The New York State Society of Certified Public Accountants

Westchester Chapter
E-Newsletter

April 2014

14th Annual NYSSCPA Westchester Chapter Estate, Tax and Financial Planning Conference

When: May 5, 2014
Time: 8:30 a.m. - 5:00 p.m.
(check-in at 8:15 a.m.)
Location: Citibank Executive Planning Center
188 King St
Armonk, NY
Cost: $135.00 members
$175.00 non-members
Course code: 28611433

8 CPE credits offered (taxation)

Register online at: http://www.nysscpa.org/epass/Meetings/Meeting.aspx?ID=23461
or call 800-537-3635.

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Dear Westchester Chapter Members,

This is a very busy time for our profession. As busy as we all have been, the Westchester Chapter has successfully maintained a number of events and has not lost sight on our commitment to our chapter and chapter members even during our busiest time.

The Westchester Chapter of the NYSSCPA has formed a team for the April 27th, 2014 March of Dimes March for Babies Walk-a-Thon. We invite you to join our team, help us reach our fundraising goal and walk with us on March for Babies day. If you can’t walk with us, please consider supporting us with a secure online donation. Every day, thousands of babies are born too soon and often very sick. To join our team or support this great cause, please log on to http://www.marchforbabies.org/team/t2178226.

In a few short months, we will be hosting our Presidents Dinner. It will be held at the Willow Ridge Country Club located at 123 North Street in Harrison NY from 6 p.m. - 9 p.m. It is at this dinner that I will be introducing you to our chapter’s incoming President William Zeboris and our 2014-2015 board members. I encourage you all to attend. Please contact Denise Stefano for more information and/or to register at: dstefano@mercy.edu or (914) 674-7779.

Additionally, at this dinner we present, along with several other awards, our annual scholarships. The filing deadline for applications is April 23rd. The Westchester Chapter has been awarding scholarships to deserving Westchester high school seniors for over ten years. Anyone knowing a Westchester high school senior who intends to major in accounting should have them contact their guidance counselor for more details or can contact Mark Leeds at (914) 468-7313.
I wish you a successful remaining busy season. Please mark your calendars with the upcoming events and dates:

April 17th, 2014 - Board Meeting, Crowne Plaza, 7:30 a.m.
April 27th, 2014 - March of Dimes March for Babies, Saxon Woods Pool, White Plains, check in 9:00 a.m.
April 29th, 2014 - Allied Professionals Networking Breakfast - How to use LinkedIn, Doral Arrowwood, 7:30 a.m. - 9:30 a.m.
April 30th 2014 - CPA Examination Overview - Crowne Plaza, 5:30 p.m. - 8:00 p.m.
May 5th, 2014 - Estate and Financial Planning Conference, Citigroup Conference Center, Armonk, NY, All Day Conference, 8 CPE credits
May 13th, 2014 - Annual Golf Outing and Networking Event, Glen Arbor Golf Club, Bedford Hills, Sign in starts at 11:00 a.m.
May 15th, 2014 - Young CPA Wine Tasting Event to benefit Blythedale's Children Hospital, Willow Ridge Country Club, 5:30 p.m. - 8:00 p.m.
May 20th, 2014 - Young Professional Networking Reception - Life...the place to be, Ardsley, 5:30 p.m. - 7:30 p.m.
May 21st 2014 - President's Dinner and Scholarships Presentation, Willow Ridge Country Club, Harrison, NY, 6:00 p.m. - 9:00 p.m.
June 8-10 and June 15-17, 2014 - Young CPAs Conference, 2014 Next Gen, two locations: Huntington, NY and Rochester, NY

Regards,
Gina

Gina can be reached at: 914-949-2990 or by email at: glinss@citrincooperman.com
The Allied Professionals Networking Breakfast

Has Been Rescheduled

For Tuesday, April 29, 2014 from 7:30 a.m. to 9:30 a.m.

(Head Shot Photos available starting at 7:00 a.m.)

