A Message From The President

It’s been three wonderful months into my term as the 60th President of the Nassau Chapter of the NYSSCPA and I’m very pleased with the position and progress of the Chapter thus far.

I’d be remiss not to mention the hard work and dedication of the committed Chapter officers, the board, and our diligent committee members. I would like to give a big thank you to all of those who attended the May 9th Installation Dinner and assisted in making the event both memorable and successful. It was meaningful to me personally, but doubly so due to the funds raised for Island Harvest and the FAE Scholarship Fund, two very worthy causes.

As many of you know, I have committed this year to developing a new committee titled, “Financial Literacy,” where our Chapter can reach out to young children, ages five through 15, to introduce them to the concept of managing and saving money. We are in discussions with Capital One Bank to partner with us on this important initiative and will keep you apprised of any updates.

Additionally, over the past year, our 2012 Chapter President, Lisa Haynie, and I have been extremely active in rejuvenating our Young CPA Committee. As you’ll read in this month’s newsletter, they have held and participated in some exciting events for our Chapter and for young CPAs in general. In August, we held our Young CPA event mixer at The Deck at Four in Melville and had more than 140 attendees present. We’re very proud of the steps they are taking to help move the Chapter and committee forward and advance the goals of young CPAs as a whole.

I’d also like to thank Michael Gaines, Eric Kramer, and Mark Meinberg, who comprise the President’s Advisory Committee. In total, these three men have more than 60 years of service to this Chapter and I’m honored to be able to turn to them for both advice and guidance on issues related to our Chapter and board.

In the past, I know there have been some communication deficiencies between the Chapter and our members. Therefore, we’re happy to announce that both our NYSSCPA/Nassau Chapter LinkedIn and Facebook pages are now live. To join the LinkedIn group, please visit: http://www.linkedin.com/groups?home=&gid=5010322 and click “Join Group.” You must be a LinkedIn member and your annual NYSSCPA dues must be up to date in order to maintain membership in this group.

To follow us on Facebook, please visit https://www.facebook.com/NYSSCPANassau and click “Like.” You must be a Facebook user in order to “Like” and take full advantage of the page. Our Chapter and committee events, along with photos, will be posted to these two sites for all members to view.

We have some exciting initiatives and events coming up in the months ahead. We are currently working with Larry Lucarelli, the president of the Suffolk Chapter, along with Robert Busweiler, the public affairs manager of the NYSSCPA, to organize a joint Chapter legislative meeting for our members to get in front of our Legislators. Stay tuned for more details on that event.

To recap some of our more recent events, we held our 12th Annual Ellen Gordon CPAs 4(a): Cause 5K Run/Walk and our Career Opportunities in the Accounting Profession (COAP) program, both during the month of June.

Thank you and congratulations to our Run/Walk committee for putting together such a successful event on June 15th. One hundred percent of the net profits went directly to Island Harvest, the largest hunger relief organization on Long Island.

I’d also like to thank the Nassau Chapter’s COAP executive board for their tireless work in putting together such an informative program at Adelphi University from June 22-26. Thirty students from different Nassau County high schools participated in the event, which covered topics such as ethics and personal behavior, writing cover letters and thank-you notes, dressing for success, and much more.

On August 29, we held our annual golf outing at the North Hills Country Club. Originally slated for June, it was postponed due to weather. I’m happy to report we had more than 100 attendees take part in the event.

Your next opportunity to network will take place on September 18th, when we have our joint event with the Suffolk Chapter, hosted by the Cooperation with Bankers & Credit Grantors Committee at the Crest Hollow Country Club in Woodbury. Additional details are on the Chapter’s website, LinkedIn, and Facebook pages. So please be sure to follow each for news and updates.

I look forward to a successful year ahead and continuing to develop new programs and relationships that will help the Chapter advance and “give back.” I encourage all members and Committee members to reach out to me with any questions, concerns, and/or comments. I will continually strive to improve the Nassau Chapter and make it as impactful to the society as a whole, as I know it can be.

Thank you for the honor of being your President and I look forward to seeing everyone at our next event.

Sincerely,

Scott Sanders, CPA
President
Nassau Chapter
Save The Dates:

### September 2013

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
<th>Time</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting &amp; Auditing</td>
<td>Tuesday 24th</td>
<td>6:00 PM - 8:10 PM</td>
<td>Grassi &amp; Co</td>
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<td>How a Banker Reads Financial Statements</td>
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<tr>
<td>Estate Planning &amp; Personal Financial Planning</td>
<td>Wednesday 25th</td>
<td>6:00 PM - 8:30 PM</td>
<td>Crest Hollow Country Club</td>
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<td>Jt. Nassau/Suffolk</td>
<td>Wednesday 18th</td>
<td>6:00 PM - 8:30 PM</td>
<td>Crest Hollow Country Club</td>
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<td>Cooperation w/ Bankers &amp; Credit Grantors</td>
<td>Wednesday 25th</td>
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<td>Crest Hollow Country Club</td>
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<td>Taxation Committee</td>
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<td>Cooperation w/ Bankers &amp; Creditors</td>
<td>Wednesday 25th</td>
<td>6:00 PM - 8:30 PM</td>
<td>Crest Hollow Country Club</td>
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<td>Real Estate</td>
<td>Thursday 19th</td>
<td>8:00 AM - 10:00 AM</td>
<td>Marks Paneth &amp; Shron</td>
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<tr>
<td>Financial Literacy Committee</td>
<td>Friday 27th</td>
<td>8:00 - 10:00 AM</td>
<td>Meltzer Lippe</td>
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<tr>
<td>Small Firm MAP</td>
<td>Friday 20th</td>
<td>8:00 - 10:00 AM</td>
<td>On Parade Diner</td>
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<td>Working With Attorneys</td>
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<td>October 2013</td>
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<tr>
<td>Accounting &amp; Auditing</td>
<td>Tuesday 22nd</td>
<td>6:00 PM - 8:10 PM</td>
<td>Grassi &amp; Co</td>
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<tr>
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<td>Thursday 17th</td>
<td>6:00 PM - 8:30 PM</td>
<td>Chateau Briand</td>
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<td>Student Night</td>
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<td>Estate Planning &amp; Personal Financial Planning</td>
<td>Wednesday 23rd</td>
<td>6:00 PM - 8:30 PM</td>
<td>Grassi &amp; Co</td>
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<tr>
<td>IRA Beneficiary Designation</td>
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<td>Taxation Committee</td>
<td>Saturday 26th</td>
<td>9:00 AM - 1:00 PM</td>
<td>Meltzer Lippe</td>
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<td>Federal &amp; State Update, Affordable Care Act, Liens &amp; Levies, Year-End Planning</td>
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<td>Accounting &amp; Auditing</td>
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<td>On Parade Diner</td>
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<td>Real Estate</td>
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<td>Negotiating the Commercial Lease – Counseling Your Clients and Maximizing Results</td>
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Table of Contents:

1. Message From The President
2. Newsletter Overview & Information
3. Committee Spotlight
4-10. In The News
11-19. Upcoming Meetings
20. Committee Application
21-25. Event Highlights
26-29. Calendar of Upcoming Events
30-32. Contact Board Committee & Chairs
33. Newsletter Deadlines
33. Change Form

Committee Officials:

- **President**: Scott Sanders, CPA
- **President Elect**: Robert S. Barnett, Esq., CPA
- **Vice President**: Philip H. Kanyuk, CPA
- **Secretary**: Lynne M. Fuentes, CPA
- **Treasurer**: Lisa Haynie, CPA
- **Directors**:
  - Alex Resnick, CPA
  - Anthony Aronica, CPA
  - Eliot Lebenhart, CPA
  - Howard H. Fine, CPA
  - Anthony Basile, CPA
  - Geri Gregor, CPA
  - Joel Dressner, CPA
  - Cynthia Sze, CPA
- **Accounting & Auditing**:
  - Jeffrey Yonkers, CPA
  - Mark Goldschmidt, CPA
  - Mark R. Cuccia, CPA
  - Marcy Greenfield, CPA
  - Joel Reisman, CPA
- **CFO & Financial Executives**:
  - Manilo Cañiero, CPA
  - Anthony Aronica, CPA
- **Cooperation with Bankers & Credit Grantors**:
  - Neal Korenberg, CPA
- **Estate & Personal Financial Planning**:
  - Christine P. Hallahan, CPA
  - Eric M. Kramer, CPA
  - Scott Sanders, CPA
- **Financial Literacy**:
  - Karen J. Tennenbaum, CPA
  - Cynthia Sze, CPA
  - Timothy Coville, CPA
  - Justine DeVito Tenney, CPA
- **Litigation & Forensic Services**:
  - Nanette Watts, CPA
  - John M. Spatola, CPA
- **Management of Accounting Practice**:
  - Louis Grassi, CPA
- **Membership**:
  - John V. Pellitteri, CPA
- **Medical & Other Professionals**:
  - Neil Guber, CPA
- **Newsletter**:
  - Christine P. Hallahan, CPA
  - Michael Gaines, CPA
- **President's Advisory Committee**:
  - Mark L. Meineberg, CPA
  - Eric M. Kramer, CPA

Practice Continuity
- Eliot Lebenhart, CPA
- Craig Morris, CPA
- Larry Bloom, CPA
- Anthony Basile, CPA
- Cynthia Sze, CPA
- Joel Dressner, CPA
- Vivian Martinez, CPA
- Scott Sanders, CPA
- Alex Resnick, CPA
- Iola Damante, CPA
- Mark Plostock, CPA
- Christine P. Hallahan, CPA
- Geri Gregor, CPA
- Toni-Ann Dalton, CPA
- Elizabeth Oberg, CPA
- Joshua S. Sechter, CPA
- Bruce A. LaMarca
- Carmelina Hernandez, CPA
It’s been an extremely active and informative year for our Young CPA Committee thus far.

