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From Chapter President Heather Oboda...

I am excited to start my term as Chapter President. I thank the members of the board and committees who did not run from the President’s dinner screaming when they heard all the tasks I have in store for them this year.

As I stated in my speech I want the chapter to be a chapter of active members. I asked for the assistance of the past president’s in the room to get their staff at all levels to become more active. I know from personal experience that with enough effort and guidance from those who came before how membership can pay off.

I called upon the NextGens to bring back the Young Professional Networking Events with other industries that we have had in the past. I want them to increase their charitable outreach. The NextGen’s first orders of business for the year starts with a kickoff meeting June 13th at 8am. Then a volunteer event at Feeding Westchester on June 28th.

We are starting the year with a full schedule of events. We have the Estate, Tax and Financial Planning Conference on June 7th at Doral Arrowwood, the Accountants in Industry Committee Meeting on June 12th, the NextGen kickoff meeting June 13th, the Allied Professionals have a morning event on June 18th at Doral Arrowwood, the Next Gen Committee is hosting their Feeding Westchester event on June 28th and the COAP program will be running from June 24th through the 27th. We are also pleased to announce there are slots still open for our annual Golf Outing, which will take place at Wykagyl Country Club in New Rochelle on July 23rd.

I hope you have an enjoyable summer.

Best Regards,
Heather Oboda

Heather Oboda can be reached by phone at (914) 949-2990 x3382 or by e-mail at hoboda@citrincooperman.com
NYSSCPAs Westchester Chapter’s 19th Annual Estate, Tax, and Financial Planning Conference for Accountants and Financial Planners

“What’s New in the World of Estate Planning?”

Friday, June 7, 2019 from 9 am - 5 pm

at the Doral Arrowwood
975 Anderson Hill Road, Rye Brook, NY 10573

Special Guest Speakers include
Blanche Lark Christerson, Esq., LL.M, Sharon Klein, Esq., LL.M, Lee J. Slavutin, M.D., CLU, and Bruce D. Steiner, Esq., LL.M

Topics will include:

Current Developments in Tax and Estate Planning
Impact of Section 199A on Trusts and Beneficiaries
Estate Planning with Life Insurance

The NYSSCPAs Extends a Special Invitation to Members of the Financial Planning Association of the Greater Hudson Valley. FPA Members are Eligible for the NYSSCPA Member Fee of $150

The Member Fee is $150 / Non-Member Fee is $175

For Further Program Details and Registration Information Visit
https://cpe.nysscpa.org/product/30427
JOIN THE ALLIED PROFESSIONAL GROUP OF WESTCHESTER
AT THEIR UPCOMING BREAKFAST EVENT:
Impending Legalization of Cannabis 2019:
The Buzzz for Businesses

IMPORTANT NOTE: This presentation does not offer CFP credits; however, it does offer 2 CPA CPE + 1.5 CLE

Tuesday, June 18, 2019
7:30am - 9:40am
Doral Arrowwood, Rye Brook, NY

DON'T MISS THIS GREAT PROGRAM!

Dear Members & Friends of the FPA Greater Hudson Valley Chapter, Westchester County Bar Association, and the Westchester Chapter of the New York State Society of CPAs:

Our panel of legal and accounting professionals will discuss hot topics for businesses in or looking to enter the cannabis industry in 2019, including an overview of the types of agreements needed, a look at business valuation issues and a discussion of the many tax issues facing cannabis businesses as a result of Internal Revenue Code Section 280E. The panelists will be:

James Landau, Esq.
Howard Fielstein, CPA, ABV, CFF, CFE, CIRA, CTP, ASA, CDBV
Douglas S. Trokie, Esq.
Robert Bernstein, Esq.

While you take advantage of this opportunity to network with your fellow CPAs, attorneys, and financial planning colleagues, you can also learn about the various legal, tax and accounting aspects of the impact of the legalization of cannabis on client interests.

Click here for panelist bios.

Seating is limited, so don't wait to register for this great event!
Reservations will be taken on a first come, first serve basis.

