SPRING IS HERE!

LOTS OF EXCITING EVENTS COMING UP:

April 29th
WOMEN’S LEADER PANEL DISCUSSION/SYMPOSIUM on Page 3

May 6th
CPA EXAMINATION OVERVIEW on Page 4

SEE ATTACHED FLYERS FOR MORE DETAILS!
From Chapter President Michele Lazzara…

Dear Westchester Chapter Members,

I wanted to inform you about a very important Chapter event we have planned for this month, and hope to have your participation.

On Friday, April 29th, during an early morning session, the New York State Society of CPAs (NYSSCPA) Westchester Chapter will be hosting an Executive Business and Accounting Leader Panel Discussion/Symposium: “Navigating the Path to a Successful Accounting and Business Career – An Executive Women’s View.” The event will be held at the Mercy College Dobbs Ferry campus located at 555 Broadway, Dobbs Ferry, NY, in the College’s Main Hall Building, Lecture Hall room, and we would like to extend an invitation to all of you and your student organization/teams. The event is being offered “free of charge” in connection with the Chapter’s public advocacy initiatives, and will commence at 7:30 a.m. with registration, breakfast, and pre-event networking. The event is scheduled to conclude at 10:15 a.m.

The panel discussion will feature some highly impressive senior executive women leaders from Fortune 100 companies, top accounting firms/organizations, and a major NYS not-for-profit organization, who will be discussing a host of topics related to women’s progression in the accounting and business profession, and imparting advice for career growth, transition, and success, within various employment settings. The panelists will include:

Donna Angiulo, VP of Finance and CFO, IBM Commerce  
Barbara Bel, Partner, PKF O’Connor Davies, LLP  
Andrea Forster, Corporate Controller, Mastercard (also former PepsiCo. Bottling Group Controller, and former PepsiCo. executive)  
Mary Grande, Partner Financial Services, KPMG  
Alisa Kesten, Executive Director, Volunteer New York! (background includes former Hillary Clinton campaign leader)  
Gail Kinsella, Past President (statewide) NYSSCPA, and Member Women’s Initiatives Executive Committee for the AICPA  
Allison Tucciarone, Senior Managing Director, PwC

The panel will be hosted by moderator, Edie Magnus, the Executive Director of Media and Innovation at Mercy College and also a former NBC and CBS news correspondent/anchor.

Please note that even though the panel discussion will target career growth and success matters from a women’s perspective, the event will be beneficial to any attendee – male or female – as it will include terrific networking opportunities both before the event (during breakfast) and afterward as time permits. I would, therefore, encourage, you, your staff, and anyone else you feel might be interested and/or benefit from this event, to attend.

An RSVP is necessary as this event is being mass promoted throughout Westchester County and surrounding locales, and we are expecting a large turnout. To RSVP or if you have any further questions about the event, please contact Denise Stefano at: dstefano@mercy.edu.

I hope to see you, your staff, and colleagues at the event!

Regards,  
Michele

Michele Lazzara can be reached at: 914-909-3421 or by email at: mlazzara@markspaneth.com
The Westchester Chapter of the New York State Society of CPAs (NYSSCPA) in partnership with Mercy College, hosts:

A Panel Discussion/Symposium

“Navigating the Path to a Successful Accounting and Business Career”

(An Executive Women’s View)

The NYSSCPA Westchester Chapter and Mercy College welcome you to a breakfast and panel discussion/symposium featuring talented executive-level female CPAs and business professionals from a variety of professional settings. Topics discussed will include:

- the progress of women in the accounting and business profession
- business and practice development advice for career success
- successful integration of personal and professional lives

AND MUCH MORE!

This program is being offered at NO COST
(in connection with the NYSSCPA’s public advocacy initiatives)
All are welcome!