On August 8th, we held our “Super-Sized Networking Event – Remix!”, which was sponsored by Bridgehampton National Bank. I’m happy to report that we had more than 140 attendees for this joint function, which, in addition to both Nassau and Suffolk NYSSCPA members, included Risk Management Associates, Young Professionals; the New York State Bar, 10th Judicial District; and the Suffolk/Nassau Bar Association, Young Professionals. I would like to give a special thanks to Colleen Columbia and Flo Federman of Baker Tilly, who made this event so spectacular. Also, I would like to thank everyone else for their help in making this event a huge success. We hope to hold more joint programs in the future, as it cannot be stressed enough how important in-person networking is, especially for young professionals. Too often, we rely on emails, phone calls, and social networking sites, when the most effective course of action is the old-fashioned handshake.

Speaking of which, Bruce A. LaMarca of Sanders Thaler Viola & Katz, LLP and I took part in the Utica Young CPA Conference, held in June. Attended by more than 150 professionals, the two-day event featured roughly 10 speakers. Bruce and I were both impressed by the caliber of the speakers invited, in particular J. Michael Kirkland, Director of Deutsche Bank, AG, Accounting Policy and Advisory Group; Diane Lange, Founder of Proclivity LLC; and Robert A. Shutt, Owner of RASolutions.Net.

Mr. Kirkland discussed his own experiences in accounting and how it is every member’s responsibility to get more CPAs to join the NYSSCPAs. He also talked about the importance of the organization and its events, and how to be a better CPA and professional in general.

Ms. Lange shared her expertise in developing positive corporate cultures, through improving performance management, conflict resolution, change management, and team building. Her speech focused on how to become a better leader in your profession, both within your own office and the organizations you belong to. Ms. Lange’s approach to leadership centered on choosing a vision, deciding what you value, and then acting upon those values to inspire your employees, praise them, give them a sense of self-worth, and then reward them accordingly. She quoted Dwight Eisenhower who said, “The essence of leadership is to get others to do something because they think you want it done and because they know it is worthwhile doing.” I was able to take away from her presentation that a leader is a dealer in hope, you don’t need a title to be one, and even one person can make a difference for an entire organization with minimal ingredients.

Perhaps most intriguing, though, was Mr. Shutt’s speech. He focused on something I think many have lost sight of in our increasingly digital workplace – business etiquette. He mentioned the importance of “networking without the ‘Net,” as well as business dining and communications etiquette. We were inspired by Mr. Shutt’s belief that the ability to follow simple rules of etiquette in networking and business dining situations can advance your career and increase your sales. It can even improve customer satisfaction with you and your organization. How you present yourself matters!

We look forward to keeping you apprised of our events for the coming year, holding additional meetings with other chapters, and planning joint functions with other NYSSCPA/Nassau committees.

If you would like to be added to our registration list for future events, please feel free to email me at Joshua.Sechter@BakerTilly.com.

Joshua Sechter, CPA/ABV, CFE
Young CPAs Committee Chair
Baker Tilly Virchow Krause, LLP
Payment fraud continues to be one of the biggest risk management challenges businesses face today. According to the Association for Finance Professionals' 2013 Payments Fraud and Control Survey, 61 percent of organizations experienced attempted or actual payment fraud in 2012, and 27 percent of those affected reported that the number of fraud incidents increased. CPAs can play an important role in helping their clients navigate risk management tools and establish best practices.

Fraud prevention may not be a top priority for all corporate managers, especially those who believe their banks will bear liability for fraud losses they incur. That’s why it is crucial for CPAs to communicate to their clients that businesses can be held liable for payment fraud.

Although media attention has recently focused on technically sophisticated online banking scams, paper checks remain the organizations’ most vulnerable payment method. CPAs can help their customers detect electronic and check fraud by conducting both regular and surprise audits and establishing internal financial controls.

Additionally, CPAs should encourage their clients to take advantage of fraud prevention tools offered by their bank. Banks such as Capital One Bank offer tools that can minimize exposure to check fraud and unauthorized electronic debits. For example, Positive Pay ensures that checks presented for payment and checks included in issuance data match exactly, so that businesses can review any exceptions. Electronic Debit Protection allows clients to limit ACH debits posted to trusted business partners. Finally, Dual Control Authorization requires a set of approvals before online payments are transmitted for processing.

Businesses may ultimately be responsible for protection against payment fraud, but many may not have the right tools in place to effectively manage this risk. CPAs can play a key role in helping clients understand the services available to combat fraud, and how to protect their systems.

By:
Drew S. Crowley
drew.crowley@capitalone.com

Elizabeth A. Madigan
Capital One Bank Professional Services
elizabeth.madigan@capitalone.com
The Nassau Chapter has approved the formation of a committee dedicated to promoting the financial literacy of children and young adults in our communities. The Financial Literacy Committee’s mission statement is

“to reach out to children in order to guide them on their journey toward financial literacy and fiscal responsibility. We will expose them to engaging and instructional materials that will help them understand money and finances at an age-appropriate level.”

The Committee is led by its founding Chairperson, Karen J. Tenenbaum, Esq., LL.M. (Tax), CPA. She is supported by Vice Chairperson Cynthia Sze, CPA; Committee Treasurer Justine Tenney, CPA/PFS, CFP; Committee Secretary Tim Coville, CPA, MBA, PhD; and a diverse group of initial Committee members. The group has varied credentials, talents, and backgrounds, ranging from an attorney specializing in debt relief, a video productions entrepreneur, an academic or two and yes, some practicing CPAs. Still, more members are encouraged to join us in this important effort to give very practical knowledge back out to our communities.

From the Committee’s inaugural meeting, held on July 25, it was determined that the initial focus of the group would be directed towards the creation of a financial literacy fair for young children, ages three through nine, and the development and organization of relevant online resources. These online resources are intended to be useful for all Nassau Chapter members to help promote financial literacy for their client’s children and other children in the community.

Though the Committee is in its early days of existence, some valuable resources are already available at: http://finance.groups.yahoo.com/group/NassauNY_CPAs_FinLitCom/:  

- Our mission statement
- Links to important websites
- An invitation to our next meeting

As a Committee member, you can also upload content you think is valuable to the group, send emails, view member profiles, and access the important links to websites mentioned. Join today to access these and future resources.

Our next meeting will be held on Friday, September 27, 2013 from 8 a.m. to 10 a.m. in the 2nd Floor Conference Room at the office of Cynthia Sze with Marks Paneth & Shron LLP, 88 Froehlich Farm Blvd. in Woodbury. Please RSVP to Cynthia at CSze@markspaneth.com or to 516-992-5738. A light breakfast will be provided compliments of Marks Paneth & Shron LLP. The meeting will focus on plans for our Financial Literacy Fair and additional website resources. There will also be an opportunity to discuss your insights and ideas for the future direction of our Committee please mark your calendars and plan to attend. For more details on our Committee, contact us at NassauNY_CPAs_FinLitCom@yahoogroups.com.

We look forward to this opportunity to serve our chapter’s membership and the children in our area. Please support these efforts with your ideas and hands-on involvement in our activities.

Tim Coville, Secretary
NYSSCPA Nassau CFO Committee

The CFO & Financial Executives Committee would like to invite CPAs in industry to participate in our monthly meetings. Our committee provides a confidential forum for CFOs to seek advice and provide experienced guidance to fellow professionals. 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.

### DATE | TOPIC | LOCATION
--- | --- | ---
Sept. 25, 2013 | Federal & State Tax Update | Mineola
Oct. 22, 2013 | GAAP & Private Company Reporting (PCC) Update | Mineola
Nov. 19, 2013 | Corporate Governance | Melville
Jan. 22, 2014 | Retirement Income Planning | Mineola
Feb. 25, 2014 | LinkedIn & Social Media for CFOs | Melville
Mar. 25, 2014 | Commercial Insurance Update | Mineola
Apr. 22, 2014 | PEOs & Self Insurance | Mineola
May 20, 2014 | CFO Best Practices | Mineola

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

### MEETING TIME & FORMAT:
8am to 10am (Two CPE credits) light breakfast served $10 meeting fee

### MEETING LOCATIONS:
**Mineola:** Meltzer, Lippe, Goldstein & Breitstone - 190 Willis Ave., Mineola, NY 11501
**Melville:** location to be determined (Joint meeting with Suffolk Chapter)

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

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Please RSVP:

Email this form to: aaronica@graphicpaper.com
Or fax this form to: 631-439-8822
On July 26, the Nassau Chapter Continuity of Practice Committee held its first breakfast meeting of the new Chapter year. Our agenda covered:

- a presentation by Debbie Siegel, CPA on attracting youth to our firms
- a presentation by Alex Resnick, CPA on Practice Continuation agreements
- an open discussion of member continuity concerns and issues
- organizational and planning matters for 2013-2014 year, and meeting agendas
- what we would like to accomplish in the next year.

We discussed various concerns about succession planning and continuity for solos and small firms, implementation of practice continuation arrangements and how to approach them and related continuity matters. We also addressed concerns about attracting younger CPAs to a small practice environment and possible solutions.

As a result of these discussions, we set our future meeting schedule for the upcoming year, as follows:

- **October 25, 2013** – Jonathan Gassman, CPA, a partner at Gassman Financial Group and a principal of G & G Planning Concepts, and Deidre Siegel, Founder and CEO of PEAR™ Core Solutions, Inc., a recognized leader in providing companies around the world with comprehensive best practices in Human Resources, will address human resources as a solution to CPA succession. As part of their presentation, they will address how to attract and develop young CPAs as a means for succession in our firms.