REGISTRATION DEADLINE: Thursday, June 13, 2019

TO REGISTER: Contact your Association Person below. Registration fee for members and non-members is $40.00. You will be provided registration confirmation required to attend the event. Breakfast is included in the price.

FPA Greater Hudson Valley
Marcia Kaplan, CFP®
To register, email marcia.s.kaplan@ampf.com
914-289-0700 x11
No CFP CE Credit will be offered for this presentation

NYSSCPA
Debb Mastromatteo
Click here to register
914-273-0777 (fax 914-273-1787)
2 CPA CPE Credits – Course Code: 29116002

Westchester County Bar Association
Fern Richter
Click here to register
914-761-3707 x20
1.5 CLE CE Credits

Click here for directions to the Doral Arrowwood,
975 Anderson Hill Road, Rye Brook, NY 10573
JOIN US AT THE
ACCOUNTANTS IN INDUSTRY COMMITTEE
WEDNESDAY JUNE 12, 2019

Using Revocable Living Trusts as an Effective Estate Planning and Probate Avoidance Tool

We welcome our speaker, Attorney Anthony Enea, Managing Partner of Enea, Scanlan & Sirignano, LLP. Please join us in an interactive and informative discussion on the planning options for the transfer of a primary residence. This session will cover:

1. Revocable Trusts – The Basics
   - Creation of the Trust
   - Funding the Trust
   - Naming Trustees and Alternate Trustees
   - Benefits of the Trust During Life

2. Revocable Trusts and Probate Avoidance
   - Benefits of the Trust After Grantor’s Death
   - Trust Administration

3. Revocable Trusts and Medicaid Planning

4. Hypotheticals/Q&A

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 29116001.

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.

New Registration Policy: To register for this session, you may register online with the link: https://cpe.nysscpa.org/product/30518 or Call 800-537-3635.
Westchester Chapter NextGen Committee invites you to join for a community outreach event.

Where: Feeding Westchester (Formerly Food Bank for Westchester)
200 Clearbrook Road, Elmsford, NY 10523

When: Friday, June 28th, 12:30 p.m. - 2:00 p.m.
Check-in and lunch from 12:00 p.m. - 12:30 p.m.
Volunteering 12:30 p.m. - 2:00 p.m., followed by networking, fun and games at Captain Lawrence Brewery

To sign up contact: Matthew Katz at mkatz@citrincooperman.com

Learn more about Feeding Westchester
At Westchester Community College  
**Monday, June 24, 2019 through Thursday, June 27, 2019**

Do you know a high school Junior who has an interest in business?

- All expenses paid by donations from CPAs through the educational branch of the New York State Society of CPAs.

- Sessions taught by CPAs and other business professional and include accounting, taxation, and financial literacy as well as professional development workshops such as goal setting, networking, and resume writing,

- Field trips to corporations and accounting firms.

**APPLICATION DEADLINE IS MAY 21, 2019!**

*Follow the link for a program description and application:*

**COAP Application**

For more information, contact:
Co-Chair, Professor Carolyn Christesen, CPA, MBA  
carolyn.christesen@sunywcc.edu  
Co-Chair, Tameka Walters, CPA  
t Walters@citrincooperman.com
The NYSSCPA Rockland and Westchester Chapters Present:

A Friends and Family Night at Palisades Credit Union Park Home of the Rockland Boulders to see the Rockland Boulders take on the Ottawa Champions

Date: Thursday, July 25, 2019

Gates Open: 6:00
Buffet: Starts at 6:30 p.m.
Game Starts: 7:00 p.m.
Location: Owner’s Suite

Cost: $50 per person – Members
      $60 per person – Non-Members
(Small children who sit on parents lap will be no charge)

The above cost includes your ticket to the game and a buffet with Hot Dogs, Hamburgers, Grilled Chicken, Salad, Dessert, Soda and Water
(Cash Bar or Concession Locations are Available for Alcohol Purchases)

Expect to pay a $5 parking fee per car on game day

We hope you will come and enjoy a night out with us!