The Allied Professionals

of

The FPA Greater Hudson Valley Chapter
the Westchester Chapter of the New York State Society of CPAs
& the Westchester County Bar Association

invite you
to join us for an Allied Professionals Interactive Networking Breakfast

Topic:

*How to use LinkedIn - Applications and Strategies*

- What Social Media is, what it is not
- How LinkedIn fits into the Social Media spectrum
- How LinkedIn works - its features and capabilities
- Practical business applications and marketing strategies
- FINRA Regulations
- Optional features available
- How to develop an action plan and strategy

Don't miss this incredible opportunity to get practical and strategic advice from an industry expert. Jared Trexler is the marketing and media manager for Ed Slott and Company and will give you practical instructions that you won't get anywhere else.
We are also offering complimentary headshot photos before the event.
Photos available prior to the session starting at 7:00 a.m.

WHEN: Tuesday, April 29th, 2014
TIME: 7:30 a.m. to 9:30 a.m.
WHERE: Doral Arrowwood (Hudson Room)
        Anderson Hill Road, Rye Brook, NY

1 CPE CREDIT OFFERED
$35.00 per person
COURSE CODE: 29115406

For NYSSCPA Registration Please E-mail:
Amy Amodeo at rle@ecker-law.com
or call (914) 273-0777

For FPA Registration Please E-mail:
Marcia Kaplan, CFP at marcia.s.kaplan@ampf.com

For WCBA Registration Please E-mail:
Luis Rivera, Esq. at cle@wcbany.org

A great opportunity for company executives, marketing managers and
potential internet gurus!
Bring along a young person from your organization who is comfortable with
social media to assist you in implementing your strategy.
The NYSSCPA Westchester Chapter
Presents:

“Everything You Need to Know About the CPA Examination and More”

with guest speaker, Phil Anthony of the Wiley CPAexcel Review Program

This comprehensive program will cover a host of CPA Examination topics including:

- An overview of the content and functionality of the CPA Examination
- Registering for licensure and applying to take the examination
- Test-taking strategies
- Task-based simulation problem response demonstration

…and more, including the raffle of a full, 4-part, Wiley CPAexcel review course!

This event is being provided “free of charge,” so please reserve your space now as seating is limited! Refreshments will be served!

Date: Wednesday, April 30, 2013
Location: Crowne Plaza Hotel, 66 Hale Avenue, White Plains, NY
Time: 5:30 p.m. – 8:00 p.m.
Registration & Refreshments: Begin 5:30 p.m.
Presentation: Begins 6:00 p.m.

For more information and/or to reserve your space, please contact Denise M. Stefano at: dstefano@mercy.edu or (914) 674-7779
The NYSSCPA Westchester Chapter hosts its:

*Annual President’s Dinner/Reception*

honoring the Chapter’s 2013-2014 President, Gina Linss
and
welcoming the Chapter’s incoming 2014-2015 President, William (Bill) Zeboris

**Date:** Wednesday, May 21, 2014

**Location:** Willow Ridge Country Club, 123 North Street, Harrison, NY

**Time:** 6:00 p.m. – 9:00 p.m.
(cocktail reception beginning at 6:00 p.m.)

**Cost:** $65 per person

Contact Denise M. Stefano for more information and/or to register:
dstefano@mercy.edu or (914) 674-7779
PLEASE JOIN THE WESTCHESTER CHAPTER’S YOUNG CPAS AS THEY HOST THEIR:

ANNUAL WINE TASTING NETWORKING EVENT
TO BENEFIT:

BLYTHEDALE CHILDREN’S HOSPITAL

SPEND AN EVENING ENJOYING GOOD WINE AND COMPANY AT THE BEAUTIFUL WILLOW RIDGE COUNTRY CLUB! GUESTS CAN PURCHASE TICKETS TO WIN VARIOUS RAFFLE ITEMS - ALL PROCEEDS TO BENEFIT BLYTHEDALE CHILDREN’S HOSPITAL!