- **January 24, 2014** – Alex Resnick, CPA and partner with Wild, Maney & Resnick, CPAs, will organize a meeting on Practice Continuation arrangements, including attention to legal and regulatory limitations, ethical concerns, and exposure to liability issues. Alex expects to bring in speakers with relevant expertise, to be named in a future newsletter.

- **April 25, 2014** – Robert Barnett, an attorney and partner in the firm of Capell Barnett Matalon & Schoenfeld LLP, will join together with Joel Sinkin, President of Transition Advisors, LLC, a firm that exclusively consults on transactions for public accounting firms, to address the structural, tax, and contractual details to be considered in succession arrangements.

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

Craig Morris, Chairman
Larry Bloom, Anthony Basile,
Eliot Lebenhart, Co-Chairmen
Nassau Chapter Practice Continuity Committee

IN THE NEWS

HUMAN RESOURCES AS A SOLUTION TO CPA SUCCESSION

Mr. Jonathan Gassman, CPA, Gassman Financial Group
Ms. Deidre Siegel, Founder and CEO of PEAR™ Core Solutions, Inc.

Friday, October 25, 2013
On Parade Diner, Woodbury, NY
7980 Jericho Turnpike, Woodbury, New York, 11797
phone # (516) 364-1870

Please RSVP:

Please RSVP by phone, fax or email as early as possible so we can ensure adequate seating.

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 $20.00 per person (must be received by noon, Thursday, October 24) or;
___ I prefer to pay $___ at $25.00 per person at the door. (Walk-ins may be limited due to space availability).

Checks are payable to NYSSCPA, Nassau Chapter.

Name: ____________________________
Firm: ____________________________
Address: ____________________________
Telephone: ____________________________
Email: ____________________________
The New York State Department of Taxation and Finance has two new tools for enforcing payment of outstanding tax liabilities. The 2013-2014 Budget Bill, passed in late March 2013, and effective immediately, provided that the state can suspend the drivers’ licenses of taxpayers who owe $10,000 or more of tax, interest and penalties to the state. The provision was modeled after a similar program which suspends the drivers’ licenses of those who are delinquent in payment of child support. The Budget Bill also modified the law to permit the state to issue income executions without first filing a tax warrant for the assessments concerned.

The new law requires the state to notify the taxpayer of the impending suspension of his or her driver’s license in advance of the action. The taxpayer will have 60 days to resolve the liabilities, from the mailing date of the notice to the taxpayer. If the taxpayer does not do so, then the Department of Motor Vehicles will advise the taxpayer that the license will be suspended in 15 days. If the liabilities are still not resolved at the end of that period, the license will be suspended. The suspension will stay in place until the taxpayer pays the liabilities in full, or makes other acceptable payment arrangements. The law permits the state to continue with other collection action while the suspension is in place.

Making it easier for the taxpayer to become compliant, the state will not proceed with the suspension if the taxpayer enters into an Installment Payment Agreement. An IPA permits a taxpayer to pay his outstanding liabilities in full over time, with interest and penalties continuing to accrue. Payments are monthly and by direct debit whenever possible. While an IPA is in effect, other collection action is generally halted.

There may be roadblocks for a taxpayer seeking an IPA quickly so as to avoid having his driver's license suspended. If the outstanding liabilities are based on estimated returns, the taxpayer may need to file all missing returns before the IPA can be considered. It is possible that, as with any other request for an IPA, the state may seek a down payment, or require written financial information about the taxpayer, before making a determination as to whether an IPA should be granted.

For taxpayers who are not able to proceed with an IPA, there may still be a way to avoid the suspension...
of driving privileges. The law provides an exception for taxpayers subject to an income execution for payment of the outstanding taxes. Thus, a taxpayer may be able to consent to a 10% wage garnishment, and keep his driver’s license.

Other provisions soften the application of the law. The taxpayer may be eligible for a restricted use license rather than a suspension in certain circumstances, which may allow the taxpayer to drive to and from work. Commercial driver’s licenses are not subject to suspension under the law. If the taxpayer’s license is suspended, it may be of some comfort to know that insurance companies are specifically prohibited from increasing rates due to a license suspension based on nonpayment of taxes.

It would seem, at first glance, that delinquent taxpayers will also be negatively impacted by another provision in the Budget Bill allowing warrantless income executions. Upon further examination, however, it appears that this change in the law may benefit taxpayers.

Tax warrants are filed routinely by the state for outstanding liabilities, creating a lien and acting as a judgment against the taxpayer. A warrant is filed with the county clerk and with the New York State Department of State, providing notice to the public of the debt. A taxpayer’s credit rating is severely affected by a warrant. Credit reporting agencies may include the details of a warrant for seven years in their reports, even if the warrant was satisfied promptly. Prospective employers may become aware of warrants filed, affecting a taxpayer’s ability to find work, thereby making it more difficult for a taxpayer to satisfy his liabilities.

The state has been restricted in its ability to collect against a taxpayer without filing a warrant. Warrants are a necessary prerequisite for issuing levies or seizing assets. If a taxpayer did not respond to the state’s attempts to contact him and obtain payment, the state had few options other than to file a warrant and proceed with collection. The new law allows the state to take action to collect the debt owed, without the harmful consequences inherent in filing a warrant.

In general, the state has a limited time in which to issue a warrant. If no warrant is filed within six years of the date of assessment of income tax, for example, the debt is extinguished and the state can no longer enforce collection. The state will surely be mindful of these restrictions in determining whether a warrantless income execution is appropriate for a specific taxpayer.

As the state continues to refine its collection procedures, practitioners and taxpayers should be alert to the changing repercussions of failing to pay overdue taxes. Especially when faced with the inconvenience or hardship of not driving legally, taxpayers may reconsider their financial priorities, and practitioners may find that taxpayers are more willing to work with the state to resolve their outstanding liabilities.

By Yvonne R. Cort, Esq.

Yvonne R. Cort is a past Chair of the Tax Law Committee of the Nassau County Bar Association and a past Chair of the IRS Long Island Tax Practitioner Liaison Committee. Yvonne is counsel with the Melville law firm of Karen J. Tenenbaum, PC, www.litaxattorney.com, 631-465-5000, ycort@litaxattorney.com. Her practice focuses on NYS and IRS tax controversies.
NYSSCPA – NASSAU CHAPTER
SMALL FIRM MAP COMMITTEE MEETING

September 20, 2013
Topic: Working With Attorneys – FBARs, Kovels

- Attorney-client privileges and extension to CPA
- Collaboration between attorneys and CPAs
- Third-party privilege
- Privileged information and safeguarding through telephone, faxes, emails, etc.
- FBAR regulations
- Notices issued by FinCen – Financial Crime Enforcement Network
- Filing exemptions – FBAR
- New electronic filing
- Form 8938 requirements
- Offshore voluntary disclosure program
- And more!

Speaker: Neil Katz, Esq.
CPE: Two 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, CFP, CGMA, CFS®, PFS
Eliot Lebenhart, CPA
Kenneth Hauptman, CPA
Alex Resnick, CPA

We look forward to seeing you there!

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

Please note: Meetings are subject to change. Notifications will be sent to all registered attendees via email should this occur.
TECHNICAL MEETINGS SPONSORED BY THE REAL ESTATE COMMITTEE

Negotiating the Commercial Lease - Counseling Your Clients and Maximizing Results

Wednesday, October 16, 2013

Chairpersons: Cynthia Sze, CPA, Vivian Martinez, CPA, and Joel C. Dressner, CPA
Location: Milleridge Inn • 585 Broadway, Jericho, NY 11753 • (516) 931-2201
Designed for: Professionals involved in real estate engagements
Speakers:
David D. Hunt, MCR, CCIM, SIOR President, Hunt Corporate Services, Inc.
Steven E. Cohen, Esq., Partner
Franklin, Gringer, & Cohen, P.C.
Topics: This session will discuss:
• Win-Win negotiations – Why discovery is a critical first start.
• Loss factor and the rubber ruler.
• Discounted cash flow analysis – the ultimate tool for lease analysis.
• Why a lease needs to be reviewed twice.
• “Gotcha” clauses in typical landlord leases.
• The eight most important lease clauses.
Course Level: Basic/Intermediate
Course Code: TBD
CPE Credits: Two

REAL ESTATE COMMITTEE
NASSAU CHAPTER
Wednesday, October 16, 2013
Milleridge Inn • 585 Broadway, Jericho, NY 11753
Joel Dressner, CPA
c/o Gettry Marcus Stern & Lehrer, CPA, P.C.
20 Crossways Park North, Suite 304, Woodbury, NY 11797
jdressner@gmslny.com
Phone (516) 364-3390 ext. 232 • Fax (516) 496-0417

Dear Joel:
☐ I will attend for dinner and the CPE presentation at 6:00 PM and I have enclosed a check for $_________ at $45.00 per person, payable to the NYSSCPA – Nassau Chapter.
☐ I will attend the CPE presentation only at 7:00 PM and I have enclosed a check for $_________ at $20.00 per person, payable to the NYSSCPA – Nassau Chapter
(Please attach a list of names or attach business cards if paying for more than one attendee)
Name:
Firm Affiliation:
Address:
City/State/Zip:
Phone:
Email:

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

Forensic Accounting and Finding Fraud in a Real Estate Engagement

Thursday, September 19, 2013

Chairpersons: Cynthia Sze, CPA, Vivian Martinez, CPA, and Joel C. Dressner, CPA
Location: Milleridge Inn • 585 Broadway, Jericho, NY 11753 • (516) 931-2201
Designed for: Professionals involved in real estate engagements
Speakers:
Mark S. Warshavsky, CPA, ABC, CFE, CVA, CBA, MBA
Gettry Marcus CPA, P.C.
Topics:
Finding fraud and the misappropriation of assets in a real estate engagement.
Course Level: Basic/Intermediate
Course Code: TBD
CPE Credits: Two

REAL ESTATE COMMITTEE
NASSAU CHAPTER
Thursday, September 19, 2013
Milleridge Inn • 585 Broadway, Jericho, NY 11753
Joel Dressner, CPA
c/o Gettry Marcus Stern & Lehrer, CPA, P.C.
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(Please attach a list of names or attach business cards if paying for more than one attendee)
Name:
Firm Affiliation:
Address:
City/State/Zip:
Phone:
Email:

To ensure we have adequate seating, please fax back or mail your reservation as soon as possible. Thank you.
October 18, 2013

Topic: Firm Websites, Newsletters, and Client Communications

- Website
- Search Engine Optimization – Google Analytics
- Social Media – LinkedIn, Facebook, Twitter, etc.
- Advertising – Pay-per-click, Bing, Facebook, etc.
- And more!

