A Message from the President

The September 15th filing deadline is behind us and I want to wish those faced with the October 15th deadline much success. Before we know it the holidays will be among us and then of course our annual New York’s resolution—Tax Season!

We have a number of great events in October and November to look forward to. Please look inside the newsletter for important dates and events for the various committees and activities.

The Networking with Accountants Committee (formerly our Cooperation with Bankers Committee) is cosponsoring their semiannual networking event with the Suffolk chapter at Milleridge Inn on October 18. This is a new format for the committees so please come out to support them.

Our 2nd annual Student CPAfest will take place on November 2 at Chateau Briand where we will have students from all Long Island colleges attending informative sessions on resume writing, interviewing skills, networking and the CPA Exam format, as well as a job fair which last year had almost 20 employers and 30-40 students obtaining internships and full time jobs. If you are looking for students for internships or employment don’t miss the only chance this year to meet them at our annual event as we anticipate a big crowd. Many small firms complain that the schools only promote large firms and our Chapter is now bringing the students directly to them with this event. See the flyer in the newsletter to register for the event and/or take a table. If you need a table banner we even help with that too.

Our annual Attorney Accountant Networking Event is November 28 in a new location, the Fox Hollow Inn. Normally we hold this event the week of Thanksgiving, but this year it will be held the week after. We are hoping that attendance will be at an all time high without the holiday and travel restrictions that we normally have.

We have a new Sponsorship Committee thanks to the efforts of Lynne Fuentes and Jill Scher. The committee is working on putting together programs for firms and supporters of the Chapter to increase their exposure at events to the benefit of our members. If you know anyone who may be interested or who could benefit, please have them reach out to Lynne at Lynne@fuentesangelpapas.com or Jill at Jill.Scher@marcumllp.com.

Please remember the Robert Katz Endowment at Hofstra, see page 18 for the information. Checks can be made payable to Hofstra University – memo line Katz Endowment or online at: www.hofstra.edu/katzendowment. (Please check with your employer about your company’s matching gift policy)

I want to encourage our members to try to attend as many seminars and events as possible and visit our Chapter website, www.nysscpa.org/nassau.

Please feel free to email me at abasile@basilecpa.com with any thoughts or suggestions you have for improving our chapter and I will bring the suggestions to our Board directly for consideration.

Thank you for the honor of being your President.

Sincerely,

Anthony Basile Ph.D., CPA, CVA, CFE
President
Nassau Chapter
Upcoming Meetings and Events ............................... 4-18
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Save the Dates:

**OCTOBER 2017**

**Litigation & Forensic Services**

- **CFO Committee**
  - Wednesday, 10/18
  - GAAP and Lease Update
  - Deloitte, Jericho
  - 8:00 – 10:00 AM

**Networking With Accountants**

- Wednesday, 10/18
- The Psychology of Business Development and How to Differentiate Yourself in a Networking Environment
- Milleridge Inn, Jericho
- 8:00 – 10:00 AM

**Accounting & Auditing**

- Tuesday, 10/24
- Deferred Taxes / TBD
- Marks Paneth, Woodbury
- 6:00 – 6:30 PM Dinner
- 6:30 – 8:00 PM CPE

**Practice Continuity & Succession Planning**

- Friday, 10/27
- The Vital Role of Marketing in Succession Planning
- On Parade Diner, Woodbury
- 8:00 AM

**November 2017**

**STUDENT CPA FEST**

- **Thursday 11/2**
- Chateau Briand, Carle Place
- 2:30 – 8:30 PM

**Real Estate Committee**

- Wednesday, 11/1
- New Partnership Audit Rules Effective for Partnership Tax Years Beginning after 12/31/17
- Marks Paneth, Woodbury
- 6:00 – 8:00 PM

**Accounting & Auditing**

- Friday 11/10
- FULL DAY EVENT
- Joint A & A Update w/Suffolk
- Radisson Hotel, Brentwood
- 9:00 AM – 5:00 PM

