PLEASE JOIN THE WESTCHESTER CHAPTER AT THE:

THE ANNUAL PRESIDENT’S DINNER RECEPTION

Honoring Chapters 2014-2015 President

William Zeboris

And Welcoming in Chapter’s incoming President

Michele Lazzara

SEE ATTACHED FLYER FOR MORE DETAILS!
Dear Westchester Chapter Members,

It is hard to believe that my one year term as President is coming to an end. Our chapter had a great year. None of our successes would have been possible if it were not for my board of directors, our committee chairs and our members. I would to thank all of you for your contributions.

As a chapter we try to find programs for all of our constituents. We present CPE programs to assist our members on the technical side. We have programs tailored for accountants in industry and programs created especially for our Next Gen members. We participate in joint meetings with our peers in the legal and insurance communities and we also interact with Westchester’s two business groups, the Westchester Business Council and the Westchester County Association.

Some of the most rewarding events are when we do something for someone else. At the end of April, the Chapter put together a team to participate in the annual March of Dimes walk. While we had a small team complete the walk, we were still able to raise approximately $1,200 for the March of Dimes. The leaders of this effort and by far the largest fundraisers, was group of graduate students from Mercy College. Thanks to the efforts of Denise Stefano (former president of this chapter and the head of the accounting department at Mercy College) we have seen a tremendous increase in our student membership numbers. This group of bright and energetic students not only raised funds and walked the walked, more importantly they made a difference. If they are representative of the next generation of CPA’s, and I believe they are, then our Society, our Chapter and our profession are in good hands.

Please join us at our annual president’s dinner to be held on May 28th at Willow Ridge Country Club when we recognize some exceptional graduating high school students with a George Mandel Memorial Scholarship and install our new president, Michele Lazzara and her board of directors.

Regards,

Bill

William Zeboris can be reached at: 914-949-2990 x3372 or by email at: wzeboris@citrincooperman.com
THE WESTCHESTER CHAPTER PRESENTS:
THE ANNUAL PRESIDENT’S DINNER
RECEPTION

Honoring Chapters 2014-2015 President
WILLIAM ZEBORIS

And
Welcoming in Chapter’s incoming president
MICHELE LAZZARA

Thursday, May 28, 2015
Willow Ridge Country Club, 123 North Street, Harrison, NY
6:00 p.m. - 9:00 p.m.
Cocktail Reception begins at 6:00 p.m

Cost: $65 per person

For more information and/or to register contact:
Marlena Di Carmine at mdicarmine@citrincooperman.com or 914-949-2990 ext. 3379
Maximizing the Benefits Available from the Social Security System

We welcome our speaker, Bernard Rosen, a public affairs specialist for the Social Security Administration. As such, he is responsible for educating and informing people from Staten Island, Manhattan, the Bronx, and through the lower Hudson Valley about the fundamentals of a program that has played a profound role in the social and economic development of our country. Mr. Rosen started working for SSA as a claims representative in 1974 and then became a field representative in 1980. He was then promoted to his present position as public affairs specialist in 1998. Mr. Rosen earned a BA degree in political science from Lehman College in 1969.

This seminar will educate CPAs on ways to advise their clients on maximizing the benefits available to them from the Social Security system.

Attendees will learn such concepts as “full retirement age”, reduced benefits vs. full benefits, delayed retirement credits and various retirement strategies.

Attendees will be shown the following:

- The new "My Social Security" site: www.socialsecurity.gov/myaccount.
- How monthly benefits differ based on when they elect to begin benefits: http://www.ssa.gov/pubs/10147.html#a0=1.
- The concept of “When is the best age to start your benefits?”: http://www.ssa.gov/retire2/otherthings.htm.
- How to work with the Retirement Estimator, which gives estimates based on one’s actual Social Security earnings record using different scenarios: http://www.ssa.gov/estimator/.
- The frequently asked questions: http://ssa-custhelp.ssa.gov/.
- The Compassionate Allowances program - fast tracking benefits: http://www.ssa.gov/compassionateallowances/.

PLEASE JOIN US IN THE 3RD FLOOR CONFERENCE CENTER OF SKADDER ARPS AT 360 HAMILTON AVENUE IN WHITE PLAINS FROM 7:45 TO 9 AM

Learn and Earn 1 CPE credit. Under the new Accountancy law all CPAs in industry are subject to the CPE regulations. - Course Number 29116506.