Speaker: John Zaher of PRMG

CPE: Two 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, CFP, CGMA, CFS®, PFS
Eliot Lebenthal, CPA
Kenneth Hauptman, CPA
Alex Resnick, CPA

We look forward to seeing you there!

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Please note: Meetings are subject to change. Notifications will be sent to all registered attendees via email should this occur.
JOIN US FOR A SPECTACULAR AFTERNOON OF NETWORKING

FRIDAY, NOVEMBER 15, 2013

**Location:** The Milleridge Inn, Jericho, NY  
**Guest Speakers:** TBD  
**Topic(s):** TBD  
**Agenda:**  
- 12:00 - 12:30 PM: Networking  
- 12:30 - 2:30 PM: Lunch and Presentations  
**Cost:** $35 per person  
**Checks are Payable to:** NYSSCPA - Nassau Chapter  
**Chairpersons:** Christine Hallahan, CPA  
Geri Gregor, CPA  
Toni-Ann Dalton, CPA  
Elizabeth Oberg, CPA

**We look forward to seeing you there!**

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

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**NYSSCPA – NASSAU CHAPTER  
WOMEN’S FOCUS GROUP  
REGISTRATION:**

**FRIDAY, NOVEMBER 15, 2013  
The Milleridge Inn, Jericho, NY**

Kindly email, fax, or mail your response to:  
Elizabeth Oberg, CPA  
Sanders Thaler Viola & Katz, LLP  
350 Jericho Tpke, Suite 1  
Jericho, NY 11753  
Direct: 516-704-7138  
Office: 516-938-5219  
Fax: 516-938-0491  
E-mail: LOberg@st-cpas.com

- [ ] I will attend the luncheon and enclosed is my payment of $35.00
- [ ] I am unable to attend but I am interested in becoming more active within the NYSSCPA Nassau Chapter.

Name: ____________________________________________
Firm Affiliation: ____________________________________
Address: __________________________________________
City/State/Zip: ______________________________________
Phone: _____________________________________________
Cell: ______________________________________________
E-mail: ____________________________________________
CPA Cert #: _________________________________________

Signature: __________________________________________
Date: ______________________________________________
How a Banker Reads Financial Statements

Tuesday, September 24, 2013

Guest Speakers: Bankers from JP Morgan Chase and Suffolk County National Bank

Location: Grassi & Co.
50 Jericho Quadrangle
Jericho, NY 11753

Time: 6:00pm - 6:30 pm Dinner
6:30pm - 8:10 pm Presentation

Course Code: To be obtained

CPE Credits: Two

Cost: $20 for Dinner and CPE Presentation

Topics: How a Banker Reads Financial Statements – A representative from JP Morgan Chase and Suffolk County National Bank will join us to discuss what a bank looks for when reading a financial statement, including liquidity, covenants, footnotes, etc.

Please respond by either faxing me the attached RSVP or emailing me at mcuccia@markspaneth.com

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

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

ACCOUNTING & AUDITING COMMITTEE NASSAU CHAPTER

Tuesday, September 24, 2013
50 Jericho Quadrangle • Jericho, NY 11753

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

☐ I will be attending the September 24, 2013 Dinner and CPE Presentation.
☐ I will not be attending the session but wish to obtain information about future events.

Name: _____________________________
Firm Affiliation: _____________________________
Address: _____________________________
City/State/Zip: _____________________________
Phone: _____________________________
Email: _____________________________
Fax: _____________________________

Save The Date – Topic TBD

Tuesday, October 22, 2013

Guest Speakers: TBD

Location: Berdon LLP
One Jericho Plaza
Jericho, NY 11753

Time: 6:00pm - 6:30 pm Dinner
6:30pm - 8:10 pm Presentation

Course Code: To be obtained

CPE Credits: Two

Cost: $20 for Dinner and CPE Presentation

Topics: TBD

Please respond by either faxing me the attached RSVP or emailing me at mcuccia@markspaneth.com

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

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

ACCOUNTING & AUDITING COMMITTEE NASSAU CHAPTER

Tuesday, October 22, 2013
Berdon LLP • One Jericho Plaza • Jericho, NY 11753

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

☐ I will be attending the October 22, 2013 Dinner and CPE Presentation.
☐ I will not be attending the session but wish to obtain information about future events.

Name: _____________________________
Firm Affiliation: _____________________________
Address: _____________________________
City/State/Zip: _____________________________
Phone: _____________________________
Email: _____________________________
Fax: _____________________________
SAVE THE DATE
Cooperation with Educational Institutions Committee

Mentor a Student Night

Thursday, October 17, 2013
Location: The Chateau in Carle Place
Cocktails: 6:00 PM  Dinner & Meeting: 7:00 PM
Co-chairs: Michael Katz, CPA; Anthony Basile, CPA; and Abby Lucrezia
Registration Fee: $60.00 per person, payable to
The NYSSCPA – Nassau Chapter
Professionals can pay via PayPal at:

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

For Details, Please Contact: Michael Katz or Anthony Basile at
mkatz@st-cpas.com or abasile@basilecpa.com

MENTOR A STUDENT NIGHT
OCTOBER CHAPTER MEETING
Registration Coupon
Thursday, October 17, 2013
The Chateau, Carle Place, NY
6:00 p.m. Cocktails; 7:00 p.m. Dinner & Presentation
Michael Katz
Sanders Thaler Viola & Katz, LLP, 350 Jericho Turnpike
Suite 1, Jericho NY 11753
mkatz@st-cpas.com
Phone (516) 938-5219 • Fax (516) 938-0491

Dear Michael:

☐ I will attend for dinner at 6 PM and have enclosed a check for $25 per person, payable to NYSSCPA Nassau Chapter.

☐ I will attend the CPE presentation at 6:30 PM but will not be having dinner. No payment is enclosed.

Name: ____________________________________________
Firm: ____________________________________________
Address: _________________________________________
City/State/Zip: __________________________________
Phone: __________________________________________
Email: ___________________________________________

Note: R.S.V.P. BY OCTOBER 10, 2013
TO GUARANTEE ADMISSION

Name: ____________________________________________
Firm: ____________________________________________
Address: _________________________________________
City/State/Zip: __________________________________
Phone: __________________________________________
Email: ___________________________________________
Networking with Bankers...

The Suffolk Chapter
Cooperation with Bankers And Other Credit Grantors Committee
invites you to the

Joint Nassau/Suffolk Chapter Meeting:
An Evening of Networking

Wednesday, September 18, 2013

Crest Hollow Country Club
Woodbury, NY

6:00 p.m. – 8:30 p.m.
Networking, cocktails, buffet dinner

$50 in advance
$60 at the door

RSVP REQUIRED by September 13, 2013

Open to all NYSSCPA members, bankers, and other professionals

Please attach a list of names/business cards if paying for more than one attendee:

Name: ____________________________
Firm: ____________________________
Address: ____________________________
City, State, Zip: ____________________________
Telephone: ____________________________
E-mail: ____________________________

I am a member of the □ Nassau □ Suffolk

Please make checks payable to
NYSSCPA Suffolk Chapter and mail to:
Irene Howell
Albrecht, Viggiano, Zureck & Co., PC
25 Suffolk Court
Hauppauge, NY 11788
(631) 434-9500
Fax: (631) 434-9518
ihowell@avz.com
COME JOIN US FOR
AN EVENING OF NETURKEYING
at the Wine & Food Pairing Reception of the Attorneys and Accountants Joint Committee
featuring Long Island’s Finest Restaurants
In Cooperation with NYSSCPA, Nassau & Suffolk Chapters • Nassau & Suffolk County Bar Associations

Tuesday, November 26, 2013 • 6-9 PM

Mail to: Kathleen Becker
Marcum LLP
10 Melville Park Road
Melville, NY 11747
Ph: (631) 414-4404 F: (631) 414-4001
Kathleen.Becker@marcumllp.com

Enclosed is my check for $_______,
at $60 per person, payable to
“NYSSCPA, Nassau Chapter”

Name: _____________________________________________
Firm Affiliation: _____________________________________
Address: ___________________________________________
_________________________________________________________________________________________
Telephone: ________________________________________
Email: _____________________________________________
I am an: ____________ Attorney   ____________ Accountant

DONATIONS OF CANNED GOODS WOULD BE
APPROCIATED FOR ISLAND HARVEST

CONTRIBUTION

 donated at $60 per person, payable to “NYSSCPA, Nassau Chapter”

Name: _____________________________________________
Firm Affiliation: _____________________________________
Address: ___________________________________________
_________________________________________________________________________________________
Telephone: ________________________________________
Email: _____________________________________________
I am an: ____________ Attorney   ____________ Accountant