**CFO & Financial Executives**

- **Wednesday, 11/15**
- Service Org. Controls (SOC) audits
- Wells Fargo, Melville
- 8:00 – 10:00 AM

**Attorney Accountant Committee**

- Tuesday, 11/28
- Attorney Accountant Networking Mixer
- The Fox Hollow, Woodbury
- 6:00 – 9:00 PM

**Real Estate Committee**

- Thursday, 11/30
- GAAP vs. OCBOA for Real Estate Engagements
- Time & Place TBD

**Chapter Officials:**

- **PRESIDENT**
  - Anthony Basile, CPA
- **PRESIDENT ELECT**
  - Alex Resnick, CPA
- **VICE PRESIDENT**
  - Natalie Verbanac, CPA
- **TREASURER**
  - Geri Gregor, CPA
- **SECRETARY**
  - Vivian Martinez, CPA
- **DIRECTOR (PAST PRESIDENT)**
  - Lynne M. Fuentes, CPA
- **DIRECTORS**
  - Mark R. Cuccia, CPA
  - Kristina Albarella, CPA
  - Iola Damante, CPA
  - Jarred R. Berman, CPA
  - Kenneth Rick, CPA
  - Nannette Watts, CPA
  - Kenneth Hauptman, CPA
  - Wei Xu, CPA
- **ACCOUNTING & AUDITING**
  - Mark R. Cuccia, CPA
  - Tina M. Romano, CPA
  - Franco Martorana, CPA
  - Anthony Basile, CPA
  - Kristina Albarella, CPA
- **ATTORNEY & ACCOUNTANTS**
  - Kristina Albarella, CPA
  - Anthony Basile, CPA
- **CFO & FINANCIAL EXECUTIVES**
  - Anthony Aronica, CPA
  - Joanne Krush, CPA
  - Tunisia Islitsky, CPA
  - Vivian Martinez, CPA
  - Kenneth Hauptman, CPA
  - Eliot Lebench, CPA
  - Alex Resnick, CPA
  - Scott Sanders, CPA
  - Lawrence M. Just, CPA
  - Pamela Diamond, CPA
  - Robert J. Schaffer, CPA
  - Scott Sanders, CPA
  - Kristina Albarella, CPA
  - Lynne M. Fuentes, CPA
  - Pasquale Raffanelli, CPA
  - Louis Grassi, CPA
  - Scott Sanders, CPA
  - Neal Korenberg, CPA
  - Natalie Verbanac, CPA
  - Lynne M. Fuentes, CPA
  - Wei Xu, CPA
  - Jean David Chery, CPA
  - Garrick Turano, CPA
  - Alyssa Popov, CPA
  - Lynne M. Fuentes, CPA
  - Scott Sanders, CPA
  - Lisa Haynie, CPA
  - Eliot Lebench, CPA
  - Deana Wetzel, CPA
  - Vivian Martinez, CPA
  - Jodi Bloom-Piccone, CPA
  - Craig R. Morris, CPA
  - Vivian Martinez, CPA
  - Eliot Lebench, CPA
  - Alex Resnick, CPA
  - Lawrence M. Just, CPA
  - Pamela Diamond, CPA
  - Robert J. Schaffer, CPA
  - Jill Scher, CPA
  - Robert S. Barnett, CPA
  - Robert J. Schaffer, CPA
  - Geri Gregor, CPA
  - Lisa Haynie, CPA
  - Elizabeth Oberg, CPA
  - Natalie Verbanac, CPA
The Internal Revenue Service Office of Appeals (“Appeals”) is an independent organization within the IRS. It is intended to be fair, impartial, and objective. One goal of Appeals is to settle as many cases as possible without going to the United States Tax Court. According to the IRS, the issues of over 100,000 taxpayers are heard by Appeals each year.

