A Message From The President

We are in the home stretch of tax season and of my presidency as well.

In the past couple of months, we have had many successful and exciting events that I hope all of you enjoyed. These events included the annual CPA Ethics meeting, along with the Managing Partners meeting at the Chateau Briand. On January 29th, we held our joint Nassau/Suffolk Bankers Meeting. With over 125 attendees, it was a great event and presented an opportunity to network with local bankers.

We have a lot of great events in the next couple of weeks. On April 7, the CFO Committee is sponsoring a lecture about Managing the Accounting Department - Staff Development, Supervision & Succession. On April 22, we will have an after-tax-season celebration and update. This free Wine and Cheese Networking Event will be held in conjunction with the Long Island Community Foundation at the Art League of Long Island. It will include 1 CPE credit and a great opportunity to network with colleagues. For more information about all of our events, please go to our website.

I invite all of our members to join me on May 7th, when we install Phil Kanyuk as our next President of the Nassau Chapter at the 62nd Installation Dinner. The dinner will take place at the Crest Hollow Country Club in Woodbury. The Installation Dinner is our Chapter’s flagship event and an opportunity to meet the Board, many past Presidents, and sponsors. Please visit our chapter webpage here to register.

Please be sure to look for detailed information and registration on the Nassau Chapter website for some of our summer events. These events include our annual golf outing and the Ellen Gordon CPAs 4(a): Cause 5K Run/Walk to End Hunger. In May and June, each of our 21 Nassau Chapter committees will hold their organizational meetings and gear up for the new fiscal year. These meetings are crucial, as the chairs select relevant and timely topics, and it is a great way to become involved. Please reach out and join one of our committees and help promote our profession.

Wishing everyone good luck with crunch time and I hope you get to enjoy the weather soon.

Thank you,

Robert S. Barnett, CPA
President
2014
rbarnett.nassauchapter@cbmslaw.com
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<tr>
<td>Tuesday 4/7</td>
<td>Staff Development/Supervision/CFOSuccession Meltzer, Lippe - Mineola 8-10 AM</td>
<td>Thursday, 4/16</td>
<td>Sanders Thaler Viola &amp; Katz - Jericho 8-10 AM</td>
</tr>
<tr>
<td>6:30 - 11PM</td>
<td>Waterloo</td>
<td>© 2015 THE NEW YORK STATE SOCIETY OF CPAS, All Rights Reserved</td>
<td>Wednesday 4/22</td>
</tr>
</tbody>
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<thead>
<tr>
<th>May 2015</th>
<th>Financial Literacy Committee</th>
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<th>Small Firm MAP</th>
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<tbody>
<tr>
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<td>Post-Tax Season Issues-Roundtable Discussion On Parade Diner - Woodbury 8-10 AM</td>
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<td>Practice Continuation For Small Firms - An Action Plan On Parade Diner - Woodbury 8-10 AM</td>
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<td>Thursday 5/14</td>
<td>IBUT 5/12</td>
<td>Saturday, 4/22</td>
<td>Health and Finding Time to Unwind Milleridge Inn, Jericho 12-2:45 PM</td>
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</table>

<table>
<thead>
<tr>
<th>June 2015</th>
<th>CFO &amp; Financial Executives</th>
<th>CHAPTER EVENT</th>
<th>Small Firm MAP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday 6/10</td>
<td>Planning Meeting Meltzer, Lippe - Mineola 8-10 AM</td>
<td>Coop w/Bankers &amp; Credit Grantors Thursday 6/11</td>
<td>The Good, the Bad, and The Ugly of M&amp;A. Practitioner Roundtable/ Point of View from Past Experience of Co-Chairs of M&amp;A. Practitioner Roundtable/ Point of View On Parade Diner - Woodbury 8-10 AM</td>
</tr>
</tbody>
</table>

## Chapter Officials:

- **President**
  - Robert S. Barnett, CPA
- **President-Elect**
  - Philip H. Kanyuk, CPA
- **Vice President**
  - Lynne M. Fuentes, CPA
- **Treasurer**
  - Christine P. Hallahan, CPA
- **Secretary**
  - Anthony Basile, CPA
- **Past President**
  - Scott Sanders, CPA
- **Directors**
  - Alex Resnick, CPA
  - Anthony Aronica, CPA
  - Eliot Lebenchart, CPA
  - Cynthia Szcz, CPA
  - Michael D. Katz, CPA
  - Mark Goldschmitt, CPA
  - Jill Scher, CPA
  - Kristina Albarrella, CPA
- **Accounting & Auditing**
  - Mark Goldschmitt, CPA
  - Mark R. Cuccia, CPA
  - Marcy Greenfield, CPA
- **Audit & Accountants**
  - Kristina Albarrella, CPA
  - Jill Scher, CPA
  - Anthony Basile, CPA
- **CFO & Financial Executives**
  - Manlio Cafiero, CPA
  - Anthony Aronica, CPA
  - Elliot Lebenchart, CPA
  - Charles Kramer, CPA
  - Mark L. Meinberg, CPA
- **Community Event**
  - Nawrocki Smith - Melville 8-10 AM
  - Chapter Event w/Long Island Community Foundation 8-10 AM
  - Small Firm MAP 8-10 AM
  - CFO & Financial Executives 8-10 AM
  - Financial Literacy Committee 8-10 AM
  - Practice Continuity Committee 8-10 AM
  - Women's Focus Group 8-10 AM

