You make a living by what you get. You make a life by what you give. – Winston Churchill

Hey, Fellow CPAs...Let’s Get Involved!

We don’t mean to break your hearts, but this is the last newsletter of the season, which means, sadly, that we won’t be back until September 2019. Until then, please enjoy your summer to the fullest.

However, as you’re whiling away some lazy days at the beach, there are avenues of excitement to be explored right here, at the NYSSCPA. As many of you know, or maybe you don’t, our Society has a diverse range of opportunities available for members to give back to the profession that gives us all so much, all while networking with potential new best friends and acquiring leads on great business opportunities. To find out just what those opportunities are, you can check out our info-laden website for events, meetings, etc. that come up throughout the year at https://www.nysscpa.org/membership/chapters/nassau.

And those opportunities are fantastic for you as well as the Society. In addition to career building and networking, the NYSSCPA offers you the opportunity to stay current on issues, standards and regulations associated with the accounting profession. But it also offers you a chance to become involved.

We have more than 60 committees you can join, between our Nassau and State organizations, that would allow you to:
- Exchange ideas with the top people in your field or area of practice in a low-key setting.
- Gain an edge on the latest developments important to you.
- Develop technical, management and presentation skills.
- Become immersed in regulatory and legislative advocacy for your profession.
- Network with experts and potential leads.
- Earn free CPE at select meetings.

But perhaps the greatest benefits for you are the committees you can involve yourself in...

OUR NASSAU CHAPTER offers the following COMMITTEES:

- Accounting & Auditing
- Attorneys & Accountants
- CFO & Financial Executives
- Cooperation with Educational Institutions
- Employee Benefits
- Estate & Personal Financial Planning
- Financial Literacy
- Litigation & Forensic Services
- Management of Accounting Practices
- Membership
- Networking with Accountants
- Newsletter
- NextGen Committee
- NextGen Campus Liaisons
- Practice Continuity & Succession Planning
- Real Estate Committee
- Small-Practice Unit MAP
- Sponsorship Committee
- Taxation Committee
- Technology Committee
- Women’s Focus Group

There are quite a few more committees available than listed here, so if you don’t see one that strikes your fancy, simply check out https://www.nysscpa.org/membership/committees, or to apply, visit the committee application page. And your options abound when it comes to attendance. You can just sit in on a few meetings, or go full throttle and offer to Chair the committee of your choice, where you’ll acquire leadership and organizational skills that will benefit your business in whichever area of accounting you pursue.

Once again, enjoy the sun and surf of the summer, but when you tire of too many scorching hot days in the sunshine, take a little time to offer your services to the Society that benefits us all, the NYSSCPA. That way, you can enjoy the beautiful weather, give back to the Society and your fellow members AND make some connections that will be long lasting and serve you well for years to come. We’ll see you soon, when the leaves begin to fall.

Wishing a safe and exciting summer to all.
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Save the Dates:

JUNE 2019

Small-Firm MAP
Date (originally 6/12) being rescheduled. Date to be announced.
Residency Audits and Issues
On Parade Diner, Woodbury
8:00 – 10:00 AM

CFO & Financial Executive Committee
Thursday, 6/13
Lessons Learned from Tax Reform
Deloitte, Jericho
8:00 – 9:00 AM

Financial Literacy Committee
Tuesday, 6/18
Tax Lessons Learned
Sweet Hollow Diner, Melville
8:00 AM

JULY 2019

18th Annual Ellen Gordon CPAs 4(a) Cause 5K Run/Walk
Thursday, 7/11
Eisenhower Park, Fields 1 & 2
East Meadow, NY
Registration Starts 4:30 PM / Race 7:00 PM

Practice Continuity Committee
Friday, 7/26
Organizational Meeting
On Parade Diner, Woodbury
8:00 AM

2019–2020 Chapter Officials:

PRESIDENT
Natalie Verbanac, CPA

VICE PRESIDENT
Vivian Martinez, CPA

TREASURER
Mark R. Cuccia, CPA

SECRETARY
Kristina Albarella, CPA

DIRECTOR
(PAST PRESIDENT)
Alex Resnick, CPA

DIRECTORS
Jean David Chery, CPA
Tina M. Fasano, CPA
Kenneth Hauptman, CPA
Michael D. Katz, CPA
Craig Morris, CPA
Elizabeth M. Oberg, CPA
Alyssa Popov, CPA
Kenneth Rick, CPA