CO-CHAIRS
Kristina Albarella, CPA
kristina.albarella@marcumllp.com
631-414-4624

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

Christina Yaccarino, CPA, ABV
cyaccarino@gettrymarcus.com
516-364-3390

Neil Katz, Esq.
neilkatz@kbklaw.com
516-364-5100

Christopher Bourell, Esq.
cbourell@litaxattorney.com
631-465-5000

Alan Schwartz, Esq.
alan@ajslaw.com
516-248-6311

Craig S. Wolman, CPA
craig.wolman@janoverllc.com
516-750-6814

PLANNING COMMITTEE

Planning Committee

Jill Scher, Esq.
Jill.scher@kbklaw.com
516-364-5100

Craig S. Wolman, CPA
craig.wolman@janoverllc.com
516-750-6814

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

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

Christina Yaccarino, CPA, ABV
cyaccarino@gettrymarcus.com
516-364-3390

Christopher Bourell, Esq.
cbourell@litaxattorney.com
631-465-5000

Craig S. Wolman, CPA
craig.wolman@janoverllc.com
516-750-6814

UPCOMING MEETINGS
<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Speaker/Moderator</th>
</tr>
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<tbody>
<tr>
<td>September 20, 2013</td>
<td>Working with Attorneys - FBARs, Kovels</td>
<td>Neil Katz, Esq.</td>
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<td>October 18, 2013</td>
<td>Firm Websites, Newsletters and Client Communications</td>
<td>PRMG</td>
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<td>November 15, 2013</td>
<td>iPad Usage and Remote Access</td>
<td>Mark Plostock, CPA</td>
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<td>Michael Glasser of Glasser Tech LLC</td>
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<td>December 20, 2013</td>
<td>Getting Ready for Tax Season</td>
<td>Scott Sanders, CPA, PFS, CFP®, CFS</td>
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<td>Eliot Lebenhart, CPA</td>
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<td>Alex Resnick, CPA</td>
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<td>January 29, 2014</td>
<td>“Loan-Ranger”</td>
<td>Various Bankers**</td>
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<td>Joint Meeting with NCCPAP-N/S Chapter</td>
<td>Scott Sanders, CPA, PFS, CFP®, CFS</td>
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<td>Alex Resnick, CPA</td>
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<td>February 21, 2014</td>
<td>Tax Season Issues – Roundtable Discussion</td>
<td>Scott Sanders, CPA, PFS, CFP®, CFS</td>
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<td>Eliot Lebenhart, CPA</td>
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<td>Alex Resnick, CPA</td>
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<td>March 2014</td>
<td>No Meeting - Tax Season</td>
<td>Scott Sanders, CPA, PFS, CFP®, CFS</td>
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<td>April 17, 2014</td>
<td>Post-Tax Season Issues - Roundtable Discussion</td>
<td>Eliot Lebenhart, CPA</td>
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<td>Kenneth Hauptman, CPA</td>
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<td>Alex Resnick, CPA</td>
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<td>Ira Rosenbloom</td>
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<td>June 19, 2014</td>
<td>How You Define “Running Your Practice”</td>
<td>Scott Sanders, CPA, PFS, CFP®, CFS</td>
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<td>Eliot Lebenhart, CPA</td>
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<td>Alex Resnick, CPA</td>
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</tbody>
</table>

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:
Scott Sanders, CPA, PFS, CFP®, CFS  516 938-5219
Eliot Lebahert, CPA  516 430-5400
Kenneth Hauptman, CPA  516 364-8888
Alex Resnick, CPA  516 364-8888

All meetings are held on Fridays unless otherwise noted.
*Please note, meeting dates, topics and speakers are subject to change.  **Speaker(s) TBD
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 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  ☐ Sponsorship
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☐ CFO & Financial Executives  ☐ Technology
☐ Community Affairs & Public Relations  ☐ Women’s Focus Group
☐ Cooperation with Bankers & Credit Grantors  ☐ Young CPA
☐ Cooperation with Educational Institutions
☐ Estate Planning & Personal Financial Planning
☐ Financial Literacy
☐ Litigation & Forensic Service
☐ Management of Accounting Practice
☐ Medical & Other Professionals
☐ Membership
☐ Newsletter
☐ Practice Continuity
☐ Real Estate
☐ Small Practice MAP
☐ Other ____________________________

Name: ____________________________________________

Firm Affiliation: __________________________________

Address: _________________________________________

City/State/Zip: ____________________________________

Phone: __________________________________________

Email: ___________________________________________  

Please forward your response to:

Phil Kanyuk  
Phone: 631-719-3456 • Fax: 631-719-3353  
Baker Tilly  
125 Baylis Road, Suite 300, Melville, NY 11747.

SAVE THE DATE

2013 HALF-DAY TAX CONFERENCE

Saturday, October 26, 2013

9:00 am – 12:40 pm

Long Island Marriott

Uniondale, New York

Topics include: year-end tax planning, federal tax update, health care, and various New York State tax topics.

SPONSORSHIP

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

EVENT HIGHLIGHTS

60th Annual Installation Dinner

Neil Katz presenting Jack Angel with the Samuel B. Traum award

Scott Sanders presents Lisa Haynie with the Past President award

Neil Korenberg receiving the Distinguished Service award from Neil Katz

Incoming Executive Committee from l to r: Lisa Haynie, Christine Hallahan, Scott Sanders, Lynne Fuentes, Philip Kanyuk, Robert Barnett

Scott Sanders being sworn in by Executive Board Member Eliot Lebenhart

Officers and directors after being sworn in
60th Annual Installation Dinner Sponsors & Advertisers

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• CAPITAL ONE BANK

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• Lynne M. Fuentes, CPA
• Sanders Thaler Viola & Katz, LLP

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• Domenico’s Restaurant
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• Estee Lauder
• Giorgenti - Bestcustomshirt.com
• Girlfriends Feminine Boutique
• Graphic Paper
• Katz Tax Seminar
• Liz Ober, CPA
• Matteo’s Restaurant
• Mulberry Street Pizza
• Nice-N-Pretty Jewelry
• Paul R. Gertelman CPA, PC
• Starbucks
• Tom Evans, JD, MBA - CCH Research and Software

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• Eliot H. Lebenhart CPA PC
• Gettry Marcus CPA, P.C.
• Holtz Rubenstein Remnick
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• CCH - A Wolters Kluwer Business
• Bruno F. Codispoti, Esq.
• Financial Planning Association of Long Island
• Karol Hausman & Sosnik, P.C.
• Karen J. Tenenbaum, P.C.
• Sandra G. Johnson, CPA, P.C.
• Nassau/Suffolk Chapter of NCCPAP
• E-Beam Services, Inc.
• Chuck Robbins
• Christine P. Hallahan, CPA
• SterlingRisk
• Meyer Suozzi English & Klein, P.C.
• Vivian Levy & Family
• Network Capital Services
• Accurate Ingredients
• Corcoran Group Real Estate
• Franchi
• Paul R. Gentleman, CPA, PC
• Sales Tax Defense LLC

Executive Committee and Directors
The NYSSCPA’s Nassau Chapter held its annual Woman’s Focus Group Spring Luncheon on Friday, May 17. With approximately 75 attendees, it was a tremendous success and received positive feedback. The luncheon began with networking, introductions and recognition, particularly to Lisa Haynie, the NYSSCPA’s Past-President, who, in her year of presidency and prior years, has made paramount strides in numerous areas on behalf of the NYSSCPA’s Nassau Chapter. As she eloquently accepted a gift of a bouquet, I only asked that she sit back and smell the roses.

Our first presenter, Audrey Kirwin, spoke on “Fight the Fear – A Real Life Experience & It Could Happen to You.” Audrey had the audience in awe as she shared an experience she encountered which was beyond belief. She followed up with articles on fraud schemes to be aware of, cautionary measures and ways to react in these particular situations.

Debi Silber, “The Mojo Coach,” led the discussion on “Maximizing Your Impact and How to Look, Feel and Live Like a Leader.” Debi was inspirational to all...a true leader, and gave invaluable tips on ways to enhance self-confidence and motivation. Debi is the author of “A Pocket Full of Mojo: 365 Proven Strategies to Create Your Ultimate Body, Mind & Lifestyle.” A copy of her book was handed to each attendee, as well as a free consultation.

Our annual Fall Luncheon, will be held on November 15 at noon at the Milleridge Inn, in Jericho. We are currently seeking our next presentation and hope to see you all there. Please note that your continued support of Dress for Success to help women in need is so much appreciated!

I would like to give a special thanks to Lisa Haynie, Geri Gregor, Toni-Ann Dalton, Elizabeth Oberg, and Tracy Striano for all of your efforts in making this a continued success!