## Upcoming Meetings:

- **Community Event**
  - Nawrocki Smith - Melville 8-10 AM
  - Chapter Event w/Long Island Community Foundation 8-10 AM
  - Small Firm MAP 8-10 AM
  - CFO & Financial Executives 8-10 AM
  - Financial Literacy Committee 8-10 AM
  - Practice Continuity Committee 8-10 AM
  - Women's Focus Group 8-10 AM

## Event Highlights:

- **8-10 AM**
  - CFO & Financial Executives 8-10 AM
  - Financial Literacy Committee 8-10 AM
  - Chapter Event w/Long Island Community Foundation 8-10 AM

## Change Form:

- **8-10 AM**
  - CFO & Financial Executives 8-10 AM
  - Financial Literacy Committee 8-10 AM
  - Chapter Event w/Long Island Community Foundation 8-10 AM
The officers and board of the NYSSCPA Nassau Chapter were saddened to hear of the death of Edwin J. Kliegman, CPA on January 21, 2015. Mr. Kliegman, a co-founder of Top 20 firm Marcum LLP, was an active member of the NYSSCPA since joining in 1952 – he joined the Nassau Chapter the following year when it was chartered. Over the years, he participated in or led 17 Society committees, which included developing the Continuity of Practice Program for NYSSCPA, being chair of the Nassau Chapter Small Firm MAP Committee, and most recently, serving on our chapter’s Newsletter Committee. Mr. Kliegman also contributed many articles to The CPA Journal and The Trusted Professional, as well as other publications, and served as the Director of CPE Programs for Accounting Today, a national business newspaper serving the tax and accounting community. He was an active member of the Society right up until his death, and described his time in the organization, particularly as part of the Nassau Chapter, with great enthusiasm: “It was an exciting experience to be the first to be part of a new organization, participate in its growth and [have] the opportunity to meet other practicing CPAs, to learn how and what they were doing to build and develop business and to be able to discuss problems of practice with others in the same situation,” he said.

In 1979, he organized and founded the Nassau/Suffolk Chapter of the NCCPAP and was elected its first president. Under his leadership, he developed a membership of over 500 CPA firms. In 1987, he served as national president of NCCPAP. He was also a founder of ICPA Corp., one of the first independent accounting firms in St. Petersburg, Russia. Mr. Kliegman received the Leon D. Alpern Leadership Award in recognition of his many years of service and guidance to the CPA profession.

Mr. Kliegman was a prolific author, and was also active in his local synagogue and was the first CPA to be elected trustee of the Village of Massapequa Park. He is survived by four children, as well as eight grandchildren, according to a death announcement released by the family. Doris, his wife of 61 years, passed away in 2009.

Ed was an acclaimed & distinguished member of our profession and many of our members remember him with affection and admiration. We extend our deepest condolences to his family. May his memory be for a blessing.
NOMINATING COMMITTEE:
Chair: Elizabeth Haynie, CPA
Mark Stone, CPA
Robert Schaffer, CPA

The Nominating Committee is proud to announce the slate for the 2015-2016 year:

OFFICERS:
PRESIDENT: Philip H. Kanyuk, CPA
PRESIDENT-ELECT: Lynne M. Fuentes, CPA
VICE PRESIDENT: Christine P. Hallahan, CPA
CPA TREASURER: Anthony Basile, CPA
SECRETARY: Alex Resnick, CPA

DIRECTORS:
Jill Scher, CPA, one-year term ending 5/31/16
Kristina Albarella, CPA, one-year term ending 5/31/16
Mark Goldschmitt, CPA, one-year term ending 5/31/16
Cynthia Sze, CPA, one-year term ending 5/31/16
Michael Katz, CPA, one-year term ending 5/31/16
Mark Cuccia, CPA, two-year term ending 5/31/17
Joshua Sector, CPA, two-year term ending 5/31/17
Vivian Martinez, CPA, two-year term ending 5/31/17

THE FOLLOWING ARE AUTOMATICALLY SELECTED:
DIRECTOR (PAST PRESIDENT): Robert Barnett, CPA, Esq.
PRESIDENT: Philip H. Kanyuk, CPA.
Nassau Chapter
Practice Continuity Committee

The Practice Continuity Committee hopes you are all having a successful and prosperous tax season this year. Soon it will be “reflection time” and our committee is here to help you plan for the “after (working) life.” But first, I’d like to recognize the speakers from our last meeting.