Bring a colleague. We provide the coffee and conversation to wake up your brain. We would like to thank our sponsor, Lisa Esteves, Controller, Skadden Arps Slate Meagher & Flom LLP for the use of their conference center.

Contact Michael Herz, michaelbherz@gmail.com or Deborah Rubin, drubin@lepatner.com for further information.
SAVE THE DATE

The YCPA Wine Tasting Event
To Benefit Blythedale Children’s Hospital

When: TBD

Volunteers and donations items needed!

Please contact Heather Oboda at hoboda@citrincooperman.com

More information to follow!

MARK YOUR CALENDARS:

The NYSSCPA Kan Jam Tournament
Wednesday, May 6th, 2015 (6-8p.m.)

Location TBD - Stay Tuned!

DON’T MISS THIS FUN EVENT!
NYS SOCIETY OF CPA’S - WESTCHESTER CHAPTER
Anounces
THE ANNUAL GOLF OUTING EVENT
MONDAY, June 8th, 2015
WILLOW RIDGE COUNTRY CLUB
123 North Street – Harrison, NY (914) 967-6161

PAYMENT RECEIVED PRIOR TO DECEMBER 31ST, 2014 - $300
PAYMENT RECEIVED PRIOR TO FEBRUARY 15TH, 2015 - $325

SPONSORSHIPS:

Lunch, Golf, Cocktail Hour, Buffet & Dessert* $350
Cocktail Hour, Buffet and Dessert Only $150

* Includes greens fees, forecaddie, cart, and driving range

LIMITED GOLD SPONSORSHIP: $1,850 includes
♦ Sign near tee box area that company sponsored the hole
♦ Table at registration desk
♦ Reserved tables at cocktail hour and dinner
♦ Recognition at dinner
♦ Lunch, golf, drinks and dinner for one

Hole Sponsorship - $150

*** 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/brunch at 11:00 am, followed by a 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

Westchester Chapter Golf Outing – June 8th, 2015

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 play my own ball
☐ 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
Attn: Jeffrey A. Schwartz, CPA
Telephone (914) 286-6908
E-Mail: jeff@stantonandleone.com
Chapter Committees and Major Events Planning 2014-2015

The Westchester Chapter has organized the following committees for the 2014 - 2015 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!!!

** ACCOUNTANTS IN INDUSTRY
(formerly CFO Committee) - A forum for NYSSCPA members who are senior financial executives in industry (CFO’s, Controllers, VP’s of Finance), to meet and exchange ideas and knowledge. Monthly informal hour-long breakfast sessions (3rd Wed)
Deborah Rubin, Co-Chair, drubin@lepatner.com
Michael Herz, Co-Chair, (914) 662-2525, michaelbherz@gmail.com

** ACCOUNTING CAREERS - Make presentations to high school and college students; coordinate summer COAP Program; Administer Chapter's high school scholarship program.
Denise Stefano, Chair (914) 674-7779, dstefano@mercy.edu

** ACCOUNTING & AUDITING PRINCIPLES
- Primary focus is to discuss current accounting and auditing topics, conduct future CPA seminars and involvement in community and profession-related activities.
Denise Stefano, Co-Chair (914) 674-7779, dstefano@mercy.edu
Gina Goodenow, Co-Chair (914) 997-4486 ggoodenow@marchofdimes.com

** ESTATE AND FINANCIAL PLANNING -
One of the chapter’s most active committees.
Annual conference, quarterly presentations and monthly breakfast discussion groups.
Robert L. Ecker, Co-Chair (914) 273-0777, RLE@Ecker-Law.com
Howard Klein, Co-Chair (914) 949-2990, HKlein@citrincooperman.com

** GOLF OUTING - Help organize the annual outing. Major networking opportunity!
Jeffrey A. Schwartz, Chair, (914) 286-6908, jeff@stantonandleone.com

** GOVERNMENT RELATIONS - Coordinate activities with the State Society and legislators. To enhance government relations within our local region.
Barbara Bel, Chair, (914) 341-7062 bbel@odmd.com

** LOCAL PRACTITIONERS -
To coordinate monthly programs.
Stephen E. Franciosa, Co-Chair, sfranciosa@cpa.com
Catherine Censullo, Co-Chair, Catherine.Censullo@emcensullocpa.com

** PROFESSIONAL & COMMUNITY OUTREACH - Join a group of Business professionals. Coordinate events during the year to promote professional and community relations.
Howard Klein, Co-Chair (914) 949-2990, HKlein@citrincooperman.com
Mark G. Leeds, Co-Chair (914) 468-7313, mleeds@winprop.com