Christine Hallahan, CPA
Castellano, Korenberg & Co., CPAs
313 West Old Country Road
Hicksville, NY
EVENT HIGHLIGHTS

The Ellen Gordon Run/Walk

From left to right: Michael Rubenstein, Ray Foch, Roy Massa, David Gordon, Scott Sanders

Participants at the starting line

From left to right: Michael Rubenstein, Ray Foch, Roy Massa, David Gordon, Scott Sanders
EVENT HIGHLIGHTS

116th Annual NYSSCPA Installation Dinner on May 16th

J. Michael Kirkland, Scott Sanders, Robert Schaffer, and Lisa Haynie

Mark Meinberg and Michael Borsuk

Scott Sanders, Robert Schaffer, Michael Borsuk, and Robert Barnett

J. Michael Kirkland, Joanne Barry, Michael Gaines, and Allan Weiner

Scott Sanders, Lisa Haynie, Michael Borsuk, and Robert Schaffer

Gail Kinsella, Lisa Haynie, and Joanne Barry
# CALENDAR OF EVENTS

## Accounting & Auditing
Jeffrey Yonkers, Mark Goldschmitt, Mark Cuccia, Marci Greenfield, Joel Reisman

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<td>Tuesday 24th</td>
<td>Tuesday 22nd</td>
<td>Saturday 2nd</td>
<td>Tuesday 3rd</td>
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<tr>
<td>How a Banker Reads</td>
<td>Topic TBD</td>
<td>9:00 AM - 5:00 PM</td>
<td>General A&amp;A Update</td>
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<tr>
<td>Financial Statements</td>
<td>6:00 PM - 8:10 PM</td>
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<td>MP&amp;S</td>
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<td>Grassi</td>
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## Attorney & Accountant Joint Committee
Kristina Albarella, Jill Scher

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<tbody>
<tr>
<td>Tuesday 26th</td>
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<tr>
<td>Attorney &amp; Accountant</td>
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<td>Carlyle at The Palace</td>
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<tr>
<td>Wednesday 25th</td>
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<tr>
<td>Tax Update</td>
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<tr>
<td>(including residency issues)</td>
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<tr>
<td>Meltzer Lippe</td>
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## CFO & Financial Executives
Anthony Aronica, Manilo Cafiero

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<td>Wednesday 25th</td>
<td>Tuesday 22nd</td>
<td>Tuesday 19th</td>
<td>Tuesday 17th</td>
<td>Wednesday 22nd</td>
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<tr>
<td>Tax Update</td>
<td>Topic GAAP &amp; Private Company</td>
<td>Corporate Governance</td>
<td>WISP (Written Information</td>
<td>Retirement Income Planning</td>
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<tr>
<td>(including residency issues)</td>
<td>Issues</td>
<td>Meltzer Lippe</td>
<td>Security Plans)</td>
<td>(emphasis on Annuities &amp;</td>
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<tr>
<td>Meltzer Lippe</td>
<td>Meltzer Lippe</td>
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<td>Meltzer Lippe</td>
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## Chapter Meetings

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<tbody>
<tr>
<td>Wednesday 18th</td>
<td>Thursday 17th</td>
<td>Tuesday 26th</td>
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<tr>
<td>Jt. Nassau/Suffolk</td>
<td>Student Night</td>
<td>Attorney &amp; Accountant</td>
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<tr>
<td>Cooperation w/Bankers</td>
<td>Chateau Briand</td>
<td>Carlyle at The Palace</td>
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<tr>
<td>Crest Hollow Country Club</td>
<td>6:00 PM - 8:30 PM</td>
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## February 2014

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<tbody>
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<td>Tuesday 25th</td>
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<td>Tuesday 22nd</td>
<td>Tuesday 20th</td>
<td>Tuesday 10th</td>
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<tr>
<td>LinkedIn for CFOs</td>
<td>Commercial Insurance Update</td>
<td>PEOs and Self Insurance</td>
<td>CFO Best Practices</td>
<td>Planning 2014-2015</td>
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<tr>
<td>&amp; Controllers</td>
<td>(Market Trends Business</td>
<td>Meltzer Lippe</td>
<td>Meltzer Lippe</td>
<td>Meltzer Lippe</td>
</tr>
<tr>
<td>Meltzer Lippe</td>
<td>Interruption Coverage)</td>
<td>8:00 AM - 10:00 AM</td>
<td>8:00 AM - 10:00 AM</td>
<td>8:00 AM - 10:00 AM</td>
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<tr>
<td>Jt. With Suffolk Chapter</td>
<td>8:00 AM - 10:00 AM</td>
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## February 2014

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<tbody>
<tr>
<td>Thursday 8th</td>
<td>Thursday 8th</td>
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<tr>
<td>61st Installation Dinner</td>
<td>Chateau Briand</td>
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<td>6:00 PM - 11:00 PM</td>
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### Community Affairs & Public Relations
Pending

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<tbody>
<tr>
<td></td>
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<td></td>
<td>Saturday 14th Ellen Gordon 5K Walk/Run Eisenhower Park 7:30 AM (Registration)</td>
</tr>
</tbody>
</table>

### Cooperation with Bankers & Credit Grantors
Neal Korenberg

|-----------|----------|----------|----------|----------|
| Wednesday 18th |          |          |          | October 30th  
Jt. Nassau/Suffolk  
Cooperation w/ Bankers  
Crest Hollow Country Club  
6:00 PM - 8:30 PM |

### Cooperation for Educational Institutions
Anthony Basile, Michael Katz, Abby Lucrezia

|-----------|----------|----------|----------|----------|
| Thursday 17th  
Student Night  
Chateau Briand  
6:00 PM - 8:30 PM |

### Estate Planning & Personal Financial Planning
Christine Hallahan, Eric Kramer, Scott Sanders

|-----------|----------|----------|----------|----------|
| Wednesday 25th  
Jt. w/ Taxation  
Foreign Reporting  
Asset Protection  
6:00 PM - 8:00 PM |
| Wednesday 23rd  
IRA Beneficiary Designation  
6:00 PM - 8:00 PM |
| Wednesday 13th  
Estate Litigation & Audit Triggers  
6:00 PM - 8:00 PM |
| Saturday 11th  
All-Day Conference  
9:00 AM - 5:00 PM |

### Financial Literacy Committee
Karen Tenenbaum, Cynthia Sze, Tim Coville, Justine DeVito Tenney

|-----------|----------|----------|----------|----------|
| Friday 27th  
Marks Paneth & Shron  
8:00 AM - 10:00 AM |
| Thursday 31st  
Marks Paneth & Shron  
8:00 AM - 10:00 AM |
| Thursday 14th  
Marks Paneth & Shron  
8:00 AM - 10:00 AM |
| Thursday 5th  
Marks Paneth & Shron  
8:00 AM - 10:00 AM |
| Thursday 16th  
WeiserMazars  
8:00 AM - 10:00 AM |

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<th>Feb 2014</th>
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</table>
| Thursday 13th  
WeiserMazars  
8:00 AM - 10:00 AM |
| Thursday 20th  
WeiserMazars  
8:00 AM - 10:00 AM |
| Thursday 24th  
Marks Paneth & Shron  
8:00 AM - 10:00 AM |
| Thursday 1st  
8:00 AM - 10:00 AM  
TBD  
Saturday 3rd  
Financial Literacy Fair |
## Taxation Committee
Robert Schaffer, Robert Barnett, Iola Damante

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<tbody>
<tr>
<td>Wednesday 25th</td>
<td>Saturday 26th</td>
<td>Thursday 14th</td>
<td>Saturday 7th and Sunday 8th&lt;br&gt;Buying &amp; Selling LLC Interests, Residency, Federal &amp; State Tax Update, Estate Planning/Retirement, Repair &amp; Capitalization, Day Trader/Gaming, Foreign Reporting&lt;br&gt;9:00 AM - 5:00 PM</td>
<td>Tuesday 21st&lt;br&gt;Tax Credits&lt;br&gt;8:00 AM - 10:00 AM</td>
</tr>
<tr>
<td>Jt Meeting w/Estate &amp; PFP&lt;br&gt;Foreign Reporting &amp; Asset Protection&lt;br&gt;6:00 PM - 8:00 PM</td>
<td>Federal &amp; State Update, Affordable Care Act, Year-End Planning&lt;br&gt;9:00 AM - 1:00 PM</td>
<td>Jt w/ Real Estate Interest Tracing Rules&lt;br&gt;6:00 PM - 8:00 PM</td>
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**Feb 2014**  **March 2014**  **April 2014**  **May 2014**  **June 2014**  

### Practice Continuity
Craig Morris, Anthony Basile, Larry Bloom, Eliot Lebenchart

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<td>Friday 20th</td>
<td>Friday 29th</td>
<td>Friday 24th</td>
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<tr>
<td>Human Resources as a Solution to CPA Succession&lt;br&gt;8:00 AM - 10:00 AM</td>
<td>Structual, Tax, and Contractual Details in Succession Arrangements&lt;br&gt;8:00 AM - 10:00 AM</td>
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**Feb 2014**  **March 2014**  **April 2014**  **May 2014**  **June 2014**  

### Real Estate
Joel Dressner, Cynthia Sze, Vivian Martinez

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<tr>
<td>Thursday 19th&lt;br&gt;Forensic Accounting &amp; Finding Fraud in a Real Estate Engagement&lt;br&gt;The Milleridge Inn&lt;br&gt;6:00 PM - 8:00 PM</td>
<td>Wednesday 16th&lt;br&gt;Negotiating the Commercial Lease - Counseling Your Clients &amp; Maximizing Results&lt;br&gt;The Milleridge Inn&lt;br&gt;6:00 PM - 8:00 PM</td>
<td>Thursday 14th&lt;br&gt;Jt. with Taxation&lt;br&gt;6:00 PM - 8:00 PM</td>
<td>Wednesday 4th&lt;br&gt;Jt. with Taxation&lt;br&gt;6:00 PM - 8:00 PM</td>
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**Feb 2014**  **March 2014**  **April 2014**  **May 2014**  **June 2014**  

### Small Firm MAP
Scott Sanders, Eliot Lebenchart, Kenneth Hauptman, Alex Resnick

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<tr>
<td>Friday 20th&lt;br&gt;Working With Attorneys On Parade Diner&lt;br&gt;8:00 AM - 10:00 AM</td>
<td>Friday 18th&lt;br&gt;Firm Websites, Newsletters, Client Communications On Parade Diner&lt;br&gt;8:00 AM - 10:00 AM</td>
<td>Friday 15th&lt;br&gt;iPad Usage and Remote Access On Parade Diner&lt;br&gt;8:00 AM - 10:00 AM</td>
<td>Friday 20th&lt;br&gt;Getting Ready for Tax Season On Parade Diner&lt;br&gt;8:00 AM - 10:00 AM</td>
<td>Wednesday 29th&lt;br&gt;“Loan-Ranger”&lt;br&gt;Jt. w/ NCCPAP-N/S Chapter On Parade Diner&lt;br&gt;8:00 AM - 10:00 AM</td>
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**Feb 2014**  **March 2014**  **April 2014**  **May 2014**  **June 2014**  