On Tuesday, January 13, 2015, our Committee presented what some participants called the best meeting in our Committee’s existence. Guest speaker Hank Sessa, a retirement consultant and planner — along with Larry Lioz, a retired CPA; Michael Gaines, a near retirement CPA; and Robert Goldfarb, a CPA whose firm merged to enhance partner retirements — discussed their different perspectives in planning for retirement. Hank discussed the many near-retirement individuals he’s counseled and the thought process in deciding about the years beyond a working career. He addressed the question, “How many active years do you have left and how do you want to spend them?” Our panel member CPAs gave honest and heartfelt assessments of their careers, family and personal lives, and the sometimes-difficult decisions in retirement planning. We also heard a very upbeat analysis of how one panel speaker spends his free time, now that his working career is done (skiing and go-carting?). This meeting was inspirational and thought-provoking.

Our final meeting for the season is on April 24, 2015. Suzanne Holl of Camico has been published often in the Trusted Professional. She will speak on her article “Practice Continuation for Small Firms - an Action Plan.” She will address the details of Practice Continuation Agreements and will expand on the concepts in her article. She will bring some new ideas on the issue and answer questions on practical applications of the Practice Continuation Agreement concept.

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 April 24 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
The Importance of Financial Literacy for Women

By Nannette Watts, CPA/ABV/CFF for the NYSSCPA Nassau Chapter Financial Literacy Committee

My mother tells me now that she always knew I would grow up to be an accountant. Evidently, at the age of seven, I would take stacks of deposit slips from the bank and fill them out when I got home. In hindsight, she was the one that managed our family finances and, although she might have been unsuccessful at times, I give her a lot of credit for taking on that role when women typically did not. For that reason and because I am the mother of two boys, it wasn't until recently with my increasing involvement with the Financial Literacy Committee that I realized the importance of teaching these skills to young women.

My career has been focused on litigation services and business valuation primarily for divorce cases. In many of my firm's engagements, I meet with the non-titled spouse (typically, the wife) in an effort to gain insight about the parties' household finances. More often than not, there is a perception of having had maintained a certain lifestyle during the marriage, but little or no understanding of the source of funds or assets derived nor the debt incurred to support it all. If asked to summarize their family's financial portfolio, many women I encounter would not know where to begin. While they may offer an unlimited array of reasons (he always handled it, I always had what I needed and didn't want for anything, the business took care of it, etc.), ultimately, these women are often at risk of suddenly finding themselves on their own and blindsided by financial distress. Had they been educated from an early age about money, they could have been more empowered to make solid financial decisions as adults and would have known that is wasn't okay to be uninformed about their family's finances. Regardless of whether they ultimately take on the role of managing their finances, at the very least, they should be well-informed.

Studies have shown that financial abuse is a form of domestic abuse. An abusive spouse or partner may withhold funds, secrete assets or deny spending so the abused individual feels so dependent that they are unable to muster the courage to leave a bad relationship or marriage. They are fearful of being financially independent or forced to handle money on their own, a basic fear of the unknown. These unknowns might have otherwise been avoided or tamed, had these women received more basic financial literacy training earlier in their lives.

As financial professionals, it is important for us to educate our daughters, as well as our sons about money and finances. From the youngest of ages, we can instill the differences between their wants and needs. As they grow older, we should expand our conversations with them to include topics such as saving and spending, using credit cards, interest, investing and even income taxes. Then, as they enter young adulthood, we can discuss the cost of college and the obligations of having student loans, affording their first apartment or securing a car loan. If nothing else, our children should know that they can always come to us with questions and not be intimidated about seeking information or guidance. That alone can be very empowering.

Financial literacy has been defined as “the ability to use knowledge and skills to manage financial resources effectively for a lifetime or financial well-being.” It's not about debits and credits or financial statement reporting requirements. It is about those aspects of money that we as professionals take for granted, because we have been fortunate enough to receive the training to become financially literate.

The mission of the Nassau Chapter's Financial Literacy Committee is to reach out to children in order to guide them on their journey toward financial literacy and fiscal responsibility by exposing them to engaging and instructional materials that will help them understand money and finances at an age-appropriate level. For information about events or opportunities in which the Committee can assist you, please contact Nannette Watts at 631.543.1333.

Nannette Watts, CPA/ABV/CFF is the Director of Financial Appraisal Services, a Division of Nawrocki Smith LLP, located in Melville, New York. She is currently serving on the Financial Literacy Committee and will be assuming her role as co-chair in the coming year.
Women’s Focus Group - Save The Date, Ladies

Our Spring Luncheon and networking event will be held Friday, May 22nd at noon at the Milleridge Inn, Jericho, NY.

Our guest speaker will be Lisa Eugene, RN ANP. Lisa is a Long Island nurse practitioner in the women’s health field who practices at a busy OB/GYN office. She is a best-selling author whose books have made several MUST-READ lists. Her contemporary romance novels feature heroines who are intelligent, sassy, and have a strong sense of self.

She graduated from NYU with a Master’s degree after studying nursing, women’s health, and creative writing and has had successful book signings throughout Long Island. Her books have gained popularity because the subjects she tackles incorporate some aspect of health care, are relatable and entertaining for women. Lisa Eugene’s books can be found on Amazon and Barnes and Noble.

She will be presenting to the Women’s Focus Group on woman health issues, multi-tasking in today’s hectic world, and expectations in the workforce. Further discussions will create a platform to empower women with a focus on relevant and current topics.

