months. Our objective is to provide education and best practice guidance to the attendees, regardless of the size of their firm.

It is OK to bring your check with you to the session.

ACCOUNTING & AUDITING COMMITTEE
NASSAU CHAPTER
Accounting and Auditing Update
Tuesday, December 1, 2015

Please RSVP ASAP via email, fax or mail to:
Mark R. Cuccia, CPA
Marks Paneth LLP
88 Froehlich Farm Blvd.
Woodbury, NY 11797
Email: mcuccia@markspaneth.com
Fax: 516-992-5909

☐ I will be attending the Dinner and CPE Presentation.

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

Name: __________________________________________
Firm Affiliation: __________________________________
Address: _______________________________________
Telephone: _________________________________
Fax: __________________________________________
Email Address: _______________________________
The NYSSCPA — Nassau Chapter and The Financial Planning Association of Long Island are pleased to announce our

First Annual Financial Fitness Day

FREE ADMISSION AND ALL ARE WELCOME!

Saturday, October 3, 2015
10 A.M. to 2 P.M.

Molloy College
Suffolk Campus at Republic Airport
7180 Grumman Lane
Farmingdale, NY 11735

Have questions about your finances that need professional guidance? Then you should come!
Absolutely NO solicitations will take place

PROGRAM

- Smarter Social Security: How can you help yourself by following these little known rules?

- Initial Steps towards Financial Freedom — Smart financial moves if you are on your own for the first time.

- Debt Management and Budgeting — How to manage your way out of debt and budget for your goals.

- Investing for Beginners

CPAs and CFPs will be available for individual consultations free of charge throughout the event.

Learning Activities for the Children throughout the event!
NYSSCPA — NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE MEETING
OCTOBER 16, 2015

TOPIC: BILLING

• How to Price a Job
• Fixed Fee vs. Retainer Billing
• Review Time Entry
• Value Bill
• How to Bill Individual Tax Returns
• Use of Engagement Letters
• AND MORE!

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

CPE: 2 Credits Pending

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

Place: On Parade Diner
       7980 Jericho Turnpike, Woodbury

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

Checks are payable to:
NYSSCPA — Nassau Chapter

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

WE LOOK FORWARD TO SEEING YOU THERE!

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

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

Please pre-register by calling Jean at 516-938-5219 or you can email her at jtowensend@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.

Name (Print) ______________________________________________________
Firm _____________________________________________________________
Firm Address ______________________________________________________
City __________________________ State ___________ Zip_________________
Telephone _________________________________________________________
Fax ______________________________________________________________
Cell Phone ________________________________________________________
Email ____________________________________________________________
CPA Cert # ________________________________________________________
Signature _________________________________________________________
Date _____________________________________________________________

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

NYSSCPA — NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE MEETING
NOVEMBER 20, 2015

TOPIC: COLLECTIONS

• Procedures in Place
• Collection Letters
• When to Involve an Attorney
• When to Sue
• Credit Cards
• Interest Charges
• Arbitration
• Retainers/Engagement Letters
• When to Stop Work – Pencils Down
• AND MORE!

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

CPE: 2 Credits Pending

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

Place: On Parade Diner
7980 Jericho Turnpike, Woodbury

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

Checks are payable to:
NYSSCPA — Nassau Chapter

Name (Print) ______________________________________________________
Firm _____________________________________________________________
Firm Address ______________________________________________________
City __________________________ State ___________ Zip_________________
Telephone _________________________________________________________
Fax ______________________________________________________________
Cell Phone ________________________________________________________
Email ____________________________________________________________
CPA Cert # ______________________________________________________
Signature _________________________________________________________
Date _____________________________________________________________

WE LOOK FORWARD TO SEEING YOU THERE!

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

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

NYSSCPA — NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE MEETING
NOVEMBER 20, 2015
ON PARADE DINNER
7980 Jericho Turnpike
Woodbury, NY 11797

Please pre-register by calling Jean at 516-938-5219
or you can email her at jtowensend@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.