Sign me up! Deadline: Monday July 22, 2019

**Online Registration**  https://cpe.nysscpa.org/product/30531

**Mail in Registration**  #of Tickets_________Amount enclosed ______________

Name______________________________________  Tele # ______________________________
Address____________________________________  E-Mail________________________________
_____________________________________________________________________________

Any Questions Contact:  shari@seberkcpapc.com or Phone # 845-634-2617
Make Check Payable to:  NYSSCPA-Rockland
Mail Check & Stub To:  Shari E Berk, CPA
                        4 Woodhaven Drive
                        New City, NY 10956
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:

<table>
<thead>
<tr>
<th>Lunch, Golf, Cocktail Hour, Buffet &amp; Dessert*</th>
<th>$375</th>
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<tbody>
<tr>
<td>Cocktail Hour, Buffet and Dessert Only</td>
<td>$150</td>
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* Includes greens fees, forecaddie, cart, and driving range

SPONSORSHIPS:

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<tr>
<th>LIMITED GOLD SPONSORSHIP: $1,900 includes</th>
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<tr>
<td>♦ Sign near tee box area that company sponsored the hole</td>
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<tr>
<td>♦ Table at registration desk</td>
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<tr>
<td>♦ Reserved tables at cocktail hour and dinner</td>
</tr>
<tr>
<td>♦ Recognition at dinner</td>
</tr>
<tr>
<td>♦ Lunch, golf, drinks and dinner for one</td>
</tr>
</tbody>
</table>

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 11:30 am, followed by a shotgun start at 1:00 pm. There will also be on-course refreshments. Cocktail “hour” and hors d’oeuvres will begin at approximately 6:00 pm with open bar. Prizes will be awarded during buffet dinner and throughout 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
**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@lepaterner.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
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 Schoifer, 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!!!
<table>
<thead>
<tr>
<th>Date</th>
<th>Program/Activity/Event</th>
<th>Time</th>
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<tbody>
<tr>
<td>06/07/2019</td>
<td>19th Annual Estate, Tax &amp; Financial Planning Conference</td>
<td>9:00 a.m. - 5:00 p.m.</td>
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<tr>
<td>06/12/2019</td>
<td>Accountants in Industry CPE Event - Revocable Living Trusts</td>
<td>7:45 a.m. - 9:00 a.m.</td>
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<tr>
<td>06/13/2019</td>
<td>NextGen 2019-2020 Organizational Meeting</td>
<td>8:00 a.m. - 9:00 a.m.</td>
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<td>06/18/2019</td>
<td>Allied Professionals Group Networking Breakfast</td>
<td>7:30 a.m. - 9:30 a.m.</td>
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<tr>
<td>06/24/2019-06/27/2019 COAP Event</td>
<td>Multiple Days Event</td>
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<td>06/27/2019</td>
<td>Audit &amp; Attest Sub-Committee Meeting</td>
<td>5:30 p.m. - 7:00 p.m.</td>
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<td>06/28/2019</td>
<td>NextGen Outing: Feeding Westchester</td>
<td>12:00 p.m. - 2:00 p.m.</td>
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<tr>
<td>07/23/2019</td>
<td>Annual Golf Outing Event</td>
<td>11:00 a.m. - 7:30 p.m.</td>
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<tr>
<td>07/25/2019</td>
<td>Rockland Westchester Boulders Game</td>
<td>6:00 p.m.-Game @7p.m.</td>
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**Newsletter Committee**

Licia Vizcarra  
(914) 294-2500  
lvizcarra@cgalp.com

Heather Oboda  
(914) 949-2990 x3382  
hoboda@citrincooperman.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**

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<tr>
<th>CPA Certificate No.</th>
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<td>City, State, Zip ......................</td>
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**FUTURE BOARD MEETINGS 2019-2020**

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

07/11/19 @ 8 a.m. CONFERENCE CALL

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

FUTURE BOARD MEETINGS:

TBD

NEXT NEWSLETTER - SEPTEMBER 2019

**HAPPY FATHER’S DAY!**

**ENJOY YOUR SUMMER!**