Please keep in mind our continued support for Dress for Success, a not-for-profit organization that provides interview suits and other career development programs to low-income women worldwide. Please bring one item of women’s professional clothing/attire (in good condition) with you to the Spring Luncheon and networking event on May 22. It could be a suit, blazer, blouse, dress slacks, shirt, shoes, handbag, accessories and scarves.

How wonderful it would be to donate one item in your closet that you don’t need to a woman who needs it.

Christine Hallahan, CPA, Marks Paneth LLP
Nassau Chapter
INSTALLATION DINNER
Thursday, May 7, 2015 | 6:30 p.m.
Crest Hollow Country Club, Woodbury

Honoring:  
PRESIDENT Philip Kanyuk, CPA  
PRESIDENT-ELECT Lynne Fuentes, CPA  
VICE PRESIDENT Christine Hallahan, CPA  
TREASURER Anthony Basile, CPA  
SECRETARY Alex Resnick, CPA

Sponsorships & Advertising:

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

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

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

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

☐ PROGRAM ADVERTISING
Full page: $1,200 (7.25" x 9.75")
Half page: $700 (7.25" x 4.75")
Quarter page: $400 (3.5" x 4.75")
Eighth page: $225 (3.5" x 2.25")
Business card: $100 (3.38" x 2")
Submit original business card.

PDF or Word document to VivianLevy1@gmail.com

Tickets & Tables:

☐ TABLE OF 10: $950
Number of tables _____

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

TICKET/TABLE RESERVATIONS: To Flo.Federman@nybkw.com no later than Thursday April 30, 2015.
Include names of all guests below.

Names of Attendees:

Name: ____________________________________________
Firm: ____________________________________________
Address: ____________________________________________
City, State, Zip: ____________________________________________
Telephone: ____________________________________________
E-mail: ____________________________________________
Person who Solicited You: _______________________________

BY CHECK payable to NYSSCPA Nassau Chapter, mail to
Flo Federman | Nussbaum Yates Berg Klein & Wolpow, LLP
445 Broadhollow Road, Suite 319, Melville, NY 11747
Phone: (631) 845-5252 | Fax: (631) 845-5279

BY CREDIT CARD via PayPal*: Click HERE
*PayPal link for tickets/tables only.
All sponsors will be billed separately by Vivian Levy.
UPCOMING MEETINGS AND EVENTS

Register today at: www.active.com, search keyword: Island Harvest

14th Annual
Ellen Gordon CPAs 4(a): Cause
5K Run/Walk to End Hunger

Saturday, June 20, 2015
Eisenhower Park, Field #1
East Meadow, NY
(Access from Merrick Ave. entrance only)

Registration Starts
at 7:30 AM
Race Time: 8:30 AM
Race timed by: Start2Finish

Proceeds will benefit:
Island Harvest
A Food Bank for Long Island
www.islandharvest.org

Name ________________________________________________ Sex M □ F □

Age on Race Day __________________ Biirth Date ___________________________

Email __________________________ Phone ___________________________

Address __________________________________________________________

City __________________________ State _____ Zip Code _____________

I know that running a road race is a potentially hazardous activity. I should not enter and run unless I am medically able and properly trained. I agree to abide by any decision of a race official relative to my ability to safely complete the run. I assume all risks associated with running in this event including, but not limited to: falls, contact with other participants, the effects of the weather, including high heat and/or humidity, dehydration, traffic, and the conditions of the road, all such be known and appreciated by me. Having read this waiver and knowing these facts and in consideration of your accepting my entry, I, for myself and anyone entitled to act on my behalf, waive and release the New York State Society of Certified Public Accountants, Island Harvest, the County of Nassau, NCCPAP, FPA of LI, and all sponsors, Race Directors, their agents and volunteers, their representatives and successors from all claims of liabilities of any kind arising out of my participation in this event. I grant permission to all of the foregoing to use any photographs, motion pictures, recordings, and any other record of this event for any legitimate purpose. I acknowledge that entry fees are non-refundable for any reason and that my right to participate in this event (or a rescheduled event if this event is cancelled) is non-transferable. Roller Blades, Baby Joggers, Headphones, and Animals are prohibited from participating in this race.

Applicant Signature __________________________ Date ____________

Parent or Legal Guardian's if applicant is under 18

Register online at Active.com for $20 (kids under 14 are half price)

Enclosed is my registration fee of $30 payable to Island Harvest (kids under 14 are half price)

Enclosed is my additional tax deductible donation of $________ payable to Island Harvest; or visit https://fundraising.active.com/event/2015EllenGordonCPAs4a to set up a fundraising page and goal.

