From Chapter President Matthew J. Katz

For many people, this has been the most trying year of their life. Most people did not set foot in their physical work place for the entire year. Kitchen tables were transformed into offices. Living rooms were turned into “remote schools.” Full faces could only be seen through video conferences. Vacations were a thing of the past. For some people, they haven’t been in the physical presence of their family for the last 15 months. Make no mistake, this has been a hard year. This has been a VERY hard year.

With all of the hardships also comes a newfound appreciation for what life was like pre-pandemic. No restrictions, no masks, no need for Clorox wipes everywhere you go. No need to worry about how you could get your hands on toilet paper. Leaving the house used to be easy, then it became more of a chore with a checklist of items you needed to cross off before leaving. But it’s what you make out of this new-found appreciation that will ultimately define us. So many things that were thought to be a given were taken away. So many things were taken for granted that I know I will look at differently moving forward.

We have now reached a moment in time where offices are re-opening, schools have students again, friends and family can gather and not need to worry about the “what ifs.” We made it through the darkest days, and my hope as incoming president is that together we can make 2021 an amazing year as we enter back into the light. This is the year that in-person events return! This is the year you see your colleagues face to face again! It’s not going to be easy, and we all need to work together. I’m up for the challenge, and I hope you all are too. And I’m VERY excited to see all your faces again!

Best Regards,
Matthew J. Katz

Matthew J. Katz can be reached at 914.949.2990 x3363 or by e-mail at mkatz@citrincooperman.com

What’s Inside ….

A Message from President Matthew J. Katz Page 1  Annual Tax Conferences Save the Dates Page 5
A Message from Past President Heather Oboda Scholarship Winners Announcement Page 6 Page 2  Tax Planning Committee Zoom Meetings Page 7
COAP Summer Program 2021-2022 Chapter Committee Listing Page 8 Page 3
Annual Golf Outing Event 2021-2022 Events Calendar/Schedule Page 9
From Outgoing President Heather Oboda…

As my term ends as President of the Westchester Chapter of the New York State Society of CPAs, I reflect upon the last two years of my presidency. I never thought as I stood in the ballroom at Willow Ridge Country Club that night in May 2019 what was ahead. From pandemic to new possible tax legislation and everything in between we as a society have had to adapt and react quickly to help our members and their clients.

To begin the chapter and the society quickly moved to having meetings and educational programs online via Zoom. No longer can you grab a few Munchkins and drink coffee in person with Accountants in Industry however, attendance has increased over the year focusing on a variety of topics from Human Resource Update in the Wake of a Covid-19 Pandemic to Networking in a Post Covid Environment. Our Tax committee continued to meet monthly the first Wednesday of the month via Zoom to go over new tax law changes that have come up. In addition, they held tax updates the end of the 2020 in connection with the Mid-Hudson and Rockland Chapters. We were also happy to co-host an A&A Committee education event with Mid-Hudson in 2020. Record numbers of members sat in a virtual meet the IRS event. Our Tax Hotline was able to be held remotely, which allowed society members to take calls from members of the community. Our Scholarship Committee continued to review applications and gave five to six $1,000 scholarships the last two years.

While the chapter continued as business as usual, the NYSSCPA statewide started to advocate for practitioners and their clients. They worked hard to get the New York and Federal due dates extended for both tax years. They were able to have New York allow electronic signature signatures instead of “wet” signatures for clients and preparers that would have been difficult to obtain and risky during the pandemic. The Society also began to put out educational materials for members to serve their clients on topics such as PPP and other CARES Act tax law changes.

Going forward as restrictions are lightening there will be a move to in person events. The first in-person event the Westchester Chapter is excited to hold is Annual Golf and Networking Event on Monday August 16th. Our Annual Tax Conferences are scheduled in two parts November 2nd and 3rd, right now as virtual events. The annual COAP Career Opportunities in the Accounting Profession will be held this year June 28th and 29th at Westchester Community College. This program was developed to introduce underrepresented high school students to accounting and finance careers and is still accepting application.

To close, I am happy to say that that New York State Society of CPAs was able to pivot when needed to meet the needs of its members and their clients. I am confident that as more tax legislation and accounting regulations come out the Society and its chapters will be ready.

I wish the incoming President of Westchester Chapter Mathew Katz the best as be begins his term. As well as Rumbi Bwerinofa-Petrozzello, incoming president of the NYSSCPA.

Regards,

Heather Oboda
Past President

Heather Oboda can be reached at 914.949.2990 x3382 or by email at hoboda@citrincooperman.com
COAP—Career Opportunities in the Accounting Profession—is a FREE program, developed to introduce promising underrepresented high school students to accounting and finance careers. You will meet successful business leaders and get need-to-know college tips.

COAP helps you explore what you can do in the accounting field. If you think accounting is just taxes, think again. Plot your future as a Chief Financial Officer, forensics investigator, data analyst, cybersecurity consultant, entertainment and sports agent, auditor or entrepreneur.

Because COAP is virtual, you can apply for the COAP program hosted by a college near you AND meet students from across the state who share your interests.