Name (Print) ______________________________________________________
Firm _____________________________________________________________
Firm Address ______________________________________________________
City __________________________ State ___________ Zip_________________
Telephone _________________________________________________________
Fax ______________________________________________________________
Cell Phone ________________________________________________________
Email ____________________________________________________________
CPA Cert # ______________________________________________________
Signature _________________________________________________________
Date _____________________________________________________________

Please note: Meetings are subject to change.
Notifications will be sent to all registered attendees via email should this occur.
**NYSSCPA – NASSAU CHAPTER**

**Small Firm MAP Meeting Topics 2015-2016***

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Speaker/Moderator</th>
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<tbody>
<tr>
<td>Friday, October 16, 2015</td>
<td>Billing</td>
<td>Scott Sanders, CPA, PFS, CGMA, CFP*, CFS Eliot Lebenhart, CPA Kenneth Hauptman, CPA Alex Resnick, CPA</td>
</tr>
<tr>
<td>Friday, November 20, 2015</td>
<td>Collections</td>
<td>Scott Sanders, CPA, PFS, CGMA, CFP*, CFS Eliot Lebenhart, CPA Kenneth Hauptman, CPA Alex Resnick, CPA</td>
</tr>
<tr>
<td>Friday, December 18, 2015</td>
<td>Expansion of Client Services</td>
<td>Scott Sanders, CPA, PFS, CGMA, CFP*, CFS Eliot Lebenhart, CPA Kenneth Hauptman, CPA Alex Resnick, CPA</td>
</tr>
<tr>
<td>Friday, January 15, 2016</td>
<td>Dress for Success &amp; Healthy Eating</td>
<td>Janine Giorgenti — Giorgenti Custom Menswear Carmela Frattasi — Corporate Wellness</td>
</tr>
<tr>
<td></td>
<td>Part I by NYSSCPA — Nassau Chapter</td>
<td></td>
</tr>
<tr>
<td>Friday, February 19, 2016</td>
<td>Pre-Tax Season Issues — Roundtable Discussion</td>
<td>Scott Sanders, CPA, PFS, CGMA, CFP*, CFS Eliot Lebenhart, CPA Kenneth Hauptman, CPA Alex Resnick, CPA</td>
</tr>
<tr>
<td>March 2015 — No Meeting - Tax Season</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wednesday, April 20, 2016</td>
<td>Post-Tax Season Issues — Roundtable Discussion</td>
<td>Scott Sanders, CPA, PFS, CGMA, CFP*, CFS Eliot Lebenhart, CPA Kenneth Hauptman, CPA Alex Resnick, CPA</td>
</tr>
<tr>
<td>Wednesday, May 18, 2016</td>
<td>10 Ways to Lose a Client</td>
<td>Scott Sanders, CPA, PFS, CGMA, CFP*, CFS Eliot Lebenhart, CPA Kenneth Hauptman, CPA Alex Resnick, CPA</td>
</tr>
<tr>
<td>Wednesday, June 15, 2016</td>
<td>Labor Law Update</td>
<td>Ruth Kraft, Esq., Barlett, McDonough &amp; Monaghan, LLP</td>
</tr>
</tbody>
</table>

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

**Time:** 8 to 10:00 a.m. (breakfast included)

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

**You Can Contact Your Co-Chairmen as Follows:**

<table>
<thead>
<tr>
<th>Scott Sanders, CPA, PFS, CGMA, CFP*, CFS</th>
<th>Eliot Lebenhart, CPA</th>
<th>Kenneth Hauptman, CPA</th>
<th>Alex Resnick, CPA</th>
</tr>
</thead>
<tbody>
<tr>
<td>516 938-5219</td>
<td>516 938-5219</td>
<td>516 364-8888</td>
<td>516 364-8888</td>
</tr>
</tbody>
</table>

All meetings are held on Fridays unless otherwise noted. *Please note: Meeting dates, topics and speakers are subject to change.*
**UPCOMING MEETINGS AND EVENTS**

**A TECHNICAL MEETING SPONSORED BY THE REAL ESTATE COMMITTEE**

---

**REAL ESTATE COMMITTEE EVENT**
**TUESDAY, OCTOBER 27, 2015**

Please RSVP ASAP via email, fax or mail to:
Joel Dressner, CPA
c/o Gettry Marcus CPA, P.C.
88 Froehlich Farm Blvd., 3rd Floor
Woodbury, NY 11797
Tel: (516) 364-3390 ext. 232
Fax: (516) 496-0417
Email: jdressner@gettrymarcus.com

- I will attend dinner and the CPE presentation at 6 p.m. and I have enclosed a check for $________ at $45 per person, payable to the NYSSCPA — Nassau Chapter.

- I will attend the CPE presentation only at 7 p.m. and I have enclosed a check for $________ at $20 per person payable to the NYSSCPA — Nassau Chapter.