Music
Post-race food & refreshments
Awards:
Top 3 Overall Male
Top 3 Overall Female
Top 3 Finishers in each age category (5 year groups)
Ribbons for all children under 14

Food Sponsor
Panera Bread

Music
Post-race food & refreshments
Awards:
Top 3 Overall Male
Top 3 Overall Female
Top 3 Finishers in each age category (5 year groups)
Ribbons for all children under 14

Food Sponsor
Panera Bread

For more information:
Kenneth Rick or Stacy Keyes
516-542-6300
ken.rick@janoverllc.com

Register online: www.active.com
Chartered 1953
NASSAU CHAPTER
www.nysscpa.org
For more information: www.islandharvest.org
The CFO & Financial Executives Committee welcomes CPAs in the industry to participate in our monthly meetings. The CFO Committee offers members a monthly, interactive learning experience guided by experienced 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. Monthly educational 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>Apr. 7, 2015</td>
<td>Staff Development, Supervision &amp; Succession</td>
<td>Mineola</td>
</tr>
<tr>
<td>May 14, 2015</td>
<td>Alternate Compensation Strategies</td>
<td>Mineola</td>
</tr>
</tbody>
</table>

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

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

MEETING LOCATIONS:
Mineola: Meltzer, Lippe, Goldstein & Breitstone, 190 Willis Ave., Mineola, NY 11501
Melville: Joint meeting with Suffolk Chapter (Nov. 2014 & Feb. 2015)

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

Please RSVP:
Email this form to: aaronica@graphicpaper.com
Or fax this form to: 631-439-8822
Wine & Cheese Networking Event

Join the NYSSCPA- Nassau Chapter and the Long Island Community Foundation for an Evening of Networking at The Art League of Long Island

Wednesday, April 22, 2015

107 East Deer Park Road, Dix Hills, NY 11746

6 p.m.: Reception, Networking, & a Guided Tour of the Art League!

7 p.m.: CPE/CLE Presentation – 1 Credit

Charitable Contributions- Tax Considerations

Followed by networking until 9:00 p.m.

R.S.V.P. to Eliana Pollack
Capell Barnett Matalon & Schoenfeld LLP
100 Jericho Quadrangle, Ste. 233
Jericho, NY 11753
Fax 516-931-8101 or epollack@cbmslaw.com

Name ________________________________ Firm ________________________________
Address _________________________________________________________________
Telephone ______________________________ Email _______________________________
I am an: Accountant ________ Attorney ________

In Cooperation With:
— Capell Barnett Matalon & Schoenfeld LLP • Giorgenti New York • Jackson National Life • JPMorgan Chase • Long Island Community Foundation • National Life Group • NYSSCPA- Nassau Chapter • Saratoga Capital Management • United Mortgage Corp.
SAVE THE DATE!

The NYSSCPA, Nassau Chapter
Women’s Focus Group
will be hosting our Annual Spring Luncheon

PLEASE JOIN US FOR AN EMPOWERING
AFTERNOON OF NETWORKING

FRIDAY MAY 22, 2015

“HEALTH & FINDING THE TIME TO UNWIND”

Guest Speaker, Lisa Eugene, RN ANP, is a Long Island Nurse Practitioner in the women’s health field. She is a best-selling author whose books have made several MUST-READ lists. Her contemporary romance novels feature heroines who are intelligent, sassy, and have a strong sense of self. She will be presenting to the Women’s Focus Group on women’s health issues, multi-tasking in today’s hectic world, and expectations in the workforce. Further discussions will create a platform to empower women with a focus on relevant and current topics.

Co-Chairs: Christine Hallahan, CPA  
             Lisa Haynie, CPA
             Geri Gregor, CPA  
             Elizabeth Oberg, CPA, CFE

Location: The Milleridge Inn, Jericho, NY

Agenda: 12:00 – 12:30 PM – Networking  
         12:30 – 2:30 PM – Lisa Eugene, RN ANP

Cost: $45 per person  
      Please make check payable to “NYSSCPA, Nassau Chapter”

Kindly email, fax, or mail your response to:  
Elizabeth Oberg, CPA, CFE  
Sanders Thaler Viola & Katz, LLP  
350 Jericho Tpke, Ste 1, Jericho, NY 11753  
e-mail: loberg@st-cpas.com • phone: 516-938-5219 • fax: 516-938-0491

_____ I will attend the luncheon & enclosed is my payment of $45

_____ I am unable to attend but I am interested in becoming more involved within the NYSSCPA Nassau Chapter

Name: ___________________________________________ Firm: ___________________________________________
E-Mail: ___________________________________________ Phone: ________________________________________

The NYSSCPA Women’s Focus Group is supporting Dress for Success, a not-for-profit organization that provides interview suits and other career development programs to low-income women worldwide. We would appreciate your participation.

Please bring one item of woman’s professional clothing/attire (in good condition) with you to our meeting.

It could be a suit, blazer, blouse, dress slacks, shirt, shoes, handbag, accessories and scarves.

How wonderful it would be to donate one item in your closet to a woman in need!
Financial Literacy Committee
Upcoming Meetings

UPCOMING MEETINGS
CALLING ALL MEMBERS

DATES:
APRIL 16, MAY 14

BREAKFAST MEETING:
8:00 a.m. - 10:00 a.m.