Apply Now at nysscpa.org/APPLYCOAP
NYS SOCIETY OF CPA’S - WESTCHESTER CHAPTER
Proudly Announces, the triumphant return of
THE ANNUAL GOLF & NETWORKING EVENT
MONDAY, August 16th, 2021
WYKAGYL COUNTRY CLUB
1195 North Avenue – New Rochelle, NY (914) 636-8700

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

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
♦ Lunch, golf and drinks and dinner for one
♦ Recognition at dinner

* 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 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 though 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 & Matthew Katz, Co-Chairs

Westchester Chapter Golf Outing – MONDAY, August 16th, 2021

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
☐ Cocktails 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
SAVE THE DATES:

Westchester Annual Tax Conferences

When: Tuesday, November 2nd — Part 1
       Wednesday, November 3rd — Part 2

Time: 8:30 a.m. - 12:30 p.m.

For more information please contact:
Greg Re - gre@mdcocpa.com or 203-327-7151,
or John Brant - jbrant@pkfod.com or 914-341-7626

The Westchester Chapter Needs You!

If you are interested in joining a committee or the board or know
someone that would like to be involved, please reach out to
Matthew Katz at 914-949-2990 x3363 or e-mail at
mkatz@citrincooperman.com

We look forward to hearing from you!
Thank you for your continued support!
Special Announcement from The NYSSCPA Westchester Chapter:

The Westchester Chapter Accounting Careers/High School Program Committee offers deserving high school seniors, who have committed to enter the accounting profession and pursue accounting as a major in college, a chance to win a scholarship of up to $1,000.00. Each applicant must reside in Westchester County. Applicants are selected for the scholarship based on GPA, extracurricular activities, an essay, recommendation letters and timely submission of the information.

2021 Westchester Chapter High School Scholarship Award Winners:

**Alison Zeng – Byram Hills High School:** Alison will be attending CUNY Baruch College; She has excelled academically, actively gives back to her community and has a sincere interest in becoming an accountant and financial analyst.

**Julianna DiCostanzo – Harrison High School:** Julianna will be attending Villanova University; She has challenged herself with an IB Diploma program and has excelled academically; she has a passion for community service and has shown great initiative throughout her high school years.

**Angelina Joson – Maria Regina High School:** Angelina will be attending Northeastern University; She has excelled academically in high school; she has a passion to succeed and commits to working hard. She aspires that her work will benefit others and sees herself achieving that aspiration with a career in accounting.

**Marina Panella – Maria Regina High School:** Marina will be attending Iona College; she has excelled academically and has shown determination and great interest in becoming a CPA. She values education and expressed it with a quote from Benjamin Franklin: “An investment in knowledge pays the best interest”.

**Raffaele Tammaro – Stepinac High School:** Raffaele will be attending Fordham University; he not only excelled academically but also has been actively involved in many extracurricular activities both in school and outside of school; Raffaele also created his own business with his sister to benefit the community. He has a passion to become a CPA for one of the Big Four.
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 “ZOOM” MEETING! 

When: 1st Wednesday of each month 

Join from PC, Mac, Linux, iOS or Android: 

https://nysscpa.zoom.us/j/92569272621?pwd=emdiQ2hLU0V3emJYTmpWNHplKzBhQT09

Password: 056334

Or by Phone Dial:  
+1 646 876 9923 (US Toll)  
+1 312 626 6799 (US Toll)  
+1 301 715 8592 (US Toll)  
+1 253 215 8782 (US Toll)  
+1 346 248 7799 (US Toll)  
+1 669 900 6833 (US Toll)  
855 880 1246 (US Toll Free)  
Meeting ID: 925 6927 2621

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 2021-2022

The Westchester Chapter has organized the following committees for the 2021-2022 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, (914) 954-6847, drubin6141@gmail.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, tamekawalters@yahoo.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, tamekawalters@yahoo.com
Clara Cohen, Co-Chair, Cohen.claram@gmail.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!
Matt Katz, Chair, (914) 949-2990, mkatz@citrincooperman.com

** 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@mgroupngusa.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, tamekawalters@yahoo.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@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, greg@mdcocpa.com
## 2021-2022 Calendar

<table>
<thead>
<tr>
<th>Date</th>
<th>Program/Activity/Event</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/28/2021-6/29/2021</td>
<td>COAP Program</td>
<td>Two Day Program</td>
</tr>
<tr>
<td>8/16/2021</td>
<td>The Annual Golf &amp; Networking Event</td>
<td>All Day Event</td>
</tr>
<tr>
<td>11/2/2021</td>
<td>Westchester Tax Conference Part 1</td>
<td>8:30 a.m. - 12:30 p.m.</td>
</tr>
<tr>
<td>11/3/2021</td>
<td>Westchester Tax Conference Part 2</td>
<td>8:30 a.m. - 12:30 p.m.</td>
</tr>
</tbody>
</table>

---

### 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>Matthew J. Katz</td>
<td>(914) 949-2990 x3363</td>
<td><a href="mailto:mkatz@citrincooperman.com">mkatz@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.)*

---

### Future Board Meetings 2021

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

**Next Board Meeting:**

6/16/2021 @ 9:00 a.m. - ORGANIZATIONAL MEETING (ZOOM)

**Next Newsletter - September 2021**

---

**Enjoy Your Summer!**

**Stay Well!**