- *NO MEETING TAX SEASON*
CALENDAR OF EVENTS

Sponsorship Committee
Scott Sanders, Howard Fine

Technology
Mark Plostock

Women’s Focus Group
Christine Hallahan, Geri Gregor, Toni-Ann Dalton, Elizabeth Oberg

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<td>Friday 15th</td>
<td>Milleridge Inn</td>
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Young CPAs
Joshua Schecter, Carmelina Hernandez, Bruce LaMarca

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<td>Tuesday 13th</td>
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Litigation & Forensic Services
Nannette Watts, John Spatola

Management of Accounting Practices
Louis Grassi

Medical & Other Professionals
Neal Gruber

Membership
John Pellitteri

Newsletter
Michael Gaines, Lynne Fuentes, Lisa Haynie, Edwin Kleigman
### EXECUTIVE COMMITTEE

**PRESIDENT**

Scott Sanders, CPA  
Sanders Thaler Viola & Katz, LLP  
350 Jericho Turnpike, Suite 1  
Jericho, NY 11753-1317  
516-938-5219  
ssanders@st-cpas.com

**PRESIDENT-ELECT**

Robert S. Barnett, Esq., CPA  
Capell Barnett Matalon & Schoenfeld  
100 Jericho Quadrangle  
Ste 233  
Jericho, NY 11753  
516-931-8100  
rbarnett@cbmslaw.com

**VICE PRESIDENT**

Philip H. Kanyuk, CPA  
Baker Tilly Virchow Krause, LLP  
125 Baylis Road, Ste. 300  
Melville, NY 11747  
631-719-3456  
philip.kanyuk@bakertilly.com

**TREASURER**

Lynne M. Fuentes, CPA  
307-10 Hicksville Road  
Bethpage, NY 11714  
516-622-3045  
LynneFuentes@optonline.net

**SECRETARY**

Christine P. Hallahan, CPA  
Castellano, Korenberg & Co, CPAs  
313 West Old Country Road  
Hicksville, NY 11801  
516-937-9500  
challahanc@ck-co.com

**PAST PRESIDENT**

Lisa Haynie, CPA  
Katz Bernstein & Katz, LLP  
6900 Jericho Turnpike  
Suite 100W  
Syosset, NY 11791  
516-364-5100  
lisahaynie@kbktaxlaw.com

### DIRECTORS

**Alex Resnick, CPA**  
Wild Maney & Resnick, LLP  
20 Crossways Park North  
Woodbury, NY 11797  
516-938-1040  
aresnick@wmrcpa.com

**Anthony Aronica, CPA**  
Graphic Paper, Inc.  
31 Windsor Place  
Central Islip, NY 11772  
631-964-8225  
aaronica@graphicpaper.com

**Eliot Lebehart, CPA**  
Eliot H. Lebehart CPA, PC  
131 Sunnyside Blvd, Suite 106  
Plainview, NY 11803  
516-430-5400  
eliot@ehlcpa.com

**Howard H. Fine, CPA**  
Gettry Marcus, CPA, P.C.  
20 Crossways Park North  
Woodbury, NY 11797  
516-364-3900 x212  
hfine@gettrymarcus.com

**Anthony Basile, CPA**  
Anthony Basile CPA, PC  
401 Franklin Avenue - Ste 105  
Garden City, NY 11530  
516-741-5100  
abasile@basilecpa.com

**Geri Gregor, CPA**  
Grassi & Co., CPAs  
50 Jericho Quadrangle  
Jericho, NY 11753  
516-336-2496  
ggregor@grassicpas.com

**Joel Dressner, CPA**  
Gettry Marcus, CPA, P.C.  
20 Crossways Park  
Woodbury, NY 11797  
516-364-3900 x232  
jdressner@gettrymarcus.com

**Cynthia Sze, CPA**  
Marks Paneth & Shron, LLP  
88 Froehlich Farm Boulevard  
Woodbury, NY 11797  
516-992-5738  
CSze@markspaneth.com

### ATTORNEY & ACCOUNTANTS

**Kristina Albarella, CPA**  
Marcum LLP  
10 Melville Park Road  
Melville, NY 11747  
631-414-4624  
kristina.albarella@marcumllp.com

**Jill Scher, CPA**  
Gettry Marcus, CPA, P.C.  
20 Crossways Park North  
Woodbury, NY 11797  
516-364-3390 ext 144  
Jscher@gettrymarcus.com

### ACCOUNTING & AUDITING

**Jeffrey Yonkers, CPA**  
Grassi & Co., CPAs  
50 Jericho Quadrangle  
Jericho, NY 11753  
516-256-3500  
jyonkers@grassicpas.com

**Mark Goldschmitt, CPA**  
MayerMeinberg, LLP  
6900 Jericho Turnpike, Suite 312  
Syosset, NY 11791  
516-921-8900  
mgoldschmitt@mayermeinberg.com

**Mark R. Cuccia, CPA**  
Marks Paneth & Shron, LLP  
88 Froehlich Farm Blvd.  
Woodbury, NY 11797  
516-992-5908  
mucccia@markspaneth.com

**Marcy Greenfield, CPA**  
Berdon, LLP  
1 Jericho Plaza  
Jericho, NY 11753  
516-931-3100  
mgreenfield@berdonllp.com

**Joel Reisman, CPA**  
Sanders Thaler Viola & Katz, LLP  
350 Jericho Turnpike, Suite 1  
Jericho, NY 11753-1317  
516-938-3219  
jreisman@st-cpas.com
<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>Address</th>
<th>Phone</th>
<th>Email</th>
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</thead>
<tbody>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Manilo Cafiero, CPA</td>
<td>110 Voice Road, Carle Place, NY 11514</td>
<td>516-248-9096 x 2614</td>
<td><a href="mailto:mcafiero@scaleair.com">mcafiero@scaleair.com</a></td>
</tr>
<tr>
<td></td>
<td>Anthony Aronica, CPA</td>
<td>Graphic Paper, Inc., 31 Windsor Place, Central Islip, NY 11772</td>
<td>631-964-8225</td>
<td><a href="mailto:aaronica@graphicpaper.com">aaronica@graphicpaper.com</a></td>
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<tr>
<td>CFO &amp; Financial Executives</td>
<td>Neal Korenberg, CPA</td>
<td>Castellano Korenberg &amp; Co., CPAs, 313 West Old Country Road, Hicksville, NY 11801</td>
<td>516-937-9500</td>
<td><a href="mailto:nkorenberg@ck-co.com">nkorenberg@ck-co.com</a></td>
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<td>Christine P. Hallahan, CPA</td>
<td>Castellano, Korenberg &amp; Co, CPAs, 313 West Old Country Road, Hicksville, NY 11801</td>
<td></td>
<td><a href="mailto:challahan@ck-co.com">challahan@ck-co.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Eric M. Kramer, CPA, Esq.</td>
<td>Farrell Fritz, PC, 1320 RXR Plaza, Uniondale, NY 11566</td>
<td>516-281-9190</td>
<td><a href="mailto:ekramer@farrellfritz.com">ekramer@farrellfritz.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Scott Sanders, CPA</td>
<td>Sanders Thaler Viola &amp; Katz, LLP, 350 Jericho Turnpike, Suite 1, Jericho, NY 11753</td>
<td></td>
<td><a href="mailto:sanders@st-cpas.com">sanders@st-cpas.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Neal Guber, CPA</td>
<td>WeiserMazars, LLP, 60 Crossways Park Drive West, Ste. 301, Woodbury, NY 11797</td>
<td>516-620-8500</td>
<td><a href="mailto:neal.guber@weisermazars.com">neal.guber@weisermazars.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Cynthia Sze, CPA</td>
<td>Marks Paneth &amp; Shron, LLP, 88 Froehlich Farm Blvd, Woodbury, NY 11797</td>
<td>516-992-5738</td>
<td><a href="mailto:csze@markspaneth.com">csze@markspaneth.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Timothy Coville, CPA</td>
<td>St John's University, 8000 Utopia Parkway, Bent Hall, Room 357, Queens, NY 11439</td>
<td>516-650-6028</td>
<td><a href="mailto:covillet@stjohns.edu">covillet@stjohns.edu</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Justine DeVito Tenney, CPA</td>
<td>WeiserMazars, 60 Crossway Park Drive West, Suite 301, Woodbury, NY 11797</td>
<td>516-488-1200</td>
<td><a href="mailto:justine.tenney@weisermazars.com">justine.tenney@weisermazars.com</a></td>
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<td>CFO &amp; Financial Executives</td>
<td>John M. Spatola, CPA</td>
<td>Nawrocki, Smith, LLP, 290 Broadhollow Road, Ste. 115E, Melville, NY 11747</td>
<td></td>
<td><a href="mailto:jspatola@nssllpcpa.com">jspatola@nssllpcpa.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Nanette Watts, CPA</td>
<td>Nawrocki, Smith, LLP, 290 Broadhollow Road, Ste. 115E, Melville, NY 11747</td>
<td></td>
<td><a href="mailto:nwatts@nssllpcpa.com">nwatts@nssllpcpa.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>John P. Pellitteri, CPA</td>
<td>Grassi &amp; Co., CPAs, 50 Jericho Quadrangle, Jericho, NY 11753</td>
<td>516-256-3500</td>
<td><a href="mailto:johnp@grassicpas.com">johnp@grassicpas.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Neal Guber, CPA</td>
<td>WeiserMazars, LLP, 60 Crossways Park Drive West, Ste. 301, Woodbury, NY 11797</td>
<td>516-620-8500</td>
<td><a href="mailto:neal.guber@weisermazars.com">neal.guber@weisermazars.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Neal Guber, CPA</td>
<td>WeiserMazars, LLP, 60 Crossways Park Drive West, Ste. 301, Woodbury, NY 11797</td>
<td>516-620-8500</td>
<td><a href="mailto:neal.guber@weisermazars.com">neal.guber@weisermazars.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Louis Grassi, CPA</td>
<td>Grassi &amp; Co., CPAs, 50 Jericho Quadrangle, Jericho, NY 11753</td>
<td>516-256-3500</td>
<td><a href="mailto:lgrassi@grassicpas.com">lgrassi@grassicpas.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Lynne M. Fuentes, CPA</td>
<td>Friedman LLP, 50 Charles Lindbergh Blvd, Uniondale, NY 11553</td>
<td>516-281-9190</td>
<td><a href="mailto:mgaines@friedmanllp.com">mgaines@friedmanllp.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Lisa Haynie, CPA</td>
<td>Katz Bernstein &amp; Katz, LLP, 6900 Jericho Turnpike, Suite 100W, Syosset, NY 11791</td>
<td>516-364-5100</td>
<td><a href="mailto:lishaynie@kbktaxlaw.com">lishaynie@kbktaxlaw.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Edwin J. Kleinman, CPA</td>
<td>78 Harbor Lane, Massapequa Park, NY 11762</td>
<td>516-541-1145</td>
<td><a href="mailto:ejkcpa@yahoo.com">ejkcpa@yahoo.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Mark L. Meinberg, CPA</td>
<td>Mayer Meinberg, LLP, 6900 Jericho Tpke., Ste. 312, Syosset, NY 11791</td>
<td>516-921-8900</td>
<td><a href="mailto:mmeinberg@mayermeinberg.com">mmeinberg@mayermeinberg.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Michael Gaines, CPA</td>
<td>Friedman LLP, 50 Charles Lindbergh Blvd, Uniondale, NY 11553</td>
<td>516-281-9190</td>
<td><a href="mailto:mgaines@friedmanllp.com">mgaines@friedmanllp.com</a></td>
</tr>
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<td>Edwin J. Kleinman, CPA</td>
<td>78 Harbor Lane, Massapequa Park, NY 11762</td>
<td>516-541-1145</td>
<td><a href="mailto:ejkcpa@yahoo.com">ejkcpa@yahoo.com</a></td>
</tr>
<tr>
<td>CFO &amp; Financial Executives</td>
<td>Abby Lucrezia, CPA</td>
<td>Loeb &amp; Troper, LLP, 655 3rd Avenue, New York, NY 10017</td>
<td>646-253-5267</td>
<td><a href="mailto:alucrezia@loebbandtroper.com">alucrezia@loebbandtroper.com</a></td>
</tr>
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<td>CFO &amp; Financial Executives</td>
<td>Edwin J. Kleinman, CPA</td>
<td>78 Harbor Lane, Massapequa Park, NY 11762</td>
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<td>Loeb &amp; Troper, LLP, 655 3rd Avenue, New York, NY 10017</td>
<td>646-253-5267</td>
<td><a href="mailto:alucrezia@loebbandtroper.com">alucrezia@loebbandtroper.com</a></td>
</tr>
</tbody>
</table>
PRACTICE CONTINUITY