Due to budget constraints, the IRS recently decided to cut back on face-to-face conferences with taxpayers at Appeals. There has been considerable pushback on this issue from tax professional groups. According to the National Taxpayer Advocate, limiting face-to-face meetings will increase rather than reduce costs overall for the IRS. In-person conferences are often influential in reaching a resolution. With fewer cases settled at Appeals, additional taxpayers will pursue litigation, at a higher expense to the taxpayer and the IRS. In September 2017, it was announced that in-person conferences will again be available for taxpayers upon request.

Tax practitioners should be aware of the opportunities and limitations of working with Appeals. It may be helpful to look at some of the current procedures.

**Thirty-Day Letter:** In the field examination context, when the auditor and the taxpayer disagree, the first step should be to request a conference with the auditor's manager. If that is unsuccessful, the auditor may issue a Revenue Agent Report (RAR) with a cover letter allowing thirty days to file a formal written protest. Known informally as a “30-day letter,” it provides the taxpayer with the opportunity to challenge the auditor's adjustments at Appeals. This is distinct from the subsequent “90-day letter” which is the Statutory Notice of Deficiency, providing the right to file a Petition in U. S. Tax Court.

There are certain required elements in the formal protest to Appeals, such as attaching the document with the proposed changes, listing the reasons for disagreement, and stating the facts and law to support the taxpayer's position. The protest must be signed under penalties of perjury.

**AJAC:** The Appeals Judicial Approach and Culture (AJAC) Project has clarified Appeals policies. The role of Appeals is not to investigate, but to settle disputes. The Appeals Officer generally does not raise new issues or reopen issues where the taxpayer and the auditor have come to an agreement. If the taxpayer submits new information or evidence, the matter may be sent back to audit to be developed further.

**Video Conference:** In July, 2017, the IRS announced that it was starting a pilot program for virtual web-based video conferences for taxpayers and their representatives. It remains to be seen whether a video conference can achieve the same results as in-person attendance.

**Early Referral and FTS:** The Office of Appeals can assist in other ways. The Early Referral program allows a taxpayer to request a problematic issue to be heard at Appeals, while the rest of the audit continues with the auditor. Fast Track Settlement utilizes a specially trained Appeals Officer as a mediator between the auditor and the taxpayer, with a goal of an expedited settlement in sixty days. Although FTS is not a new program, recently it has become more widely available for Small Business/Self-Employed audits.

**Conclusion:** The right to an appeal in an independent forum is guaranteed by the Taxpayer Bill of Rights. As tax professionals, we need to know and understand administrative appeals, so we can take action when appropriate to do so on behalf of our clients.
UPCOMING MEETINGS AND EVENTS

The Nassau Chapter Litigation Committee presents

Valuation and Forensics Panel

Wednesday, October 11, 2017

TOPICS:
Panel discussion on what you need to know to begin a career in the forensic and valuation field of accounting.

Chairperson: Pasquale Rafanelli, CPA/ABV, ASA, CVA, CBA, CFE, MAFF, CDFA


Panelists: Phil Kanyuk, CPA/CFF/ABV, ASA – Nussbaum Yates Berg Klein & Wolpow
John Spatola, CPA/ABV/CFF, CVA, CFE – Nawrocki Smith
Timothy Heck, CPA

Location: Grassi & Co. (Training Room) – 50 Jericho Quadrangle, Jericho, NY 11566

Time: 6:00 – 8:00 PM  Panel Discussion
8:00 – 9:00 PM  Networking

Course Code: TBD

CPE Credits: 2

Cost: $20  *Students attend free of charge*

Light refreshments will be served.
The Suffolk Chapter Cooperation with Bankers Committee and the Nassau Chapter Networking with Accountants Committee invite you...

Fall 2017
Banker/CPA Networking Event

The Psychology of Business Development and How to Differentiate Yourself in a Networking Environment

Wednesday, October 18, 2017
8 to 10 a.m.
at the Milleridge Inn, Jericho

Speakers Leigh Schuckman and Pete Fasulo of Sandler Training will let us know how to network more effectively:

- Attitude + behaviors + technique = making networking work
- Creating a 30-second intro that sets you apart
- The difference between building “strategic alliances” and “being aggressive”
- Developing a business development strategy that works

Hot breakfast included!