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

ATTORNEY & ACCOUNTANTS
Kristina Albarella, CPA
Iola Damante, CPA

CFO & FINANCIAL EXECUTIVES
Miles Doherty, CPA
Joanne Krush

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

ATTORNEY & ACCOUNTANTS
Kristina Albarella, CPA
Iola Damante, CPA

CFO & FINANCIAL EXECUTIVES
Miles Doherty, CPA
Joanne Krush

COOPERATION WITH EDUCATIONAL INSTITUTIONS
Michael D. Katz, CPA

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

FINANCIAL LITERACY
Lawrence M. Just, CPA

LITIGATION & FORENSIC SERVICES
Pasquale Rafanelli, CPA

MANAGEMENT OF ACCOUNTING PRACTICES
Louis Grassi, CPA

MEMBERSHIP
Scott Sanders, CPA

NETWORKING WITH ACCOUNTANTS
Neal Korenberg, CPA

NEWSLETTER
 Lynne M. Fuentes, CPA
Natalie Verbanac, CPA

NEXTGEN
Jean David Chery, CPA
Alyssa Popov, CPA
Garrick Turano, CPA
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NEXTGEN LIASON
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TAXATION
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Robert J. Schaffer, CPA

WOMEN’S FOCUS GROUP
Geri A. Gregor, CPA
Lisa Haynie, CPA
Elizabeth M. Oberg, CPA
Natalie Verbanac, CPA
Member, are you interested in being interviewed for the newsletter?
Reach out to Vivian Levy at vivianlevy1@gmail.com.

Looking for a few good volunteers....

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

We are looking for people to chair our Community Affairs and Public Relations Committee. That committee has spearheaded the annual Ellen Gordon Walk/Run, blood drives, etc.

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

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

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

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

Lisa Haynie

According to The Champ, the one and only Muhammad Ali, “Service to others is the rent you pay for your room here on Earth.” Lisa Haynie, CPA, Tax Specialist, NYSSCPA member since 1990 and former President of the organization’s Nassau Chapter (only the second woman to hold the post), knows this axiom all too well. She realizes that her dedication to her profession is truly all about giving back. “I think we all have a duty to give back, not only to the community but to the younger members of the profession and to encourage them to not just go to the committee activities but to encourage others to embrace the accounting profession and make a difference in society. By becoming an officer of NYSSCPA,” continues Lisa, “it shows that you care about where our profession is going today and about the future. My point is, it’s not just about passing the exam...our profession is about how we contribute to society and make a difference.”

It’s because of this dedication to the field of accounting that Lisa has won the prestigious NYSSCPA Distinguished Service Award. This honor recognizes “CPAs who have distinguished themselves as Society leaders and have given outstanding service to the Society and the profession through dedicated service, publications, public service and other activities.” Lisa received this award May 30 at the Crest Hollow Country Club, at the Nassau Chapter’s 66th Annual Installation Dinner.

Lisa is thrilled to have received the award. “I am truly honored to receive this year’s NYSSCPA Nassau Chapter Distinguished Service Award. To me, this is really an award for the entire Nassau Chapter being recognized as a strong organization within our profession. The tireless efforts of countless individuals who give their time for the benefit of others is what really distinguishes our Chapter.”

She recounts, “I have been a member of the NYSSCPA since 1990 and am proud to have contributed to making the Nassau Chapter into what it stands for today: keeping our members current on the latest accounting and tax laws through our seminars featuring outstanding and experienced speakers, recruiting young CPAs to become active members of the NYSSCPA Nassau Chapter, and encouraging them to gain the knowledge and professional growth in being a member of everything this great organization has to offer; showing them what can be achieved by becoming an officer of the Chapter.”

Way back when, Lisa was inspired to pursue accounting full-time while attending Fordham University. There, she had a dynamic teacher, Professor Hochman, who truly took it upon himself to help those in his classes who showed an aptitude for accounting. “I took his...
Intro to Accounting class and loved it, but was walking out of class one day after sadly finding out that I didn’t get into his second-year class, since he was so popular. But he stopped me before I left and asked, ‘Did you sign up for my 102 class?’ I said, ‘I did but didn’t get into yours.’ He said, ‘No, you’re in, you’re going to be in my class.”

“That moment changed my life. And now that I’m on the other side, having been a professor at Hofstra and SUNY Old Westbury, I think about that moment, how it affected me, and try to make a difference to the students I teach. I try and encourage the ones who have an aptitude, helping them to move on and continue in the field.”

“Teaching the Intro to Accounting class, some students actually said that they changed their major because of it. It affected me deeply to know that I had an influence on what people did with their lives or changed their direction because of me. To have that experience, for me to be able to change their lives was very rewarding for me.”

