



The New York State Society of Certified Public Accountants



Westchester Chapter E-Newsletter

January 2019

PLEASE JOIN US AT THE:



NYSSCPA Westchester Chapter's Managing Partner's Breakfast

When: Wednesday, January 23, 2019

Time: 8:00 a.m. - 9:30 a.m.

Location:
Renaissance Hotel
 80 W Red Oak Ln
 West Harrison, NY 10604

DON'T MISS THIS IMPORTANT BREAKFAST!

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Michael Herz

President-Elect

Heather Oboda

Vice President

Gwendolyn Horn

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Matthew Katz

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Catherine M. Censullo

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From Chapter President Michael Herz...



We are now in the New Year and I took notice while rehabbing my new knee, that the gym seems very crowded now. It seems like a lot of people made getting back in shape their New Year's resolution. Let's see how crowded it is next month. Believe me, I am not a pessimist, but I am a realist. New Year's resolutions are nice, but few of us really commit to them because they often involve completely changing our way of life or lifestyle, which is REALLY HARD. Rather than trying to do that, I would advocate that we should each take a "baby-step" in the right direction, whatever that might be. A 1,000-mile journey starts with the first step. Let's take a step towards that journey and see how it feels. If it feels okay, let's follow by taking the next step, and so on. We may not end up being transformational with our lives or develop any positive new habits, but we will be moving in the right direction.

Upcoming Chapter programs include the Accountants in Industry Committee with a CPE session on Jan. 16th on Business Insurance and the Managing Partner's Breakfast on Jan. 23, 2019 at The Renaissance Hotel. All Board and Committee Members are encouraged to attend. The Local Practitioners Committee is actively considering merging with the Tax Committee. The newly reorganized Accounting and Auditing Committee is putting together a program for May. The Diversity Committee is busy planning a program for some time in the spring which had been originally planned for October. The Estate and Financial Planning Committee is planning a CPE morning session (3 hours) for some time in February and the Sponsorship Committee is actively working to develop sponsorships in coordination with each of the Committee Chairs. The Golf Committee is in the early stages of registering both golfers and sponsors for this summer's outing. The budget for 2019-20 is being developed and will be voted on at the January Board Meeting. The Nominating Committee has been formed and is developing its slate of Officers and Directors.

I have continued to reach out to all the Committee Chairs to ask them to consider which of their committee members might be a good fit to step up and take on leadership roles as Assistant Chair. This effort should result in generating fresh faces with Committee experience and the willingness to serve on the Board, so that the Board has its own succession plan in place. I hope to provide further positive updates on this initiative as the year continues.

Best Regards,

Michael Herz

Michael Herz can be reached by phone at (203) 731-1577 or by e-mail at michaelbherz@gmail.com

**JOIN US AT THE
ACCOUNTANTS IN INDUSTRY COMMITTEE
OF THE NYSSCPA WESTCHESTER CHAPTER
WEDNESDAY JANUARY 16, 2019**

BUSINESS INSURANCE FOR TODAY'S WORLD

Are your current policies sufficient?

What if:

- There's a Flood
- Cyber Attack
- Officers are Sued
- Computers Go Down for two Days

Protect your assets by having the right insurance policies and levels of coverage for your firm and clients.

Gone are the days when a General Liability and an Umbrella policies were sufficient!

Beth Hoffman of Rosen Insurance will provide an overview of the various policies and why you need them.

**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 (pending approval)
Under the new Accountancy law all CPAs in industry are subject to the
CPE regulations. – Course Number 29112906.**

**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.**



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, 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

* 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 **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

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

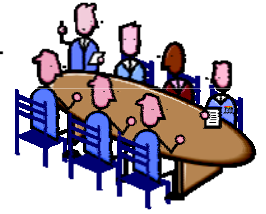
Access Code: 2589247

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, Controllars, 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@sunvwcc.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@mgrouppusa.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@cmcensullocpa.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@marksapath.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, gre@mdccpa.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, Gre@mdccpa.com

2018-2019 CALENDAR

<u>Date</u>	<u>Program/Activity/Event</u>	<u>Time</u>
01/16/2019	Business Insurance Update - Accountants in Industry CPE	7:45 a.m. - 9:00 a.m.
01/23/2019	Westchester Chapter Managing Partner's Breakfast	8:00 a.m. - 9:30 a.m.
03/02/2019	Tax Hotline Event	9:00 a.m. - 12:00 p.m.
07/23/2019	Annual Golf Outing Event	All Day Event

<u>Newsletter Committee</u>	<u>Phone</u>	<u>E-Mail</u>
Licia Vizcarra	(914) 294-2500	lvizcarra@cgallp.com
Michael Herz	(203) 731-1577	Michaelbherz@gmail.com

(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

CPA Certificate No. / _ / _ / _ / _ / _ / _ / _ / _ / _ /
 Name: (Last, First, Middle Initial)

CPA Certificate No. / _ / _ / _ / _ / _ / _ / _ / _ / _ /
 Name: (Last, First, Middle Initial)

Firm Name _____
 Firm Address _____
 City, State, Zip _____
 Business Phone () _____

Firm Name _____
 Firm Address _____
 City, State, Zip _____
 Business Phone () _____

FUTURE BOARD MEETINGS 2018-2019

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

01/17/19 @ 8:00 a.m. CITY LIMITS DINER

Future meetings:

2/14/19 @ 8 a.m. CONFERENCE CALL

(Call #: 605-475-4085, Access Code: 353212#)

NEXT NEWSLETTER - FEBRUARY 2019



HAPPY NEW YEAR!

