HIGH SCHOOL VISITATIONS

The Westchester Chapter is looking for volunteers to speak at local high schools regarding the accounting profession.

To sign up or for more info, please contact Gina Riga at ginarigacpa@optonline.net

THANK YOU!

TAX HOTLINE ANNOUNCEMENT:

The Westchester Chapter in cooperation with The Journal News will host its annual tax hotline on Saturday, February 29th, 2020 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.

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!

What’s Inside ….

- High School Visitations Announcement
- Tax Hotline Announcement
- Accts in Industry CPE: Social Security
- Managing Partners Breakfast

Page 1 Annual Golf Outing
Page 1 Tax Planning Committee Meetings
Page 2 2019-2020 Chapter Committee Listing
Page 3 2019-2020 Events Calendar/Schedule
Maximizing the Benefits Available from the Social Security System

We welcome our speaker, Bonnie Yam, Managing Director of Pension Maxima Investment Advisory. Please join us in an informative discussion about the social security program and related ramifications. The brief outline of the program is as follows:

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 how to find out what their full retirement age
Attendees will be shown how to calculate their life expectancy
Attendees will see how their monthly benefits differ based on when they elect to begin benefits
Attendees will be taught the concept of “When is the best age to start your benefits?”
Attendees will be shown online applications for Social Security retirement, spouse’s, disability, and Medicare only benefits.
Attendees will be shown how to work with the Retirement Estimator, which gives estimates based on one’s actual Social Security earnings record using different scenarios
Attendees will be introduced to the Compassionate Allowances program - fast tracking benefits

PLEASE JOIN US IN THE 3RD FLOOR CONFERENCE CENTER OF SKADDE 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 29115007.

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.

Registrations may only be made online using this link: https://cpe.nysscpa.org/product/31050 or by phone through the NYSSCPA’s.
NYSSCPA Annual Managing Partners Breakfast

Representative of both the State Wide and the Westchester Board will be present to report on their respective boards activities.

More importantly, they are looking for your input.

This is your opportunity to tell us what is working, what’s not and where you would like the Chapter and the Society to aim their focus going forward.

If you are unable to attend, please arrange to have one of your other partners there to represent your firm.

**Meeting Details:**

**When:** Tuesday, January 21, 2020

**Time:** 8:00 a.m. to 10:00 a.m.

**Location:** Conference Room at 4 Manhattanville Road, Purchase NY

Breakfast will be served!

Please send all replies to Cheryl Garippa at cgarippa@citrincooperman.com
NYS SOCIETY OF CPA’S - WESTCHESTER CHAPTER
Proudly Announces
THE ANNUAL GOLF & NETWORKING EVENT
MONDAY, August 17th, 2020
WYKAGYL COUNTRY CLUB
1195 North Avenue – New Rochelle, NY (914) 636-8700

PAYMENT RECEIVED PRIOR TO DECEMBER 31ST, 2019 - $350

Next Gen members - $200, but limited to three foursomes

OPTIONS TO ATTEND:

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

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

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

*** 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 10:30 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 & Matt Katz, Co-Chairs

Westchester Chapter Golf Outing – MONDAY, August 17th, 2020

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:
Citrin Cooperman
709 Westchester Avenue
White Plains, NY 10604
Att’n: Matthew Katz, CPA
Telephone (914) 949-2990 ext 3363
E-Mail:  mkatz@citrincooperman.com
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 2019-2020

The Westchester Chapter has organized the following committees for the 2019-2020 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!

** 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.**
Gina Riga, Chair, (914) 646-4674, ginarigacpa@optonline.net

** 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.**
Ed Wells, Chair, (914) 345-5888 x110, ewells@pscpafirm.com

** 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
Franklin Asante, Co-Chair, (914) 606-6791, Franklin.Asante@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

** 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, gre@mdcocpa.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@mdcocpa.com

We need your support and participation!!!
## 2019-2020 Calendar

<table>
<thead>
<tr>
<th>Date</th>
<th>Program/Activity/Event</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/09/2020</td>
<td>Allied Professionals CPE Breakfast: Exit Planning</td>
<td>7:30 a.m. - 9:30 a.m.</td>
</tr>
<tr>
<td>01/15/2020</td>
<td>Accountants in Industry CPE Event - Social Security</td>
<td>7:45 a.m. - 9:00 a.m.</td>
</tr>
<tr>
<td>01/21/2020</td>
<td>Managing Partners Breakfast</td>
<td>8:00 a.m. - 10:00 a.m.</td>
</tr>
<tr>
<td>08/17/2020</td>
<td>Annual Golf &amp; Networking Event at Wykagyl Country Club</td>
<td>All Day Event</td>
</tr>
</tbody>
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### Future Board Meetings 2019-2020

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

- **01/21/2020 @ 8 a.m.** Joint with Managing Partners Breakfast  
  (Conference Room at 4 Manhattanville Road, Purchase NY)

**FUTURE BOARD MEETINGS:**  
02/20/2020 @8AM Conference Call, 04/23/2020 In-Person Location TBD

**Next Newsletter - February 2020**

### 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>Heather Oboda</td>
<td>(914) 949-2990 x3382</td>
<td><a href="mailto:hoboda@citrincooperman.com">hoboda@citrincooperman.com</a></td>
</tr>
</tbody>
</table>

(E-mail submissions to the newsletter committee no later than the 10th day of the month prior to publication.)

### Happy New Year to You & Your Loved Ones!