In that same spirit, Lisa has given back in many ways to the Society. From 2012–2013, she served as the Nassau Chapter’s President and was very proud to hold the trust of her fellow CPAs. “The fact that they trusted me enough to represent the Nassau Chapter was an incredible experience for me and to lead them in a way that advanced our Chapter so much was so rewarding. We were inclined to gain more visibility; we wanted to initiate some changes. One being that we would have a strong presence at the State level, as well as in Nassau. That was something that we were looking to focus on—not just worrying about our Chapter, but at the State level, too.”

She also helped to initiate the first Women’s Focus Group, starting the group back in the early aughts. “In my opinion, the goal of the Women’s Focus Group is to provide opportunities for all professional women from various age groups to meet and share their experiences as they advance their careers. It’s important for younger professional women to have a chance to speak to other professional women so that they can learn about skills they may need to enhance to achieve their goals.”

“We had wonderful networking and educational events but I thought something was missing, so we approached Bob Schaffer (who was the Nassau Chapter President at that time) for his help, so that women could mentor other women and create a more comfortable setting for women to flourish. There were 80 or 90 women that began to gather at different venues and we had wonderful events, which we still host today. And I’m proud of the fact that we are the only NYS Chapter that has a Women’s Focus Group, although the current President of the NYSSCPA, Jan Herringer, heads up a Women’s Leadership Forum that is present on a State level.”
Lisa’s assistance to others doesn’t stop with this group. She is also on the Executive Board of the COAP Committee (Career Opportunities in the Accounting Profession), which helps juniors in high school focus on their career paths, with an emphasis on opportunities in accounting. In the past, a five-day event was held at Hofstra, it’s now at Adelphi, and the goal of the event is to bring minority high school students who perhaps wouldn’t have thought about accounting as a choice, to listen to experts in the profession so that they can make the choice to go to college and choose a career path that’s right for them. “We do teach them about accounting, but focus on putting them on the right path to attending college.” “We take them on different field trips to see the inside of public accounting firms, non-public firms, and this year, even to a Mets game. We want to show them different opportunities that accounting will bring them, whether they go on to public or non-profit firms.”

Lisa Haynie has been involved in many aspects of the Society. She sat as Chair on the Estate Planning Committee and the High School Recruitment Committee. She has currently served on the COAP Executive Board for the last 10 years.

Going forward, Lisa Haynie will continue to volunteer her valuable time with the Nassau Chapter of the NYSSCPA. “I feel that it is part of my life so I don’t feel like I’m going to give up volunteering anytime soon. I feel very strongly about it and want to continue to participate, making sure our goals are met. Younger members can always ask me what happened ‘way back when’ and I enjoy being a resource to help the current Chapter be the best it can be.”
Installation Dinner Update

As this newsletter was going to press, the NYSSCPA Nassau Chapter 66th Installation Dinner was in full swing. We will have pictures of the event in our September newsletter, but want to take this opportunity to thank our sponsors for their generosity—our chapter could not accomplish all that we do without your support!

EVENT SPONSORS:

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NYSSCPA — NASSAU CHAPTER
SMALL-FIRM MAP COMMITTEE MEETING

Wednesday, June 12, 2019
8:00 - 10:00 AM

Meeting To Be Rescheduled.
New date to be announced.

Residency Audits and Issues

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

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

Cost:

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

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

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

I am enclosing a check for $_______, payable to NYSSCPA Nassau Chapter

□ I will be using my credit memo, which I will bring with me to the meeting.

Name (print):
Firm:
Address:

Telephone:
Facsimile:
Cell:
Email:
CPA Cert #

Signature
Date

*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.

WE LOOK FORWARD TO SEEING YOU THERE!

Your co-chairpersons:
Eliot Lebenhart, CPA
Ken Hauptman, CPA
Alex Resnick, CPA
CFO & Financial Executive Committee

Lessons Learned from Tax Reform

SPEAKER: Russell Goldstein – Deloitte & Touche LLP

DATE: Thursday, June 13, 2019

TIME:  8:00 - 9:00 AM
LOCATION:  Deloitte & Touche
2 Jericho Turnpike, Jericho, NY  11753

COST:  FREE

CPE:  1 Credit

Course Code:  29036002

Please register online at:
https://cpe.nysscpa.org/product/30548
Financial Literacy Committee

Tax Lessons Learned
Speaker: Neil Katz, Esq.