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

Name (Print) ______________________________________________________
Firm ______________________________________________________________
Firm Address _______________________________________________________
City __________________________ State ___________ Zip_________________
Telephone _________________________________________________________
Cell Phone _________________________________________________________
Email ____________________________________________________________
Signature _________________________________________________________

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

---

**Alternative Financing for Real Estate Projects - Private Placement of Securities**

**TUESDAY, OCTOBER 27, 2015**

**Speakers:** Russell Stern, Esq., Partner Silverman Acampora, LLP

**Location:** Milleridge Inn
585 Broadway, Jericho, NY 11753

**Designed for:** Professionals involved in real estate engagements.

**Chairpersons:** Vivian Martinez, CPA
Joel C. Dressner, CPA

**Topics:**
- What exactly is an offering of securities?
- Federal and State Securities Laws that will impact the offering.
- What a typical “vanilla” real estate private offering looks like — choice of entity and basic deal structure.
- Issues that are addressed when offering interests in entities.
- What the current real estate private placement marketplace looks like.
- Current legislation, statutory, and marketplace issues on the horizon.

**Course Level:** Basic/Intermediate

**Course Code:** TBD

**CPE Credits:** 2
How to Avoid the Murder of Your Business

WEDNESDAY, NOVEMBER 18, 2015

Speakers: Attorneys:
Erica Garay, Patricia Galteri, James Garbus, Meyer, Suozzi, English & Klein, P.C.
Jack Wilk, Esq.
Wilk Auslander LLP

Location: Milleridge Inn
585 Broadway, Jericho, NY 11753
(516) 931-2201

Designed for: Professionals involved in real estate engagements.

Chairpersons: Vivian Martinez, CPA
Joel C. Dressner, CPA

Topics:
This presentation will discuss critical areas that are essential in keeping your real estate clients in the best of business health.
Join us for a lively and informative evening!

Topics will include:
• Succession planning
• Inheritance issues
• Buy-sell and other agreements
• Using mediation to salvage relationships
• Tax issues and consequences
• Case studies

Course Level: Basic/Intermediate
Course Code: TBD
CPE Credits: 2

REAL ESTATE COMMITTEE EVENT
Wednesday, November 18, 2015
Milleridge Inn
585 Broadway, Jericho, NY 11753

MAIL TO:
Joel Dressner, CPA
c/o Gettry Marcus CPA, P.C.
88 Froehlich Farm Blvd., 3rd Floor
Woodbury, NY 11797
Tel: (516) 364-3390 ext. 232
Fax: (516) 496-0417
Email: jdressner@gettrymarcus.com

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

Name (Print) ______________________________________________________
Firm _____________________________________________________________
Firm Address ______________________________________________________
City __________________________ State ___________ Zip_________________
Telephone _________________________________________________________
Cell Phone _________________________________________________________
Email ____________________________________________________________
Signature _________________________________________________________

To ensure we have adequate seating, please fax back or mail your reservation as soon as possible. Thank you.
THE NASSAU CHAPTER COOPERATION WITH EDUCATIONAL INSTITUTIONS COMMITTEE IS SPONSORING OUR ANNUAL
MENTOR A STUDENT NIGHT

Thursday, November 12, 2015
Location: Chateau Briand, Carle Place
Cocktails: 6:30 p.m.
Dinner & Meeting: 8:00 p.m.
Co-chairs: Michael Katz, CPA
Anthony Basile, CPA
Abby Lucrezia
Registration Fee: $60 per person, payable to
The NYSSCPA — Nassau Chapter

If you wish to pay via credit card, use PayPal link at
https://cpe.nysscpa.org/product/26246 (you do not need a
PayPal account to pay via credit card).

One of the main purposes of the event is to afford
accounting students an opportunity to interact with
practitioners in an informal, friendly atmosphere. Attendees
will have the opportunity to participate in networking
activities with students, as well as with staff and partners of
local CPA firms. By attending, you will be helping to prepare
a future accounting professional, perhaps even a future
employee. In addition, you will be treating yourself to an
enjoyable dinner and networking event.

For details, please contact Co-chairs:
Michael Katz: mkatz@st-cpas.com
Anthony Basile: abasile@basilecpa.com
Abby Lucrezia: abby.lucrezia@janoverllc.com

NOVEMBER CHAPTER MEETING
Registration Coupon
THURSDAY, NOVEMBER 12, 2015
Chateau Briand, Carle Place, NY
6:30 p.m. Cocktails
8:00 p.m. Dinner & Presentation
Michael Katz, CPA, Sanders Thaler Viola & Katz, LLP
350 Jericho Turnpike, Suite 1, Jericho NY 11753
mkatz@st-cpas.com
Phone (516) 938-5219 • Fax (516) 938-0491

Dear Michael:
☐ I will attend dinner and the program at 6:30 p.m. Enclosed
is my check for $_________ at $60 per person, payable to
NYSSCPA — Nassau Chapter.
☐ I paid via PayPal on _____________ (date).