Limited Seating Available • RSVP Required • RSVP at: dhaddad@mercy.edu

Agenda:

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>7:30AM</td>
<td>Registration, breakfast, and Pre-event Networking</td>
</tr>
<tr>
<td>8:20AM</td>
<td>Welcome Remarks by NYSSCPA &amp; Mercy College</td>
</tr>
<tr>
<td>8:25AM</td>
<td>Introduction of Panelists</td>
</tr>
<tr>
<td>8:30AM</td>
<td>Panel Discussion/Symposium</td>
</tr>
<tr>
<td>10:15AM</td>
<td>Closing Remarks</td>
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</tbody>
</table>

With Panel Moderator: Edie Magnus, Mercy College Executive Director of Media and Innovation
(Former NBC and CBS News Correspondent, Anchor)

Date, Location, and Time:

Mercy College – Main Hall Lecture Hall
555 Broadway
Dobbs Ferry, New York 10522
Friday, April 29th 7:30AM-10:15AM

Featured Panelists

Donna Angiulo
VP of Finance & CFO
IBM Commerce

Barbara Bel
Partner
PKF O’Connor Davies, LLP

Andrea Forster
Corporate Controller
MasterCard

Mary Grande
Partner, Financial Services
KPMG

Alisa Kesten
Executive Director
Volunteer New York!

Gail Kinsella
Women’s Initiatives Executive Committee
AICPA
Past President (Statewide)
NYSSCPA

Allison Tucciarone
Senior Managing Director
PwC
The NYSSCPA Westchester Chapter and Becker Professional Education Present:

“Everything You Need to Know About the New 2017 CPA Examination”

The CPA Examination is facing some significant changes, so don’t miss this important seminar to learn more and “get in the know”!

Program highlights to include:

- An overview of the CPA Examination’s Structural changes
- New question formats (including Document Review Simulations) and content
- Test-taking strategies, new question demonstrations, and so much more!

This seminar is being provided “free of charge” so reserve your space now as seating is limited!

Morning refreshments will be served!

Date: Friday, May 6, 2016
Location: Mercy College, 555 Broadway, Dobbs Ferry, NY (Victory Hall Trading Floor Facility, Room 100)
Time: 8:00 a.m. – 10:30 a.m.

(Registration and refreshments to be served starting at 8:00 a.m.; presentation to commence at 8:30 a.m.)

For more information and/or to reserve your space, please contact: Denise M. Stefano at dstefano@mercy.edu or (914) 674-7779
JOIN US AT THE
ACCOUNTANTS IN INDUSTRY COMMITTEE
WEDNESDAY APRIL 20, 2016

Protecting Assets from the Cost of Long-Term Care
and Utilizing Medicaid Homecare as the First Option

We welcome our speaker, Attorney Anthony Enea, Managing Partner of the firm Enea, Scanlan & Sirignano, LLP.

Celebrate the end of tax season by adding a couple of arrows to your quiver. Join us in an informative presentation on Long-Term Care and Medcaid homecare as options for an aging population.

Topics include:

1. Asset Protection Planning - Powers of Attorney
   Revocable Trusts
   Irrevocable/Medicaid Trusts
   Protecting the homestead
   For Medicaid
   Estate recovery/probate assets only
   Protecting the estate from a Medicaid claim

2. Medicaid Homecare - Eligibility criteria
   Income
   Resources
   Spousal refusal
   Transfer assets
   Application process
   Documents needed
   Completing the application
   Where to file
   Pooled income only trusts
   Medicaid Managed Long Term Care/home care services
   Maximizing home care hours

PLEASE JOIN US IN THE 3RD FLOOR CONFERENCE CENTER OF SKADDEN 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 29115606.