WHEN: MAY 15, 2014 5:30-8:00 PM
WHERE: WILLOW RIDGE COUNTRY CLUB
123 NORTH STREET HARRISON NY 10528
PRICE: $45 MEMBER $50 NONMEMBER IN ADVANCE
$50/$55 AT DOOR

SEND CHECKS PAYABLE TO NYSSCPA WESTCHESTER
ATTN: HEATHER OBODA
CITRIN COOPERMAN & CO, LLP
709 WESTCHESTER AVE, SUITE 200
WHITE PLAINS, NY 10604

RAFFLE DONATIONS NEEDED! PLEASE CONTACT HEATHER OBODA AT: HOBODA@CITRINCOOPERMAN.COM OR (914) 949 - 2990 X 3382
MARCH FOR BABIES!

Please join the Westchester Chapter of the NYSSCPA on April 27th for the March of Dimes March for Babies Walk-a-Thon. Make a generous donation and walk for March for Babies day.

Help support thousands of babies that unfortunately are born prematurely and/or with rare diseases.

If you unable to attend please give your support by donating online at: http://www.marchforbabies.org/team/t2178226

Thank you!

WE NEED VOLUNTEERS!

If you are interested in volunteering to help organize the Westchester Chapter Young CPAs Wine Tasting/Network Event to benefit Blythedale Children’s Hospital

or

if you are interest in the Raffle donations please contact Heather Oboda at: hoboda@citrincooperman.com
NYS SOCIETY OF CPA’S - WESTCHESTER CHAPTER
Announces
THE ANNUAL GOLF OUTING EVENT
TUESDAY, May 13th, 2014
GLEN ARBOR GOLF CLUB
234 Bedford Center Road – Bedford Hills, NY (914) 241-0700

PAYMENT RECEIVED PRIOR TO DECEMBER 31ST, 2013 - $300
PAYMENT RECEIVED PRIOR TO FEBRUARY 15TH, 2014 - $325

SPONSORSHIPS:

<table>
<thead>
<tr>
<th>Sponsorship Description</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Lunch, Golf, Cocktail Hour, Buffet &amp; Dessert*</td>
<td>$350</td>
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<tr>
<td>Lunch, Golf CLINIC, Cocktail Hour, Buffet and Dessert**</td>
<td>$350</td>
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<td>BOTH CLINICS ABOVE AND BELOW ARE LIMITED TO 12</td>
<td></td>
</tr>
<tr>
<td>Morning Group Golf Clinic***</td>
<td>$50</td>
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<tr>
<td>Cocktail Hour, Buffet and Dessert Only</td>
<td>$150</td>
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</tbody>
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* Includes greens fees, forecaddie, cart, and driving range
** The afternoon group clinic will be held from 1-4. It is an intro to all aspects of golf & is a substitution for playing in the event. Minimum of 4.
***The morning group clinic will be held from 10-11. Golfers will receive a full swing video analysis. All levels are welcome.

** ** RESERVE EARLY – THIS EVENT WILL GET CLOSED OUT! ** **

- Line up your foursome with CPAs, clients, bankers, lawyers, etc. If you can’t complete a foursome, we will do it for you.
- The day begins with sign-in/registration at 11:00 am, followed by lunch buffet at 11 am and shotgun start at 12:30 pm. Cocktail “hour” and hors d’oeuvres will begin at approximately 5:30 pm with open bar. Prizes will be awarded during buffet dinner. ALL PRO SHOP CERTIFICATES MUST BE REDEEMED THAT EVENING.
- Our members, attorneys, bankers, and friends have contributed prizes. We thank them for their contributions.
- Clients, spouses and others are welcome to attend!
- Make your reservations early. I look forward to seeing you.
- Rain or Shine! No Refunds

Jeff Schwartz, Chairman

Name (please print) __________________________________________
Office Telephone Number ______________________________________
Firm Name and address ________________________________________
E-mail Address: ______________________________________________

☐ I want to play in a scramble format (OR BELOW) ☐ I want to participate in the AM golf clinic ($50)
☐ I want to play my own ball ☐ I want to ONLY play in the PM golf clinic ($350)
☐ Dinner Only
☐ Please put me in a foursome. My handicap is _____.
☐ I have arranged my foursome (Please list other 3 names) ☐
☐ My check for $ __________ is enclosed.