** ANNUAL RECRUITMENT EVENT -
Coordinate annual event with local colleges, students and business people.
Michele Lazzara, Co-Chair (914) 909-3421, mlazzara@markspaneth.com
Heather Oboda, Co-Chair (914) 949-2990 x 3382 hoboda@citrincooperman.com
Denise Stefano, Co-Chair (914) 674-7779, dstefano@mercy.edu

** SPONSORSHIPS - Coordinate with institutions who might sponsor Chapter events.
Mark G. Leeds, Co-Chair (914) 468-7313, mleeds@winprop.com
Gina Linss, Co-Chair, (914) 949-2990, glinss@citrincooperman.com

** TAX - Coordinates 2 all-day tax conferences in the October/November and December months: the first on Small Business Taxes and the second on Individual Taxes. Committee also hosts monthly breakfast routable discussion/meetings.
Doug Ruttenberg, Chair, druttenberg@odpkf.com

** YOUNG CPAs - Coordinate different events and outings during the year for Young CPAs.
Matthew Katz, Co-Chair (914) 949-2990, mkatz@citrincooperman.com
Edward Wells, Co-Chair: EWells@pscpafirm.com
# 2015 Calendar

<table>
<thead>
<tr>
<th>Date</th>
<th>Program/Activity/Event</th>
<th>Time</th>
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<tbody>
<tr>
<td>05/04/15</td>
<td>Estate Planning Conference</td>
<td>All Day</td>
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<tr>
<td>05/06/15</td>
<td>NYSSCPA Kan Jam Tournament</td>
<td>TBD</td>
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<td>05/14/15</td>
<td>YCPA Wine Tasting Event</td>
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<tr>
<td>05/20/15</td>
<td>Accountants In Industry CPE Session</td>
<td>7:45 a.m. - 9:00 a.m.</td>
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<td>05/28/15</td>
<td>President’s Dinner Reception</td>
<td>6:00 p.m. - 9:00 p.m.</td>
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<tr>
<td>06/08/15</td>
<td>Golf Outing Event</td>
<td>All Day</td>
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<tr>
<th>Newsletter Committee</th>
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<tr>
<td>Licia Vizcarra</td>
<td>(914) 997-7724</td>
<td><a href="mailto:Licia.Vizcarra@cmcensulllocpa.com">Licia.Vizcarra@cmcensulllocpa.com</a></td>
</tr>
<tr>
<td>William Zeboris</td>
<td>(914) 949-2990</td>
<td><a href="mailto:wzeboris@citrincooperman.com">wzeboris@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.)*

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

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Return this form to: Membership Dept., NYSSCPA, 14 Wall St, 19th Floor, New York, NY 10005

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**FUTURE BOARD MEETINGS 2015**

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

05/28/15 @ 4:00 p.m. (Prior to President’s Dinner Reception)

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

**NEXT NEWSLETTER - JUNE 2015**

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**HAPPY MOTHER’S DAY!**

**HAPPY MEMORIAL DAY!**

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- Expert advice and help throughout the process

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1. Your eligibility in the program will be determined at the time you apply for a first mortgage loan on a specific property with your Mortgage Consultant.
2. 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.
3. In addition, we will require you to establish direct debit for mortgage payments from a deposit account.
   Both conforming and jumbo loan amounts are allowed for this program.
   Program Parameters:
   1) The "Rate Protection Conversion Index," which is based on the Citibank per rate, must fall more than one quarter of one percentage point (0.25%) from the Rate Protection Conversion Index in effect as of the date the Note rate is locked.
   2) You must notify Citibank at least 30 days prior to the Rate Protection Option.
   3) Mortgage cannot be refinanced under the Rate or the Security Instrument.
   4) You must provide or complete any documents to the Rate Holder required to effect the new interest rate, including, but not limited to a Loan Modification Agreement.
   Terms and conditions of accounts, programs, products and services are subject to change.

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2 Offer applies to accounting professionals and CPA’s, who are owners or employees of an accounting firm that is a customer in the CitiBusiness Solutions for Accounting Professionals Program.

3 Qualifying behaviors required. See a Business Specialist for details.

Please speak with a Citibank Business Specialist for full details on the CitiBusiness Solutions for Accounting Professionals Program. Offer subject to change or termination at any time without notice, and cannot be combined. The terms, conditions and fees for accounts, products, programs and services are subject to change. All accounts and services are subject to approval.

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