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 ACCOUNTANTS IN INDUSTRY PRESENTS:

LATEST DEVELOPMENTS IN THE DEBT COLLECTION PROCESS

When: Wednesday, May 18th

Where: Skadden Arps Slate Meagher & Flom LLP
        360 Hamilton Ave 3rd FL, White Plains, NY

Time: 7:45 a.m. 9:00 a.m. (1 CPE)

Speaker: Attorney Jocelyn Nager
The NYSSCPA Westchester Chapter hosts its:

*Annual President’s Dinner/Reception*

Honoring the Chapter’s 2015-2016 President,

**Michele Lazzara**

and

Welcoming the Chapter’s incoming 2016-2017 President,

**Catherine M. Censullo**

**Date:** Thursday, May 26th, 2016  
**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 Maria Hongach for more information and/or to register at 914-909-3454 or MHongach@markspaneth.com
Dear Fellow Members and Friends of the Westchester County Bar Association, the Financial Planning Association of the Greater Hudson Valley and the Westchester Chapter of the New York State Society of CPAs:

We invite you, your spouse or significant other, and your friends to join us for a spectacular networking and educational event on a topic that is near and dear to us all: Helping Your Clients and Loved Ones Deal with Alzheimer’s Disease.

We have a special evening planned at the Doral Arrowwood in Rye Brook on June 9th, 2016 that you won’t want to miss!

Our networking session begins the evening from 5:30 pm to 6:45 pm where you will be able to mix and mingle with your colleagues and friends, make new connections, establish new resources, and develop new opportunities to forge alliances that will benefit both your current and future prospects and clients as well as your family and loved ones. Get your fill of food and drink as you bond with other attendees and prepare for the evening’s program.

Then it will be time to gather your popcorn and beverages, and settle into the theater to hear from pioneer Peter J. Strauss of Drinker Briddle as he sets the stage and holds a pointed discussion on the topic in preparation for your viewing of the Glen Campbell Story in the documentary film “I’ll Be Me.” Click here if you wish to see his bio.

Learn more about the eldercare issues dealing with Alzheimer’s disease and other cognitive illnesses that touch us all. Find out about the ethical issues that need to be addressed. Gain a better understanding of the fiduciary responsibility and legal capacity issues surrounding this area. Better aid and assist your clients, prospects and loved ones as they face these issues with their own family members.

See how Glen Campbell and his family deal with this issue on a very personal level and hear from other professionals and celebrities who have had to face and deal with these issues first hand. Gain a perspective that will help you better assist your clients and loved ones when they are faced with similar challenging situations.

SEATING IS LIMITED! PLEASE REGISTER BY: Wednesday, June 1st, 2016

TO REGISTER:
Contact your Association Person below.
Registration fee for members and non-members is $75.00.
You will be provided registration confirmation required to attend the event.
All food and non-alcoholic beverages included in the price. One glass of wine or beer included in the price.
Cash bar available for additional alcoholic beverages.

FPA Greater Hudson Valley
Marcia Kaplan, CFP®
marcia.s.kaplan@ampf.com
914-269-0700 x11
3 CFP CE Credits - Program ID 224884
To Register Online please click here

NYSSCPA
Amy Amodeo
rio@ecker-law.com
914-273-0777 (fax 914-273-1787)
3 CPE Credits - Course Code 29112701
To Register Online please click here

Westchester County Bar Association
Luis Rivera, Esq.
cle@wcbany.org
914-761-3707 x20
Certificates for 3 CLE credits will be provided to Attorney attendees

Date: Thursday, June 9th, 2016
Time: 5:45 p.m. to 9:30 p.m.
Location: Doral Arrowood, 975 Anderson Hill Rd, Rye Brook, NY

For directions to the Doral Arrowwood please click here.
NYS SOCIETY OF CPA’S - WESTCHESTER CHAPTER
Announces
THE ANNUAL GOLF OUTING EVENT
MONDAY, June 13th, 2016
WILLOW RIDGE COUNTRY CLUB
123 North Street – Harrison, NY (914) 967-6161

PAYMENT RECEIVED PRIOR TO DECEMBER 31ST, 2015 - $300
PAYMENT RECEIVED PRIOR TO FEBRUARY 15TH, 2016 - $325

SPONSORSHIPS:

<table>
<thead>
<tr>
<th>Lunch, Golf, Cocktail Hour, Buffet &amp; Dessert*</th>
<th>$350</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cocktail Hour, Buffet and Dessert Only</td>
<td>$150</td>
</tr>
</tbody>
</table>

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
- Brunch, golf, drinks and dinner for one

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

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.
- 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 13th, 2016

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
Att’n: Jeffrey A. Schwartz, CPA
Telephone (914) 286-6908
E-Mail: jeff@stantonandleone.com
Chapter Committees and Major Events Planning 2015-2016

The Westchester Chapter has organized the following committees for the 2015-2016 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

** 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 bbet@odmd.com

** LOCAL PRACTITIONERS - To coordinate monthly programs.
Stephen E. Franciosa, Co-Chair, sfranciosa@cpa.com
Catherine Censullo, Co-Chair, Catherine.Censullo@cmccensullocpa.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.
Richard Terrano, Co-Chair, (212) 330-6085, rterran@markspaneth.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
### 2016 Calendar

<table>
<thead>
<tr>
<th>Date</th>
<th>Program/Activity/Event</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/20/2016</td>
<td>Protecting Assets from LTC - Accountants in Industry CPE</td>
<td>7:45 a.m. - 9:15 a.m.</td>
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<tr>
<td>04/29/2016</td>
<td>Women’s Leader Panel Discussion/Symposium</td>
<td>7:30 a.m. - 10:15 a.m.</td>
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<tr>
<td>05/06/2016</td>
<td>CPA Examination Overview</td>
<td>8:00 a.m. - 10:30 a.m.</td>
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<tr>
<td>05/18/2016</td>
<td>Latest Developments in Debt Collection - Accountants in Industry CPE</td>
<td>7:45 a.m. - 9:15 a.m.</td>
</tr>
<tr>
<td>05/26/2016</td>
<td>President’s Dinner</td>
<td>6:00 p.m. - 9:00 p.m.</td>
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<tr>
<td>06/09/2016</td>
<td>Allied Professionals Networking Night at the Movies</td>
<td>5:30 p.m. - 9:30 p.m.</td>
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<tr>
<td>06/13/2016</td>
<td>Annual Golf Outing</td>
<td>All Day Event</td>
</tr>
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**For ALL Newsletter Mailing Issues - Use This Form or Call (212)719-8333**

- **CPA Certificate No.** /___/___/___/___/___/___/
- **Name:** (Last, First, Middle Initial)
- **Firm Name**
- **Firm Address**
- **City, State, Zip**
- **Business Phone** ( )
- **CPA Certificate No.** /___/___/___/___/___/___/
- **Name:** (Last, First, Middle Initial)
- **Firm Name**
- **Firm Address**
- **City, State, Zip**
- **Business Phone** ( )

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

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**FUTURE BOARD MEETINGS 2016**

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

- **04/21/2016 @City Limits Diner**

**NEXT NEWSLETTER - MAY 2016**

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**HAPPY TAX DEADLINE!**
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 registered July 23, 2015 through December 31, 2015, Citibank does not apply to any Home Equity Loans or Lines of Credit.

1. Your eligibility in the program will be determined at the time you apply for a first mortgage loan on a specific property with a 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:

- The "Rate Protection Conversion Index," which is based on the Citibank prime rate, must fall more than one quarter of one percentage point (0.25%) from the Rate Protection Conversion Index as of the date the Note rate was locked.

- You cannot opt-out of the Rate Protection Options.

- Mortgage cannot be defeased under the Note or the Security Instrument.

- You must provide or complete any documents to the Note 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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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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1 A business checking account is required to receive the preferred rate on CitiBusiness Insured Money Market Account. The entire balance in your CitiBusiness Insured Money Market Account earns the same interest rate, which is determined by the total balance in your account. You earn the preferred rate only if your total balance is less than $50,000.00. Speak to your Business Specialist for full details.
2 Offer applies to accounting professionals and CPAs who are owners or employees of an accounting firm that is a customer of 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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