Send check payable to “NYSSCPA – Westchester Chapter” to:
Stanton and Leone
1025 Westchester Avenue – Suite 301
White Plains, NY 10604
Att’n: Jeffrey A. Schwartz, CPA
Telephone (914) 286-6908
E-Mail: jeff@stantonandleone.com
You're invited to the WCA's Quarterly Networking Reception
hosted by WCA's Young Professionals, OPEN to ALL PROFESSIONALS

Tuesday, May 20th
5:30- 7:30 p.m. @ LIFE...the place to be, Ardsley

Mix, mingle, and rub elbows with top business leaders from around the Westchester County region

Join the WCA for its quarterly networking event where over 150 members of the business community come together for an informal gathering.

WCA Members: $50 ; Future Members: $75

For more information, go to www.westchester.org or call 914-948-6444

CLICK HERE TO REGISTER

To become a sponsor, please contact Tara Lavery, tlavery@westchester.org, 914-948-4144

Event Sponsor:

2014 Partners:
Westchester Chapter of the NYS Society of CPAs
Westchester County Bar Association
The Westchester Women's Bar Association
The Westchester Chapter of the NYSSCPA’s has a number of sponsorship opportunities currently available.

**Golf Outing Committee**

Annual Golf and Networking event

May 14, 2014

$150 to $1,500 plus cost of golf and/or dinner

Please Contact:
Jeff Schwartz
jeff@stantonandleone.com
914-286-6908

**Young CPA’s Committee**

Wine Tasting to Benefit Blythedale’s Children’s Hospital

May 15, 2014

$750 for a table for admissions and logo on flyer

Please Contact:
Heather Oboda
hoboda@citrincooperman.com

**Scholarship Committee**

2014 Scholarships

May 2014

$1,000 Sponsorships Available

Please Contact:
Mark Leeds
mleeds@winprop.com
Denise Stefano
denisestefano@smartpros.com
save the date.

it all starts here.

**NEXT GEN 2014**
The Conference for Young CPAs

(long island)

**Sunday, June 8—Tuesday, June 10, 2014**
Hilton Long Island/Huntington, Huntington, NY
598 Broad Hollow Road
Huntington, NY 11747
Course Code: 25000521

(rochester)

**Sunday, June 15—Tuesday, June 17, 2014**
Radisson Hotel Rochester Riverside
120 East Main Street
Rochester, NY 14604
Course Code: 25000541

(You can pick from either one of these awesome locations.)
Chapter Committees and Major Events Planning 2013-2014
The Westchester Chapter has organized the following committees for the 2013-2014 fiscal year. Active committee service and participation is one of the most important ways you can contribute to the profession. Please take a few minutes to review the committees listed below, and contact the Chair/Co-Chair about becoming a member for any that spark your interest. It is never too late!

We need your support and participation!!!
2014 Calendar

<table>
<thead>
<tr>
<th>Date</th>
<th>Program/Activity/Event</th>
<th>Time</th>
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<tr>
<td>04/27/14</td>
<td>March of Dimes March for Babies Walk-A-Thon</td>
<td>9:00 a.m.</td>
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<tr>
<td>04/29/14</td>
<td>Allied Professionals Networking Breakfast</td>
<td>7:00 a.m. - 9:30 a.m.</td>
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<td>04/30/14</td>
<td>CPA Examination Overview Event</td>
<td>5:30 p.m. - 8:00 p.m.</td>
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<td>05/05/14</td>
<td>Estate and Financial Planning Conference</td>
<td>All Day</td>
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<td>05/13/14</td>
<td>Annual Golf Outing</td>
<td>All Day Event</td>
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<td>05/15/14</td>
<td>Young CPAs Wine Tasting Event</td>
<td>5:30 p.m. - 8:00 p.m.</td>
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<td>05/20/14</td>
<td>WCA’s Quarterly Networking Reception</td>
<td>5:30 p.m. - 7:30 p.m.</td>
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<td>05/21/14</td>
<td>President’s Dinner &amp; Scholarships Presentation</td>
<td>6:00 p.m. - 9:00 p.m.</td>
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<td>06/08/14 - 06/10/14</td>
<td>Young CPAs Conference</td>
<td>All Day Conference</td>
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<td>06/15/14 - 06/17/14</td>
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<td>All Day Conference</td>
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Newsletter Committee