APRIL 16TH
SANDERS THALER VIOLA & KATZ LLP
350 Jericho Turnpike, Suite 1
Jericho, NY 11753

Please RSVP to Liz Oberg:
LOberg@st-cpas.com

MAY 14TH
NAWROCKI SMITH LLP
290 Broadhollow Road, Suite 115
Melville, NY 11747

Please RSVP to Nannette Watts:
nwatts@nsllpcpa.com

All other meetings - TBD

Practice Continuity Committee

PRACTICE CONTINUATION FOR SMALL FIRMS - AN ACTION PLAN
Presented by Suzanne Holl of Camico

FRIDAY, APRIL 24, 2015
8AM
ON PARADE DINER
7980 Jericho Turnpike
Woodbury, NY 11797
Phone: (516) 364-1870

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

Dear Ginette:

☐ I will be attending the breakfast meeting at 8:00 AM.
☐ Enclosed is my check for $ ____ at $25.00 per person
   (must be received by noon, Thursday, April 23) or
☐ I prefer to pay $ ____ at $30.00 per person at the door.
   (Walk-ins may be limited due to space availability).

Checks are payable to NYSSCPA, Nassau Chapter.

Name (Print) ______________________________________________________
Firm Affiliation ____________________________________________________
Firm Address ______________________________________________________
City __________________________ State ___________ Zip_________________
Telephone _________________________________________________________
Email ____________________________________________________________
## Small Firm MAP Meeting Topics 2015*

**EFFECTIVE JULY 1, 2014**

**WEDNESDAY, APRIL 22, 2015**

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<tr>
<th>Topic</th>
<th>Sponsor</th>
<th>Speaker/Moderator</th>
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<tr>
<td>Post-Tax Season Issues - Roundtable Discussion</td>
<td>Giorgenti Custom Menswear</td>
<td>Scott Sanders, CPA, PFS, CGMA, CFP*, CFS</td>
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**WEDNESDAY, MAY 13, 2015**

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**WEDNESDAY, JUNE 17, 2015**

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<td>The Good, the Bad and the Ugly of M&amp;A Practitioner Roundtable/Point of View from Past Experiences of Co-Chairs</td>
<td>Giorgenti Custom Menswear</td>
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<td>Alex Resnick, CPA</td>
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All meetings will be held at On Parade Diner, 7980 Jericho Turnpike, Woodbury, NY 11797

**Time:** 8:00 - 10:00 am (breakfast included)

**Paid in Advance:** $25.00 **Cost at the Door:** $30.00 (Note new fee at door)

**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>
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<td>516 364-8888</td>
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*Please note: Meeting dates, topics and speakers are subject to change. **Speaker(s) TBD

All meetings are held on Fridays unless otherwise noted.
UPCOMING MEETINGS AND EVENTS

NYSSCPA – NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE

This meeting is sponsored by:

GIORGENTI
Custom Menswear

NYSSCPA – NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE MEETING
APRIL 22, 2015

TOPIC: POST-TAX SEASON ISSUES –
ROUNDTABLE DISCUSSION

- What Did You Do Better or Worse This Tax Season
- What Changes Are You Already Thinking About
- Different Problems Than the Past
- New Issues This Season
- How did Your 3115 Filings Go
- Have Any E-file Issues
- Post-Season Staffing
- Are You Going to do Another
- AND MORE!

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

CPE: 2 Credits Pending

Time: 8:00–10:00 am – Breakfast (Be prompt!)

Place: On Parade Diner
7980 Jericho Turnpike, Woodbury

Cost:* $25 per person pre-paid only
$30 per person at the door
Checks are Payable to:
NYSSCPA – Nassau Chapter

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

WE LOOK FORWARD TO SEEING YOU THERE!

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

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

NYSSCPA – NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE

APRIL 22, 2015
ON PARADE DINER
7980 Jericho Turnpike
Woodbury, NY 11797

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

*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.
NYSSCPA – NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE MEETING
MAY 13, 2015

TOPIC: LONG RANGE PLANNING FOR YOUR PRACTICE – A PANEL DISCUSSION
GROWTH → RETIREMENT → BUSINESS SUCCESSION

• Choose the Direction You Want to go, Establish Goals & Objectives
• Once Chosen, do You Want to Upgrade Your Infrastructure?
• Preparation of a Realistic Budget & Insure Proper Financing is in Place
• Do You Want to Add Niche Services to Your Practice?
• Examine Your Practice to Make Sure This is What You Want to do Until Retirement
• AND MORE!

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

CPE: 2 Credits Pending

Time: 8:00–10:00 am – Breakfast (Be prompt!)
Place: On Parade Diner
7980 Jericho Turnpike, Woodbury

Cost:* $25 per person pre-paid only
$30 per person at the door
Checks are Payable to:
NYSSCPA - Nassau Chapter

Chairpersons: Scott Sanders, CPA, PFS, CGMA, CFP®, CFS
Eliot Lebenhart, CPA
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Notifications will be sent to all registered attendees via email should this occur.
A TECHNICAL MEETING SPONSORED BY
THE TAXATION COMMITTEE &
THE ESTATE & PERSONAL FINANCIAL PLANNING COMMITTEE

MAY 12, 2015 • 8 AM
Mio Posto
600 Old Country Road
Hicksville, NY
8-8:30 Breakfast
8:30-10:15 Presentations

