JOIN US AT THE:

ACCOUNTANTS IN INDUSTRY COMMITTEE
OF THE NYSSCPA WESTCHESTER CHAPTER
WEDNESDAY, MARCH 20, 2019

Our speaker Joseph Moschitto of JDM Benefits will be discussing the changes that have been made to the Affordable Care Act (Obama Care) in the past year and how they may impact your clients and organization.

He will also update us on today's PEO (Professional Employer Organization), and discuss the benefits and drawbacks of using a third party for all your Human Resources tasks!

PLEASE JOIN US IN THE 3rd FLOOR CONFERENCE CENTER OF SKADDEN ARPS
AT 360 HAMILTON AVENUE IN WHITE PLAINS FROM 7:45 AM TO 9:00 AM

Learn and Earn 1 CPE credit (pending approval)
Under the new Accountancy law all CPAs in industry are subject to the CPE regulations. – Course Number TBD

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
From Chapter President Michael Herz...

Tax Season is now upon us and we will soon be scrambling and struggling to explain the new tax laws and the ramification to our respective clients. Fortunately, many of our tax programs now come equipped with a sub-program which calculates the overall effect of the Tax Cuts and Jobs Act versus the prior tax law on a client by client basis.

As we make our way through this busy season in which many of us work 7 days a week, we should still try to take care of ourselves, so we don’t become too run down and susceptible to colds, etc. So, trying to get at least 6 hours of sleep per night and eating healthy would certainly be a good start, especially if we already curtailed the exercise program we started on January 2nd.

The Westchester Chapter has accomplished well over half its programming for the year and the months of February and March tend to be a bit quiet. We recently had a very successful Managing Partners breakfast at which approx. 75% of the Board, along with 10 of the County’s most prestigious CPA firms shared ideas, viewpoints and suggestions with our two very distinguished guests from downtown, current Statewide President Jan Herringer and Statewide President-Elect Ita Rahilly. It concluded with a terrific suggestion that each firm designates an individual to be the liaison to the Board for event participation, etc. We are currently following up on that suggestion.

Upcoming programming of the Chapter will include Allied Professional Committee morning session on Trusts on February 15th at Doral Arrowwood and the Accountants in Industry Committee with their morning session on PEO’s and an ACA update on March 20th. The Chapter is once again providing its Tax Hotline on Saturday, March 2nd at the Journal News with Robert Winton and various volunteers (if interested, we are a bit short on volunteers).

I wish everyone a healthy and prosperous busy season.

Best Regards,

Michael Herz

Michael Herz can be reached by phone at (203) 731-1577 or by e-mail at michaelbherz@gmail.com
JOIN THE ALLIED PROFESSIONAL GROUP OF WESTCHESTER
AT THEIR NEXT BREAKFAST CPE EVENT:
“EVERYTHING YOU EVER WANTED TO KNOW ABOUT TRUSTS BUT WERE AFRAID TO ASK”
YOU WON’T WANT TO MISS THIS GREAT EVENT!!!
Friday, February 15, 2019
From 7:30 a.m. to 11:00 a.m.
DORAL ARROWWOOD, RYE BROOK, NY

We will have a panel of speakers to discuss the legal, financial, and tax aspects of all types of Trusts and the impact on your clients and their family members. The panelists will be:

• Robert L. Ecker, Esq., CPA, LLM (Ecker, Ecker & Associates, LLP)
• Lisa Rispoli, CPA, AEP, Partner (Grassi & Co.)
• Maryann Schugmann, CPA, Partner (Grassi & Co.)

While you take advantage of this opportunity to network with your fellow CPAs, attorneys, and financial planning colleagues, you can also learn more about how to better assist your clients by utilizing and working with Trusts.

The panel will review and help you read and understand the significant provisions of various types of Trusts, revocable and irrevocable, lifetime and testamentary, including a SLAT, GRAT, Insurance Trust, GST Trust, Grantor Trust, QTIP Trust, and Special Needs Trust. The panel will also address fiduciary income tax and gift tax return issues relating to these various Trusts, as well as key generation-skipping transfer (GST) tax issues and planning opportunities after the 2017 Tax Act.

Save the date and register for this most informative program. Seating is limited, so don’t wait to register for this great event. Information on continuing education credits available will be provided shortly.

Friday, February 15, 2019
7:30 a.m. - 11:00 a.m.
Doral Arrowwood
975 Anderson Hill Rd, Rye Brook, NY 10573

TO REGISTER:
Contact your Association Person below.
Registration fee $45.00. You will be provided a registration confirmation required to attend the event. Breakfast is included in the price.