1 CPE Credit | $25 members | $40 non-members

REGISTER AT https://cpe.nysscpa.org/product/28768
Or contact Carol Pinto, (516) 937-9500, cpinto@ck-co.com
The CFO & Financial Executives Committee welcomes CPAs in industry to participate in our monthly meetings. The CFO Committee organizes monthly, interactive learning experiences guided by professionals of multiple disciplines. Our committee provides a confidential forum for industry CPAs at a senior level to seek advice, exchange guidance with fellow professionals, and develop a resourceful peer group.

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

The CFO Committee meets monthly from September through May. Meetings are held at 8:00 AM at Deloitte’s office in Jericho. We plan two dates with the Suffolk Chapter which will be held in Melville.

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/18/17</td>
<td>GAAP and Lease Update</td>
<td>Jericho / Deloitte</td>
</tr>
<tr>
<td>11/15/17</td>
<td>Service Org. Controls (SOC) Audits</td>
<td>Melville / Wells Fargo</td>
</tr>
<tr>
<td>12/14/17</td>
<td>Economic Update</td>
<td>Jericho / Deloitte</td>
</tr>
</tbody>
</table>

**Dates for the following seminars will follow in the next newsletter:**
- Tax Update
- Trusts & Estates
- Private Equity & CFOs
  
  **Healthcare / ACA update**
  **Employment Law**

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

**Meeting locations:** Jericho / Deloitte - 2 Jericho Plaza, Jericho
Melville / Wells Fargo – 58 South Service Road, Melville (Nov 2017)

**Committee Co-Chairs:**
- Joanne Krush, CPA, CFO  SterlingRisk  jkrush@sterlingrisk.com  (516) 773-8605
- Anthony Aronica, CPA, CFO  Albert Kemperle, Inc.  anthony.aronica@kemperle.com  (631) 608-6203

Please contact Anthony Aronica or Joanne Krush if you'd like more information.
UPCOMING MEETINGS AND EVENTS

NYSSCPA - NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE MEETING

October 20, 2017

Cybersecurity in Today’s World

Hear from marketing and public relations professionals on how to utilize social media, newsletters and building your own website to effectively market your practice and hear from a practitioner who uses these same professionals to improve her firm’s brand and awareness.

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

WE LOOK FORWARD TO SEEING YOU THERE!

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

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

Nassau Chapter Practice Continuity Committee

On July 28, 2017, the Nassau Chapter Continuity of Practice Committee held its first breakfast meeting of the new Chapter year. Our meeting covered planning for our 2017-18 meetings along with the topic “Key Succession Planning Elements to a Partnership Agreement.” The agenda was covered by attorney Neil Katz, who has drafted many CPA firm agreements, along with Larry Bloom, CPA, Craig Morris, CPA, and thoughts from Eliot Lebenhart, CPA. We discussed the perspective of a CPA entering a partnership for succession and matters he or she should be concerned about in their partnership agreement, including:

- admission of new partners;
- buy-outs and retirement of owners;
- restrictions on competition from former owners;
- compensation of owners, death and disability of owners;
- governance of day-to-day operations;
- major decisions, such as mergers with other firms, terminations of partners, and breaking up the firm;
- It was strongly emphasized that without an agreement, these matters are in the hands of courts and lawyers.

In planning the 2017-2018 year, we set our future meeting schedule, as follows:

- **October 27, 2017** – the topic planned is “The Vital Role of Marketing in Succession Planning,” with guest speaker Edie Reinhardt, a Principal of RDT Content Marketing LLC, a marketing consulting firm specializing in helping professional services firms. The agenda is expected to include:
  - why marketing should be a part of the planning discussions early in the process;
  - the steps needed and talent required to make any transition as smooth as possible to all your internal and external audiences;
  - changes in the accounting profession of the near future, including changes in options for succession, how firms will operate and transition with GenX and Millennials and importance and retention of female staff, and;
  - why marketing and business development is important to firm leadership.