FOREIGN REPORTING UPDATE
- Albert Dumaual, Esq.
  Capell Barnett Matalon & Schoenfeld LLP
- Filing FBARs due June 30th
- Form 8938
- Offshore Voluntary Disclosure Program
- Streamlined Filing Compliance Procedures

TAX SEASON ROUNDTABLE
- Tax season issues for estates and trusts
- Tangible property regulations
- Health care
- Other tax season issues

Course Code: TBA
CPE Credits: 2
Cost: $10.00

Committee Chairpersons:
Robert Schaffer
Robert Barnett
Iola Damante
Christine Hallahan
Scott Sanders
Eric Kramer
Stuart Shapiro

Please email Iola Damante at: idamante@rem-co.com
if you will be attending.
Thursday, June 11, 2015
RAIN OR SHINE
North Hills Country Club
Manhasset, New York
10:30am Registration
12pm Shotgun
5:30pm Cocktail/Buffet Dinner including Raffle Prize Drawing

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

RSVP By May 28, 2015
The RSVP registration form is on the following page.
Reservations are on a first-come, first-serve basis with receipt of payment.

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

Caddie fee of $120 per foursome is NOT included in the price of golf.

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

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

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

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

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

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

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

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

We will also be accepting items for giveaways at registration, such as golf balls, tees, divot tools, towels, etc.
REGISTRATION FORM:
Please make all checks payable to:
NYSSCPA – NASSAU CHAPTER

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

☐ Foursome $1,600 includes free tee sponsorship
☐ Individual golfer $425
☐ Dinner $175 per person

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

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

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

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

Telephone: _________________________________
Contact Person: _____________________________
Email Address: _____________________________

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

VIA Long Island Expressway:

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

By Auto from Eastern Long Island:
LIE West to Searingtown Road (Exit 36). Proceed westbound on Service Road, pass Searingtown Road and Shelter Rock Road. Continue approximately ½ mile. Entrance to clubhouse is on the right side.
In business since 1994, ACE Payroll assists thousands of companies nationwide with all their payroll, time and attendance, and HR needs. ACE offers:

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- Human Resource Services
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Connect With Us On LinkedIn
http://www.linkedin.com/groups?gid=5010322&most-Popular=&trk=tyah&trkInfo=tas%3Anysscpa%20nas
THE 2015 ALL-DAY ESTATE & PERSONAL FINANCIAL PLANNING CONFERENCE

The annual Estate & Personal Financial Planning Conference was held on January 17, 2015 at the Marriott in Uniondale, NY.

Registration and breakfast were followed with opening remarks and moderation from Christine Hallahan of Marks Paneth LLP, with acknowledgement and thanks to all who contributed their time and efforts in organizing the conference, as well as, reminders of the many upcoming events that the NYSSCPA-Nassau Chapter has to offer.

The presenters included attorneys and CPAs, who are frequent lecturers and have a plethora of knowledge in their fields. They are the top leaders in their industries and communities and all share a common passion: educating others.

Topics of discussion included an “Elder Law and Medicare Update” by Lawrence Davidow, managing partner at Davidow, Davidow Siegel & Stern, LLP; an “Estate Planning Update” presented by Neil Katz, managing partner at Katz Bernstein & Katz LLP; “Irrevocable & Dynasty Trusts,” presented by Co-Chair Eric Kramer, partner at Farrell Fritz, PC; and “Premium Financing for Life Insurance and Specialized Maximum Funded Whole Life Contracts as an Interest Rate Hedge,” by Barry Liebowitz, partner at Arnone, Lowth, Wilson and Liebowitz.

Following lunch, Joseph La Ferlita and Eric Penzer, both partners at Farrell Fritz, PC, discussed “Post-Mortem Planning and Estate Litigation.”

Christopher Wright, CPA an attorney at Marks Paneth LLP, presented on the topic of “Estate and Wealth Planning for Same –Sex Couples after the Windsor Case.”

The conference concluded with a panel of four with an outstanding, interactive exchange of Q & A among participants and panelists Chris Wright, Eric Penzer, Joe LaFerlita and Eric Kramer.

Each of our presenters gave pros and cons, provided case studies, cutting-edge techniques and many points of value to offer our clients.

A tremendous thank you goes to the presenters who were excellent and so giving of their time to educate conference participants, to contributing sponsors, APS Pension & Financial Services, Inc. and Ace Payroll for your continued support of the NYSSCPA’s Nassau chapter, and to Co-Chairs Eric Kramer, Scott Sanders and Stuart Shapiro for your guidance. Thank you, Lynne Fuentes, Nassau chapter Vice President, for all of your support and to our conference liaisons, Lelia Dickenson and Helen Marder, for the added touch you provide in monitoring and making the NYSSCPA conferences so successful.