Note: RSVP by November 5, 2015 to guarantee admission.

Name: _______________________________________________
Firm: _______________________________________________
Address: _____________________________________________
Telephone:___________________________________________
Fax: _________________________________________________
Email Address: ________________________________________
UPCOMING MEETINGS AND EVENTS

THE NYSSCPA ATTORNEYS AND ACCOUNTANTS JOINT COMMITTEE INVITE YOU TO AN EVENING OF NETURKEYING

Accountants & Attorneys

NETURKEYING FEUD

Network the NYSSCPA Nassau Chapter

CO-CHAIRS
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kristina.albarella@marcumllp.com
631-414-4624

Jill Scher, CPA, MST
jscher@gettrymarcus.com
516-364-3390 x 144

Anthony Basile, Ph.D., CPA, CVA CFE
abasile@basilecpa.com
516-741-5100 x 11

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 craig.wolman@cohnreznick.com
646-834-4115

NASSAU COUNTY BAR ASSOCIATION

Carlyle at The Palace
1600 Round Swamp Rd, Plainview, NY 11803
TUESDAY, NOVEMBER 24TH 2015
6-9 PM

Enclosed is my check for $__________________________ at $65 per person,
($75 at the door,) payable to “NYSSCPA, Nassau Chapter.”

Name:

Address:

Email:

Firm Affiliation: ___________________________ Phone: ___________________________

Attorney______ Accountant______

*Attendance is limited to Attorneys and Accountants only.
LITIGATION SERVICES COMMITTEE PLANNING AND GENERAL MEETING

WHEN: MONDAY, OCTOBER 19, 2015
TIME: 8:30 A.M.
LOCATION: COHEN GREVE & CO
485 JERICHO TURNPIKE, MINEOLA
CO-CHAIRS: NANNETTE WATTS, CPA/ABV/CFF
PASQUALE RAFANELLI, CPA

Please RSVP to Nannette Watts at nwattscpa@yahoo.com

SAVE THE DATE

JOINT NASSAU/SUFFOLK CHAPTER BANKER/CPA ACCOUNTANT NETWORKING EVENT

WHEN: WEDNESDAY, JANUARY 20, 2016
TIME: 6:00 TO 8:30 P.M.
WHERE: TBD

Additional information and registration form available in the October Newsletter
UPCOMING MEETINGS AND EVENTS

SAVE THE DATE

TOWN HALL MEETING AND ETHICS UPDATE

WHEN:  WEDNESDAY, JANUARY 13, 2016
WHERE:  CHATEAU BRIAND, CARLE PLACE

Managing Partners Meeting - 4:30 p.m.
Cocktail Hour - 5:30 p.m.
Dinner - 6:30 p.m.
CPE Only - 7:00 p.m.

SAVE THE DATE

63RD ANNUAL
ALL DAY TAXATION CONFERENCE
SPONSORED BY THE NYSSCPA NASSAU CHAPTER TAXATION COMMITTEE

WHEN:  SATURDAY, DECEMBER 5, 2015
        OR SUNDAY, DECEMBER 6, 2015
TIME:  9:00 A.M. TO 5:15 P.M.
WHERE:  LONG ISLAND MARRIOT HOTEL
         UNIONDALE, NY
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

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

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

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

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&mostPopular=&trk=tyah&trkinfo=tas%3Anysscpa%20nas

SPONSORSHIP

If you wish to sponsor any Nassau Chapter or committee event, 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

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VOLUME 60 ISSUE 2 22
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) (631) 465-5000
- 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, CGMA, CFP, CMFC (516) 735-4717
- Scott Sanders, CPA, PFS, CGMA, CFP, CFS (516) 938-5219

**Newsletter Committee**
Newsletter produced by
The Public Relations and Marketing Group
www.theprmg.com

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Fuentes & Angel CPAs LLC
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Phone: (516) 622-3045
lynnefuentes@optonline.net

**John Zaher**
The Public Relations and Marketing Group
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Patchogue, NY 11772

**Vivian Levy**
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Jericho, NY 11753
Phone: (516) 938-5219
vivianlevyl@gmail.com

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

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<td>October 10</td>
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<td>December</td>
<td>November 10</td>
</tr>
</tbody>
</table>

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

**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