- **January 26, 2018** – Daniel G. Mazzola, CFA, CPA will speak on “The Role of Social Security in a CPA’s Retirement Plan.” While most of our CPA participants are financially astute, it seems many are not familiar with the intricacies of Social Security. After attending Dan’s presentation for the Nassau Chapter’s Tax Committee in November I was amazed at how much there is to know. He will surely educate our audience and help us plan to maximize Social Security as part of our succession strategy.

- **April 27, 2018** – is our final meeting of the Chapter year, with a topic to be announced later.

Please remember to schedule our events in your calendar now, to avoid conflicts. Our meetings are generally held at On-Parade Diner, the last Friday of the meeting month, though dates and locations are subject to change. A coupon for the 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 your participation.

*Craig Morris, Chairman*
# Accountant & Auditing Committee
## Fall 2017 Calendar

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Topic</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/24/2017</td>
<td>6:00 – 6:30 PM - Dinner 6:30 – 8:00 PM - CPE</td>
<td>Deferred Taxes/TBD</td>
<td>Marks Paneth LLP</td>
</tr>
<tr>
<td>11/10/2017</td>
<td>FULL DAY 9:00 AM – 5:00 PM</td>
<td>Joint A &amp; A Update with Suffolk Chapter</td>
<td>Radisson Hotel *</td>
</tr>
<tr>
<td>12/12/2017</td>
<td>6:00 – 6:30 PM - Dinner 6:30 – 8:00 PM - CPE</td>
<td>A &amp; A Update</td>
<td>Marks Paneth LLP</td>
</tr>
</tbody>
</table>

All meetings held at Marks Paneth LLP, Training Room (Lower Level), 88 Froehlich Farm Blvd, Woodbury, NY unless otherwise noted.

* 11/10/17 Event will be held at the Radisson Hotel, 110 Vanderbilt Motor Parkway, Brentwood, NY 11717
Practice Continuity Committee

The Vital Role of Marketing in Succession Planning

Friday, October 27, 2017, 8:00 AM

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

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

Tel: (516) 681-1121
Fax: (516) 681-1203
Email: ginette@morriscpas.com

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, October 26).
_____ 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.

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

Name:
Firm Affiliation:
Address:
Email:
Telephone:
3rd Annual

Financial Fitness Day

Hosted By: The Financial Planning Association of Long Island and the Financial Literacy Committee of the Nassau Chapter of NYSSCPA

LOCATION:
Freeport Memorial Library
144 W. Merrick Rd.
Freeport, NY 11520

FREE ADMISSION - ALL ARE WELCOME!

Saturday, October 28, 2017
10:00 AM – 3:00 PM

CPAs and CFPs will be available for individual consultations free of charge

Have questions about your finances that need professional guidance? Then, you should come!

PROGRAMS
10:30AM: Credit Maintenance and Repair
10:30AM: Financial Consequences of Divorce
11:30AM: Investing Concepts and Strategies
11:30AM: Taking Control of Your Financial Life
1:00PM: Smarter Social Security
1:00PM: Talking to Children About Money
2:00 PM: Navigating the Medicare Maze
2:00 PM: Estate Planning and Protection

For more information:
(516)783-9540
fpali@optonline.net
www.fpali.org
RSVP on website.
Walk-Ins Welcome

Absolutely NO solicitations will take place

Refreshments and Food will be provided

Exit M8W off Meadowbrook Parkway

New York State Society of CPAs
Chartered 1953
NASSAU CHAPTER
www.nysscpa.org

11
# Real Estate Committee

## SAVE THE DATE

<table>
<thead>
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<tr>
<td>11/1/2017</td>
<td>New Partnership Audit Rules Effective for Partnership Tax Years Beginning After December 31, 2017</td>
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<tr>
<td>11/30/17</td>
<td>GAAP vs. OCBOA for Real Estate Engagements</td>
</tr>
<tr>
<td>1/9/18</td>
<td>Deprecation on Real Estate, including Recapture</td>
</tr>
</tbody>
</table>
A TECHNICAL MEETING SPONSORED BY THE REAL ESTATE COMMITTEE

New Partnership Audit Rules Effective for Partnership Tax Years Beginning after December 31, 2017

WEDNESDAY, NOVEMBER 1, 2017 from 6:00 – 8:00 PM

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

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

Designed for: Professionals involved in real estate engagements.