Christine Hallahan, CPA
Marks Paneth LLP, NYC
EVENT HIGHLIGHTS

THE 2015 ALL-DAY ESTATE & PERSONAL FINANCIAL PLANNING CONFERENCE (Continued)

Barry Liebowitz, CLU, ChFC, Arone Lown, Wilson, Liebowitz Andriano & Greco

Christine Hallahan, CPA, Marks Paneth LLP
addressing participants with upcoming chapter events

Christopher Wright, CPA, Esq., Marks Paneth LLP

Eric Penzer, Esq., Farrell Fritz, PC

APS Pension, Contributing Sponsor

Eric Kramer, CPA, Esq., Farrell Fritz PC

Conference Attendees

Conference Attendees
PRACTICE CONTINUITY MEETING

Photos from the meeting held on Tuesday, January 13, at On Parade Diner. According to some of the attendees, it was called “the best meeting in our committee’s existence.”

Hank Sessa addresses our group.

Participants listen attentively.

Hank Sessa, with speakers Larry Lioz, Craig Morris, Michael Gaines and Robert Goldfarb in the background.

Speakers Larry Lioz, Craig Morris, Michael Gaines and Robert Goldfarb.

Participants enjoy breakfast during the presentation.
The NYSSCPA Nassau Chapter held its 2nd annual Thank You Dinner on January 8th at Frank’s Steaks in Jericho to thank the officers and committee chairs for their hard work this year. A good time was had by all who attended.

From left to right: Kristina Albarella, Lisa Haynie, Robert Barnett, Kathleen Becker, Jill Scher

From left to right: Mark Goldschmitt, Stuart Shapiro, Lynne Fuentes, Christine Hallahan, Alex Resnick

From left to right: Scott Sanders, Vivian Levy, Karen Tenenbaum, Anthony Basile, Michael Katz

From left to right: Joel Dressner, Ken Rick, Phil Kanyuk, Anthony Aaronica
ANNUAL NYSSCPA NASSAU CHAPTER
WOMEN’S FOCUS GROUP FALL LUNCHEON

The annual NYSSCPA-Nassau Chapter Women’s Focus Group Fall Luncheon was held on November 17th, 2014 at the Inn at New Hyde Park, NY.

We opened with networking followed by lunch, raffle prizes and an enlightening seminar entitled “Write Better, Right Now,” by Exec/Comm.

Our guest speakers, Sean Romanoff and Tanya Morgenthaler, provided interactive exercises and guidelines to choosing words, organizing, style and formatting of emails by eliminating “zero” words and “nounisms,” using dynamic verbs, and omitting trite expressions. The seminar was terrific and received rave reviews. The participants walked away with valuable tools to enhance their writing skills.

Thank you to Co-Chairs Lisa Haynie, Geri Gregor, and Liz Oberg for your contributions to making a successful event and a special thanks to Sheryl Rubenbauer for all of your help on November 7th!

I look forward to seeing you all on May 22nd!

Christine Hallahan, CPA, Marks Paneth LLP
ANNUAL NYSSCPA NASSAU CHAPTER
WOMEN’S FOCUS GROUP FALL LUNCHEON (Continued)
EVENT HIGHLIGHTS

ACCOUNTANTS AND BOY SCOUTS WORK TOGETHER TO TEACH CHILDREN ABOUT MONEY

By Sheryl Katz of Tenenbaum Law, PC

On January 23, local children participated in a hands-on, educational event hosted by the New York State Society of Certified Public Accountants (NYSSCPA), Nassau Chapter, Financial Literacy Committee and Seaford Boy Scout Packs 581 and 239, and Troop 581. Kids moved from table to table, taking part in activities encouraging monetary awareness. This is the second Cub Scout Pack Night we have presented to; the first one was in November of 2014 to Cub Scout Pack 690 in Wantagh.

“It is extremely important to educate children about money management as early as possible,” said Karen Tenenbaum, Financial Literacy Committee chair of NYSSCPA-Nassau, and founder of Tenenbaum Law, P.C. “Children should learn about saving and the differences between wants and needs.”

The mission of the Financial Literacy Committee is to reach out to children in order to guide them on their journey toward financial literacy and fiscal responsibility. The committee exposes kids to engaging and instructional materials which help them understand money and finances at an age-appropriate level.
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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☐ Cooperation with Bankers & Credit Grantors
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☐ Estate & Personal Financial Planning
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Name: _________________________________________________
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Please forward your response to:
Lynne Fuentes, CPA
307 Hicksville Road, Bethpage, NY 11714
LynneFuentes@optonline.net | Tel: 516-622-3045

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SPONSORSHIP

If you wish to sponsor any Nassau chapter or committee event, please download our sponsorship packet at

**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) 487-1494
- 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. (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, 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
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**Lynne M. Fuentes, CPA**
307-10 Hicksville Rd.
Bethpage, NY 11714

**John Zaher**
The Public Relations and Marketing Group
156 North Ocean Avenue
Patchogue, NY 11772

**Vivian Levy**
NYSSCPA - Nassau Chapter
c/o Sanders Thaler Viola & Katz LLP
350 Jericho Turnpike, Suite 1
Jericho, NY 11753
vivianlevyl@gmail.com

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**Nassau Chapter Newsletter Deadlines**
All submissions are due three weeks prior to issue date.

**Newsletter Issue**
- May
- September
- October
- November
- December

**Due Date**
- April 10th
- August 10th
- September 10th
- October 10th
- November 10th

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

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**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