Eliot Lebenhart, CPA
Eliot H. Lebenhart CPA, PC
131 Sunnyside Blvd, Suite 106
Plainview, NY 11803
516-430-5400
eliot@ehlcpa.com

Craig Morris, CPA
Craig Morris & Company
356 South Oyster Bay Road
Syosset, NY 11791
516-681-1121
craig@cmcocpas.com

Larry Bloom, CPA
Katz, Bloom & Schon CPAs LLC
500 North Broadway, Ste. 105
Jericho, NY 11753
516-741-5100
labloom@basilecpa.com

REAL ESTATE

Cynthia Sze, CPA
Marks Paneth & Shron LLP
88 Froehlich Farm Boulevard
Woodbury, NY 11797
516-992-5738
CSze@markspaneth.com

Joel Dressner, CPA
Gettry, Marcus, CPA, P.C.
20 Crossways Park
Woodbury, NY 11797
516-364-3390 x232
jdressner@gettrymarcus.com

Vivian Martinez, CPA
Marks, Paneth & Shron
88 Froehlich Farm Blvd.
Woodbury, NY 11797
516-992-5776
vmartinez@markspaneth.com

TECHNOLOGY COMMITTEE

Mark Plostock, CPA
5 Lincrest Street
Syosset, NY 11791-6823
516-933-8100
mplostock@nysscpa.org

SMALL PRACTICE UNIT MAP

Eliot Lebenhart, CPA
Eliot H. Lebenhart CPA, PC
131 Sunnyside Blvd, Suite 106
Plainview, NY 11803
516-430-5400
eliot@ehlcpa.com

Kenneth Hauptman, CPA
Wild, Maney & Resnick, LLP
20 Crossways Park North, Ste. 412
Woodbury, NY 11797
516-364-8888
khaauptman@wmrcpa.com

Scott Sanders, CPA
Sanders Thaler Viola & Katz, LLP
350 Jericho Turnpike, Suite 1
Jericho, NY 11753-1317
516-938-5219
ssanders@st-cpas.com

Alex Resnick, CPA
Wild Maney & Resnick, LLP
20 Crossways Park North
Woodbury, NY 11797
516-938-1040
aresnick@wmrcpa.com

WOMEN’S FOCUS GROUP

Christine P. Hallahan, CPA
Castellanos, Korenberg & Co, CPAs
313 West Old Country Road
Hicksville, NY 11801
516-937-9500
challahan@ck-co.com

Geri Gregor, CPA
Grassi & Co., CPAs
50 Jericho Quadrangle
Jericho, NY 11753
516-336-2496
ggregor@grassicpas.com

Toni-Ann Dalton, CPA
Sanders Thaler Viola & Katz, LLP
350 Jericho Turnpike, Suite 1
Jericho, NY 11753-1317
516-938-5219
tdalton@st-cpas.com

Elizabeth Oberg, CPA
Sanders Thaler Viola & Katz, LLP
350 Jericho Turnpike, Suite 1
Jericho, NY 11753-1317
516-938-5219
loberg@st-cpas.com

SPONSORSHIP COMMITTEE

Scott Sanders, CPA
Sanders Thaler Viola & Katz, LLP
350 Jericho Turnpike, Suite 1
Jericho, NY 11753-1317
516-938-5219
ssanders@st-cpas.com

Howard Fine, CPA
Gettry Marcus, CPA, P.C.
20 Crossways Park North
Woodbury, NY 11797
516-364-3390 x212
hfine@gettrymarcus.com

TAXATION COMMITTEE

Robert J. Schaffer, CPA
Castellanos Korenberg & Co., CPAs
313 West Old Country Road
Hicksville, NY 11801
516-937-9500 x331
rschaffer@ck-co.com

Robert Barnett, Esq. CPA
Capell, Barnett, Matalon & Schoenfeld
100 Jericho Quadrangle, Ste. 233
Jericho, NY 11753
516-931-8100
rbarnett@cbmslaw.com

Iola Damante, CPA
Grassi & Co., CPAs
50 Jericho Quadrangle, Suite 200
Jericho, NY 11753
516-256-3500
idamante@grassicpas.com

YOUNG CPAs

Joshua S. Sechter, CPA
Baker Tilly Virchow Krause, LLP
125 Baylis Road - Suite 300
Melville, NY 11747
631-752-7400 X357
joshua.sechter@bakertilly.com

Bruce A. LaMarca
Sanders Thaler Viola & Katz, LLP
350 Jericho Turnpike, Suite 1
Jericho, NY 11753-1317
516-938-5219
blamare@st-cpas.com

Carmelina Hernandez, CPA
Marks Paneth & Shron, LLP
88 Froehlich Farm Blvd.
Woodbury, NY 11797
516-992-5876
chernandez@markspaneth.com
INFORMATION AND HOTLINES

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

**General:**
- Robert S. Barnett, Esq., CPA (516) 931-8100
- Jack Angel, CPA (516) 487-1494
- Robert Lusthaus, CPA, Esq. (516) 937-1366
- Karen J. Tenenbaum, Esq. LLM (Tax), CPA (IRS & NYS) (631) 465-5000
- Robert J. Schaffer, CPA (516) 937-9500

**Taxing Authorities**
- Ruth Sattig Betz, CPA (NYSS) (516) 249-1919
- 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

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The Public Relations and Marketing Group
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**Lynne M. Fuentes, CPA**
307-10 Hicksville Rd.
Bethpage, NY 11714

**Michael Gaines, CPA**
Friedman LLP
50 Charles Lindbergh Blvd., Suite 510
Uniondale, NY 11553

**Lisa Haynie, CPA**
Katz Bernstein & Katz, LLP
6900 Jericho Turnpike, Suite 100 W
Syosset, NY 11791

**Edwin Kleigman, CPA**
78 Harbor Lane.
Massapequa Park, NY 11762

**Shannon Stevens**
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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<table>
<thead>
<tr>
<th>Newsletter Issue</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>December 10th</td>
</tr>
<tr>
<td>April</td>
<td>March 10th</td>
</tr>
<tr>
<td>May</td>
<td>April 10th</td>
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<tr>
<td>September</td>
<td>August 10th</td>
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<td>October</td>
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<td>November</td>
<td>October 10th</td>
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<tr>
<td>December</td>
<td>November 10th</td>
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