Speaker: Mark E. Wilensky
         David J. Heymann
         Meltzer, Lippe, Goldstein & Breitstone, LLP

Topics will include:
• Eligibility rules for making the election out of the new audit regime
• Review of various actions under the new audit regime where the partnership representative has the sole authority to bind the partnership and the partners

Course Level: Basic/Intermediate

Course Code: TBD

CPE Credits: 2
UPCOMING MEETINGS AND EVENTS

SAVE THE DATE:

STUDENT CPA COLLEGE FEST 2017

NYSSCPA NASSAU CHAPTER PRESENTS

CHATEAU BRIAND
440 Old Country Rd, Carle Place, NY 11514

11/2/2017
6PM - 8:30PM

Come meet accounting students from local universities and share your career experiences, firm culture and hiring opportunities.

6PM-8:30PM : Networking, Cocktail Hour & Job Fair

Table Opportunity: $250
Admission to Networking & Job Fair, Table, includes 2 attendees

Each additional attendee is $50

REGISTER HERE: cpe.nysscpa.org/product/28613

QUESTIONS? CONTACT: NYSSCPACOLLEGEFEST@GMAIL.COM
The NYSSCPA Suffolk Members in Industry Committee and the NYSSCPA Nassau CFO & Financial Executive Committee invites you:

Service Organization Control (SOC) Reporting: The Changes to SAS70

Wednesday, November 15, 2017
8 to 10 a.m.
at Wells Fargo, 58 S. Service Rd., Lower Level, Melville

Discussion will include a history of the former SAS 70 standard, abuses of the use of SAS 70 reports, and the reason for the change to the new SSAE 16, SSAE 18 standard. We will discuss the three (3) Service Organization Control (SOC) reporting options.

Speaker:
John K. Hoffman — Nawrocki Smith LLP

2 CPE credits (course code: 29085806)

REGISTER AT https://cpe.nysscpa.org/product/28646
For more information, please contact Janet T. Verneille at jverneille@empirenb.com
The Attorneys and Accountants Joint Committee, in cooperation with the NYSSCPA Nassau Chapter, will be mingling and fundraising for the Interfaith Nutrition Network (The INN). Enjoy a multi-course, fabulous cocktail-style dinner and open bar throughout entire event.

Fundraising raffles throughout the event!

Bring a non-perishable food item and a business card for a free raffle ticket! All food donations, as well as the net proceeds from the event, will go to the Interfaith Nutrition Network!

Register and pay online at this link: https://cpe.nysscpa.org/product/28710 or complete and mail the form below.

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

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

Name ____________________________________________
Address __________________________________________
Email _____________________________________________
Firm Affiliation ____________________________
Phone __________________________________________

_________ Attorney ___________ Accountant

*Attendance is limited to attorneys and accountants only.

Event Details

Tuesday, November 28, 2017
6 pm - 9 pm
The Fox Hollow
7725 Jericho Turnpike
Woodbury, NY 11797

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

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

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

Attorney Co-Chairs
Neil D. Katz, Esq.
neil@ksclawgroup.com
(631) 683-8700

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

Yvonne R. Cort, Esq.
ycort@cbmslaw.com
(516) 931-8100 ext. 370
Nassau Chapter 65th Annual All-Day Tax Conference

Saturday, December 2, 2017 OR Sunday, December 3, 2017

Long Island Marriott Hotel & Conference Center
101 James Doolittle Boulevard, Uniondale, NY

8:30 AM – 5:00 PM (Check-in begins at 8:00 AM)