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<tr>
<th>Name</th>
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<tr>
<td>Licia Vizcarra</td>
<td>(914) 997-7724</td>
<td><a href="mailto:Licia.Colamussi@cmcsullocpa.com">Licia.Colamussi@cmcsullocpa.com</a></td>
</tr>
<tr>
<td>Gina Linss</td>
<td>(914) 949-2990</td>
<td><a href="mailto:glinss@citrincooperman.com">glinss@citrincooperman.com</a></td>
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(E-mail submissions to the newsletter committee no later than the 10th day of the month prior to publication.)

For ALL Newsletter Mailing Issues - Use This Form or Call (212)719-8333

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<th>CPA Certificate No. / <em><strong>/</strong></em>/<em><strong>/</strong></em>/<em><strong>/</strong></em>/</th>
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Return this form to: Membership Dept., NYSSCPA, 14 Wall St, 19th Floor, New York, NY 10005

Future Board Meetings 2014

(Board Meetings are generally the 3rd Thursday Morning of the month. Exceptions are noted)

04/17/14 @ 7:30 a.m.

Location: Crowne Plaza, 66 Hale Ave, White Plains, NY

Next Newsletter - May 2014

Happy Spring! Happy Easter!
Mortgage Rate Protection

If mortgage rates drop, you can lower yours at no charge!

If you’ve been waiting to purchase or refinance a home because you thought rates might go even lower, you don’t have to wait any longer! With Mortgage Rate Protection from Citibank, you can apply for a new mortgage today. If our rates go down in the next three years, you can lower your rate at no charge.

Please see important terms & conditions below:

- Competitive mortgage rates today, with protection if our mortgage rates decrease in the future
- Rate protection for 3 years
- Expert advice and help throughout the process

Contact Us

Important Conditions:
- For Citibank First mortgage loan applications made July 23, 2013 through December 31, 2013. Offer not applicable on Home Equity Loans or Lines of Credit.
- Your eligibility in this program will be determined at the time you apply for a first mortgage loan on an existing property with your Mortgage Consultant.
- You must have a Citibank deposit account before closing. Prior to closing, we will verify that you have a Citibank deposit account. This can be an existing account or a new account.
- In addition, we will require you to establish direct debit for mortgage payments from a deposit account.
- Both conforming and jumbo loan amounts are available for this program.
- Program Parameters:
  - The "Rate Protection Conversion Index," which is based on the Citibank per rate, will fall no less than one-quarter of one percentage point (0.25) from the Rate Protection Conversion Index, in effect as of the date the Rate Protection was locked.
  - You must notify Citibank to exercise the Rate Protection Option.
  - Mortgage cannot be underwritten under the Rate or Security Instrument.
  - You must provide or complete any documents the lender requires to affect the new interest rate including, but not limited to a Loan Modification Agreement.

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I help clients grow their businesses. Citibank helps me grow mine.

With Citibusiness® Solutions for Accounting Professionals, you gain greater efficiency for your business and personal finances so that you can focus on helping your clients grow their businesses.

Take advantage of special benefits for Accounting Professionals

For your firm’s finances:
- Citibusiness® Flexible Checking with no monthly maintenance fees
- Preferred rate on Citibusiness® Insured Money Market Account

For your personal finances:
- Citigold, premier personal banking, with waived monthly service fee.

For your clients:
- $100 cash reward after they open a new business checking account.

To enroll, talk to your Citibank Business Specialist.

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