TAX HOTLINE ANNOUNCEMENT:

The Westchester Chapter in cooperation with The Journal News will host its annual tax hotline on Saturday, March 3rd, 2018 from 9 a.m. to 12 p.m. at The Journal News offices at: 1133 Westchester Ave, White Plains.

We are looking for volunteers to answer phone in and web chat questions. This is a wonderful way to provide community service and to get publicity for our profession. We need your assistance in helping our county residents with any tax questions they may have. This year it is particularly important due to the recent tax law changes.

If you are interested in participating, please contact Robert Winton by email at rwinton@citrincooperman.com or by phone at 914-949-2990 ext. 3326. Make sure that you include your name, address and telephone number.

We will contact you with more details. We will also let you know what materials to bring that past volunteers found helpful to refer to when answering questions.

THANK YOU!

The Westchester Chapter appreciates your help.
We welcome our speakers, Andrew Roth and William Miller, both with Danziger and Markhoff LLP. Please join us in an interactive and informative discussion on understanding the basics of designing retirement plans for your clients. This session will cover:

- Types of qualified retirement plans
- Contribution Limits:
  - What is the maximum amount that can be contributed on the owner’s behalf?
- Limiting staff costs:
  - Coordinating 401(k) plans and profit-sharing plans as a strategy to reduce staff costs.
- Pros and cons of Roth 401(k)s
- Cash Balance Plans
  - State-of-the-art defined benefit plans which will enable owners to substantially increase their contributions. Ideal for multiple owner and multiple employee situations.
- Other defined benefit plans
  - Prior service design
  - Accumulation design
- Split plan design
- Questions / review

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 29112806.

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.
NYS SOCIETY OF CPA’S - WESTCHESTER CHAPTER
Proudly Announces
THE ANNUAL GOLF & NETWORKING EVENT
MONDAY, August 13th, 2018
WYKAGYL COUNTRY CLUB
1195 North Avenue – New Rochelle, NY (914) 636-8700

PAYMENT RECEIVED PRIOR TO DECEMBER 31ST, 2017 - $350

Next Gen members (and their guests under 40 years of age) - $200, but limited to three foursomes

OPTIONS TO ATTEND:

Lunch, Golf, Cocktail Hour, Buffet & Dessert* $375
Cocktail Hour, Buffet and Dessert Only $150

SPONSORSHIPS:

LIMITED GOLD SPONSORSHIP: $1,900 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

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

*** 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 registration/driving range/putting green/BBQ lunch at 11:00 am, followed by a shotgun start at 12:30 pm. There will also be on-course refreshments. Cocktail “hour” and hors d’oeuvres will begin at approximately 5:30 pm with open bar. Prizes will be awarded during buffet dinner and thought the pro shop closes around 7:00 pm, any certificates can be redeemed after the event.
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

Westchester Chapter Golf Outing – August 13th, 2018

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 (only form of payment) for $ __________ is enclosed.

Send check payable to “NYSSCPA – Westchester Chapter” to:
Emmerman, Boyle & Associates, LLC
1025 Westchester Avenue – Suite 301
White Plains, NY 10604
Att’n: Jeffrey A. Schwartz, CPA
Telephone (914) 286-6908
E-Mail: jschwartz@eba.nyc
Need help with a tax issue?
Have a tax issue you’d like to share with your colleagues?
Then,

JOIN US AT THE
TAX COMMITTEE
MONTHLY MEETING!

**When:** 1st Wednesday of each month

**Where:** D’Arcangelo and Company, LLP
800 Westchester Ave, Room N-400
Rye Brook, NY 10573

**Time:** 8 a.m. - 9:00 a.m.

If you cannot make it in-person, you could also conference in by phone!

**Call in #:** 800-501-8979
**Access Code:** 2589247

For more information please contact Doug Ruttenberg at druttenberg@pkfod.com or call 914-341-7064
Chapter Committees and Major Events Planning 2017-2018

The Westchester Chapter has organized the following committees for the 2017-2018 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 - 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, (212) 935-4400, 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, Chair, (914) 674-7779, dstefano@mercy.edu

** COAP COMMITTEE - Coordinate the COAP (Career Opportunities in the Accounting Profession) Program, a week long training program that takes place during the summer targeted to minority students interested in the Accounting profession.
Frank Pellegrino, Co-Chair, (914) 345-5888, FPellegrino@pscpafirm.com
Carolyn Christesen, Co-Chair, (914) 606-6876, Carolyn.Christesen@sunywcc.edu

** ESTATE AND FINANCIAL PLANNING - One of the chapter’s most active committees. Annual conference, quarterly presentations and monthly breakfast discussion groups.
Robert 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, jschwartz@eba.nyc

** GOVERNMENT RELATIONS - Coordinate activities with the State Society and legislators as well as the IRS. To enhance government relations within our local region.
Bernadette Schopfer, Chair, (914) 644-9247, bhs@mgroupeusa.com

** LOCAL PRACTITIONERS - Coordinate monthly programs.
Stephen Franciosa, Co-Chair, (718) 885-9191, sf Franciosa@iona.edu
Catherine Censullo, Co-Chair, (914) 997-7724, 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

** 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 x3382, hoboda@citrincooperman.com
Denise Stefano, Co-Chair, (914) 674-7779, dstefano@mercy.edu

** SPONSORSHIPS - Coordinate with institutions who might sponsor Chapter events.
Richard Terrano, Chair, (212) 330-6085, rt errano@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 roundtable discussion/meetings.
Doug Ruttenberg, Chair, (914) 381-8900, druttenberg@pkfod.com

** YOUNG CPAs NextGen - Coordinate different events and outings during the year for Young CPAs.
Matt Katz, Co-Chair, (914) 949-2990, mkatz@citrincooperman.com
Greg Re, Co-Chair, (203) 327-7151, Gre@mdcocpa.com
## 2018 Calendar

<table>
<thead>
<tr>
<th>Date</th>
<th>Program/Activity/Event</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/03/2018</td>
<td>Tax Hotline</td>
<td>9:00 a.m. - 12:00 p.m.</td>
</tr>
<tr>
<td>03/21/2018</td>
<td>Accountants In Industry CPE - Retirement Plan Design</td>
<td>7:45 a.m. - 9:00 a.m.</td>
</tr>
<tr>
<td>08/13/2018</td>
<td>Annual Golf Outing</td>
<td>All Day Event</td>
</tr>
</tbody>
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### Newsletter Committee

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone</th>
<th>E-Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Licia Vizcarra</td>
<td>(914) 997-7724</td>
<td><a href="mailto:Licia.Vizcarra@cmcensulloclcpa.com">Licia.Vizcarra@cmcensulloclcpa.com</a></td>
</tr>
<tr>
<td>Gina Goodenow</td>
<td>(212) 251-4042</td>
<td><a href="mailto:GinaGoodenow@gmail.com">GinaGoodenow@gmail.com</a></td>
</tr>
</tbody>
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*(E-mail submissions to the newsletter committee no later than the 10th day of the month prior to publication.)*

### FUTURE BOARD MEETINGS 2018

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

- **2/16/18 @ 8:30 a.m. - Conference Call**

**NEXT NEWSLETTER - APRIL 2018**

### HAPPY TAX SEASON TO ALL!

### HAPPY VALENTINE’S DAY!