CONFERENCE TOPICS & SPEAKERS

TOPICS
- Federal and New York State Tax Updates
- Corporation Tax Workshop
- Estate Tax Update
- Individual and Trust Tax Workshop
- IRS and NYS Collections and Tax Controversies

SPEAKERS
- Neil D. Katz, Esq., Katz, Smith & Chwat PC
- Joseph Endres, Esq., Hodgson Russ LLP
- Karen J. Tenenbaum, Esq., LLM, Tenenbaum Law, PC
- Yvonne R Cort, Esq., Capell Barnett Matalon & Schoenfeld LLP
- Eric M. Kramer, CPA, Esq., Farrell Fritz, PC
- Robert S. Barnett, CPA, Esq., Capell Barnett Matalon & Schoenfeld LLP
- Scott Sanders, CPA, PFS, CGMA, CFP, CFS, Gettry Marcus CPA, P.C.

Program Details

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

Course Details

Time: 8:30 AM – 5:00 PM
(Check-in begins at 8:00 AM)

Course Level: Update

Prerequisite: None

Method of Presentation: Lecture

Field of Study: Taxation

Recommended CPE Credit Hours: 8

Developer: Foundation for Accounting Education

Course Code: 28603823 Sat; 28603824 Sun

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

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

Register online at www.nysscpa.org. • Register by fax at (866)495-1354. • Register by phone at (800) 537-3635.
SAVE THE DATE

January 11, 2018, 6:00 – 8:00 PM
Location – TBD

Come de-stress after the holidays and kick off the new year with the Women’s Focus Group.

The Robert Katz Endowment at Hofstra University

The Robert Katz Endowment in Accounting, Taxation and Legal Studies will be established in perpetuity in memory of the significant contributions that Professor Katz has made to Hofstra University, the fields of accounting/taxation and the tremendous reputation he has established. Professor Katz was a Distinguished Professor at Hofstra University, Honorary Alumnus, Teacher of the Year, and an outstanding business and community leader.

Please consider supporting this endowment and help us keep Bob’s legacy alive at Hofstra University.

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I PLEDGE: $100  $250  $500  $1000  Other $__________

to support the Robert Katz Endowment in Accounting, Taxation and Legal Studies at Hofstra University.

(Checks can be made payable to Hofstra University – memo line Katz Endowment)

Contributions can also be made online at: www.hofstra.edu/katzendowment

PLEASE CHECK WITH YOUR EMPLOYER ABOUT YOUR COMPANY’S MATCHING GIFT POLICY.
NextGen Golf Workshop Networking Event

On August 22, the Nassau Chapter NextGen Committee held its first Golf Workshop Networking Event which was held at Harbor Links Golf Course. We had great weather and everyone enjoyed it. We foresee this becoming an annual event.
Annual Ellen Gordon CPAs 4(a): Cause 5K Run/Walk to End Hunger

On June 17, our chapter held its Annual Ellen Gordon CPAs 4(a): Cause 5K Run/Walk to End Hunger at Eisenhower Park. This year we collected over $6000 for Island Harvest.
EVENT HIGHLIGHTS

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

Island Harvest

Debra Gallo,
daughter of Susan and Frank Gallo

Roy Massa, Bob Goldfarb, Lisa Haynie, Robert Barnett, Alex Resnick, Lynne Fuentes, Scott Sanders (and Jillian and Tyler Sanders), John Barone and Karen Tenenbaum
Expand Your Knowledge — Join A Committee

Committee Service Application

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

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

Use the coupon to join a committee today!

Committee Service Application

☐ Accounting & Auditing
☐ Attorney & Accountants
☐ CFO & Financial Executives
☐ Community Affairs & Public Relations
☐ Cooperation with 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
☐ NextGen
☐ Practice Continuity
☐ Real Estate
☐ Other

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

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

Advertising Opportunities

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

email: vivialney1@gmail.com

SPONSORSHIP

If you wish to sponsor any Nassau Chapter or committee event, download our sponsorship contract here or 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
vivialney1@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
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vivianlevy1@gmail.com

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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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