Tuesday, June 18, 2019
8:00 – 10:00 AM

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

COST: FREE

CPE: 1 Credit | Course Code: TBD

Please call Larry Just (631) 428-4829 to RSVP
18th Annual
Ellen Gordon CPAs 4(a): Cause 5K Run/Walk to End Hunger

Thursday, July 11, 2019
Eisenhower Park, Fields 1 & 2 • East Meadow, NY (Access from Merrick Ave. entrance only)
Registration Starts at 4:30 pm • Race Time: 7 pm

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

Please indicate the level of sponsorship:

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

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

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

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

☐ BRONZE SPONSOR - $250
Entrance for two runners/walkers and name on tee shirt.

☐ INDIVIDUAL RUNNER - $20
Due Date: June 14
To register runners/walkers that are included in sponsorship, please email Gianluca Carrabs at cpa5k@janoverllc.com.

PLEASE SUBMIT LOGO CAMERA-READY ART IN EPS FILE FOR DIAMOND, PLATINUM, AND GOLD LEVEL SPONSORSHIP
Print name below as it should appear on the race tee shirt for Silver Sponsorship and for Bronze Sponsorship:

Company: ____________________________
Contact Person: _______________________
Address: ____________________________
City __________________ State _______ Zip ________
Phone: ___________ E-mail: ______________

Please make sponsorship checks payable to: NYSSCPA Nassau County and write: “Ellen Gordon CPAs 4(a): Cause/Island Harvest” on the face of the check.
Or register online at elitefeats.com?cpa5k.

Runner Registration
$20
(kids under 14 are half price)
Registration fee is $30 day of event.
Register online at elitefeats.com?cpa5k

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

Hosted by:

Register Today! elitefeats.com?cpa5k
Nassau Chapter Practice Continuity Committee

On April 26, 2019, our Committee hosted its final meeting of the Chapter year. It turned out to be one of the best. Robert Goldfarb, CPA of Janover and Larry Lioz, CPA, formerly of Margolin, presented live. Michael Gaines, CPA, formerly of Friedman, presented remotely. This panel of CPAs, who have retired or will soon from CPA firms, discussed:

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

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

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

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

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

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

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

Craig Morris, Chairman
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!

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**Committee Service Application**

- [ ] Accounting & Auditing
- [ ] Attorney & Accountants
- [ ] CFO & Financial Executives
- [ ] Cooperation with Educational Institutions
- [ ] Estate & Personal Financial Planning
- [ ] Financial Literacy
- [ ] Litigation & Forensic Service
- [ ] Management of Accounting Practice
- [ ] Membership
- [ ] Networking with Accountants
- [ ] Newsletter
- [ ] NextGen
- [ ] Practice Continuity
- [ ] Real Estate
- [ ] Other

- [ ] Small-Practice MAP
- [ ] Sponsorship
- [ ] Taxation
- [ ] Women’s Focus Group

Name: _________________________________________________
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Please forward your response to:
Vivian Martinez, CPA
Marks Paneth LLP
685 Third Avenue, New York, NY 10017
vjin@markspaneth.com | Tel: (516) 992-5776

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**Advertising Opportunities**

If you wish to advertise in the NYSSCPA — Nassau Chapter Newsletter promoting your business or self, please contact **Vivian Levy**

email: vivianlevy1@gmail.com

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**SPONSORSHIP**

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

**Vivian Levy**

NYSSCPA Nassau Chapter
c/o KVLSM LLP
415 Crossways Park Drive, Suite C
Woodbury, NY 11797
Phone: (516) 294-0400 | Fax: (516) 938-0491
vivianlevy1@gmail.com
INFORMATION AND HOTLINES

Have a Tax Problem?
The following members of the Taxation Committee are available to help answer your questions:

General:
Robert S. Barnett, CPA, Esq. (516) 931-8100
Jack Angel, CPA (516) 656-0800
Robert Lusthaus, CPA, Esq. (516) 937-1366
Robert J. Schaffer, CPA (516) 937-9500

Taxing Authorities
Ruth Sattig Betz, CPA (NYS) (516) 249-1919
Karen J. Tenenbaum, Esq. (631) 465-5000
Noelle T. Geiger, Esq. (IRS & NYS) (516) 336-2447
Yvonne Cort, Esq. (IRS & NYS) (516) 931-8100
Brian Gordon, CPA (NYS) (516) 510-6041

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

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

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

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

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420 Jericho Turnpike, Suite 321, Jericho, NY 11753 | Phone: (516) 656-0800
lynne@fuentesangelcpas.com

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

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

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

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

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MAIL AND EMAIL ADDRESS CHANGE FORM

CPA Certificate #: ____________________________

Name (Last, First, Middle Initial):

Address: ____________________________________________

City/State/Zip: ______________________________________

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Business Phone: _____________________________________

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□ I would like to receive an email with a direct link to the newsletter on nysscpa.org

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