FPA Greater Hudson Valley
Marcia Kaplan, CFP
marcia.s.kaplan@ampf.com
914-289-0700x11
3 CFP CE Credit

NYSSCPA
Debb Mastromatteo
dle@ecker-law.com
914-273-0777
3 CPA CPE Credit - Course Code: 29116907
TO REGISTER ONLINE CLICK HERE

Westchester County Bar Association
Fern Richter
Fern@wcbany.org
914-761-3707x20
3 CLE Certificate

We look forward to seeing you.
TAX HOTLINE ANNOUNCEMENT:

The Westchester Chapter in cooperation with The Journal News will host its annual tax hotline on Saturday, March 2nd, 2019 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 by answering tax questions, please contact Robert Winton by e-mail 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.
NYS SOCIETY OF CPA’S - WESTCHESTER CHAPTER
Proudly Announces
THE ANNUAL GOLF & NETWORKING EVENT
TUESDAY, July 23rd, 2019

WYKAGYL COUNTRY CLUB
1195 North Avenue – New Rochelle, NY (914) 636-8700

PAYMENT RECEIVED PRIOR TO DECEMBER 31ST, 2018 - $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 through 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

Jeff Schwartz, Chairman

Westchester Chapter Golf Outing – TUES, July 23rd, 2019

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:
Greg Re - gre@mdcocpa.com or 203-327-7151,
or John Brant - jbrant@pkfod.com or 914-341-7626
Chapter Committees and Major Events Planning 2018-2019

The Westchester Chapter has organized the following committees for the 2018-2019 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, (203) 731-1577, 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.
Tameka Walters, Co-Chair, (914) 949-2990 x3351, twalters@citrincooperman.com
Carolyn Christesen, Co-Chair, (914) 606-6876, Carolyn.Christesen@sunywcc.edu

** DIVERSITY & INCLUSION COMMITTEE -**
Create chapter programming to ensure that the profession is positioned to attract aspiring professionals of all types, regardless of race, gender, sexual orientation, religion, disability status or any other aspect of diversity.
Tameka Walters, Co-Chair, (914) 949-2990 x3351, twalters@citrincooperman.com
Gwendolyn Horn, Co-Chair, (914) 341-7092, ghorn@pkfod.com

** 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@mgroupusa.com

** LOCAL PRACTITIONERS -**
Coordinate monthly programs.
Stephen Franciosa, Co-Chair, (718) 885-9191, sfranciosa@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.
Ed Wells, Co-Chair, (914) 345-5888 x110, ewells@pscpafirm.com
Tameka Walters, Co-Chair, (914) 949-2990 x3351, twalters@citrincooperman.com

** SPONSORSHIPS -**
Coordinate with institutions who might sponsor Chapter events.
Richard Terrano, Co-Chair, (212) 330-6085, rterrano@markspaneth.com
Robert Winton, Co-Chair, (914) 949-2990 x3326, rwinton@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 roundtable discussion/meetings.
Greg Re, Co-Chair, (203) 327-7151, greg@mdcoepa.com
John Brant, Co-Chair, (914) 341-7626, jbrant@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, Greg@mdcoepa.com
**2018-2019 CALENDAR**

<table>
<thead>
<tr>
<th>Date</th>
<th>Program/Activity/Event</th>
<th>Time</th>
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<tbody>
<tr>
<td>02/15/2019</td>
<td>Allied Professionals CPE Breakfast Event</td>
<td>8:00 a.m. - 9:30 a.m.</td>
</tr>
<tr>
<td>03/02/2019</td>
<td>Tax Hotline Event</td>
<td>9:00 a.m. - 12:00 p.m.</td>
</tr>
<tr>
<td>03/20/2019</td>
<td>Accountants in Industry CPE</td>
<td>7:45 a.m. - 9:00 a.m.</td>
</tr>
<tr>
<td>07/23/2019</td>
<td>Annual Golf Outing Event</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) 294-2500</td>
<td><a href="mailto:lvizcarra@cgallp.com">lvizcarra@cgallp.com</a></td>
</tr>
<tr>
<td>Michael Herz</td>
<td>(203) 731-1577</td>
<td><a href="mailto:Michaelbherz@gmail.com">Michaelbherz@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 2018-2019**

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

- **02/14/19 @ 8 a.m.** CONFERENCE CALL
  (Call #: 605-475-4085, Access Code: 353212#)

  **FUTURE BOARD MEETINGS:**
  - 03/21/19 @ 8 a.m. - CONFERENCE CALL
  - 04/18/19 @ 8 a.m. - CITY LIMITS DINER

**NEXT NEWSLETTER - APRIL 2019**

**HAPPY VALENTINE’S DAY <3**