ACCOUNTANTS IN INDUSTRY COMMITTEE OF THE NYSSCPA WESTCHESTER CHAPTER

WEDNESDAY, MAY 15, 2019
“HOT TOPICS IN EMPLOYMENT LAW”

Our speaker Penny Lieberman will give an update on Human Resources Law, she will touch on Paid Family Leave and Harassment in New York State.

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

SAVE THE DATE:
ALLIED PROFESSIONALS GROUP NETWORKING BREAKFAST EVENT
WHEN: TUESDAY, JUNE 18TH
TIME: 7:30 A.M. - 9:30 A.M.
TOPIC: BUSINESS & ACCOUNTING ISSUES RELATING TO THE LEGALIZATION OF MARIJUANA
LOCATION: TBD

What’s Inside ....

- Accountants In Industry May CPE Event
- Allied Professionals Breakfast
- President’s Message
- President’s Dinner Reception
- Estate, Tax & Financial Planning Conf.
- Accountants In Industry June CPE Event

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Welcome May!
From Chapter President Michael Herz…

It looks like we made it through another tax season in one piece, with a little less hair, perhaps a few more gray hairs and a little sleep deprived. Our Chapter’s fiscal year-end events have been planned and we are all looking forward to some time away from the office during this upcoming summer season.

The COAP Committee has planned its annual event this year for June 24-27 with J. Michael Kirkland to be the Keynote Speaker at the dinner on June 27th. The Estate and Planning Committee has scheduled their annual Conference for June 7th. The recently resurrected Accounting and Auditing Committee is in the process of planning their CPE session for some time in June. The Scholarship Committee is in the process of vetting high school students who have submitted their applications. The Golf Committee is in process of filling out the remaining foursomes and sponsorship opportunities and anticipates a great turnout for the July 23rd Golf Outing at the Wykagyl Country Club. The President’s Dinner is set to take place on May 16th at the Willow Ridge Country Club and we encourage all members of the Chapter to attend. The Organizational Meeting has been planned for May 22nd.

As I begin to contemplate my year as President, I look towards the Chapter and its Committees, run by very conscientious and talented individuals and ask myself, “What will my legacy be as President?” I hope it will be that I was hard-working with certain specific goals in mind, which, if the Chapter did not achieve this past year, is pointed in the right direction to achieve in the near future. Making sure that our Committees stay active and offer current content and programming for our members, including the resurrection of our Accounting & Auditing Committee and the merging of our Small Practitioners and Tax Committees. We were also able to attract some new talent onto our committees and onto our Board, which can only be a positive sign towards an overall Board continuity plan. So I believe I have made several significant contributions as the leader of our Chapter over the past year, even with two knee replacement surgeries.

I look forward to seeing many of you at the President’s dinner on May 16th, as I turn over the Chapter leadership into the capable hands of Heather Oboda, a Director with Citrin Cooperman. Heather has been on the Board for many years and only recently graduated out of the Next Gen Committee. In fact, given her current age and years on the Board, she must have joined as a teenager. Maybe not, but she certainly has that youthful appearance. Don’t let that fool you though, as I believe she will be a very thoughtful and dynamic leader for our Chapter over the next year. I wish Heather all the best in her upcoming year as President.

Best Regards,

Michael Herz

Michael Herz can be reached by phone at (203) 731-1577 or by e-mail at michaelbherz@gmail.com
The NYSSCPA Westchester Chapter hosts its:

**Annual President’s Dinner/Reception**

Honoring the Chapter’s 2018-2019

President, Michael Herz

&

Welcoming the Chapter’s incoming 2019-2020

President, Heather Oboda

**Date:** Thursday, May 16, 2019  
**Location:** Willow Ridge Country Club 123 North St. Harrison, NY 10528  
**Time:** 6:00 p.m. – 9:00 p.m.  
(Cocktail Reception beginning at 6:00 p.m.)  
**Cost:** $65 per person

[CLICK HERE TO REGISTER/PAY ONLINE!](#)  
Contact: Licia Vizcarra for more information and/or to register at 914-997-7724 or e-mail at lvizcarra@cgallp.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

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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

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For Further Program Details and Registration Information Visit
https://cpe.nysscpa.org/product/30427
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:

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

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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.
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](mailto:carolyn.christesen@sunywcc.edu)
Co-Chair, Tameka Walters, CPA
[t Walters@citrincooperman.com](mailto:t Walters@citrincooperman.com)
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!

** 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@lepater.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, RFE@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@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, riterrano@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@mdcoeca.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@mdcoeca.com

We need your support and participation!!!
For ALL Newsletter Mailing Issues - Use This Form or Call (212)719-8333

CPA Certificate No. /___/___/___/___/___/___/
Name: (Last, First, Middle Initial)
Firm Name
Firm Address
City, State, Zip
Business Phone (  )

CPA Certificate No. /___/___/___/___/___/___/
Name: (Last, First, Middle Initial)
Firm Name
Firm Address
City, State, Zip
Business Phone (  )

Date | Program/Activity/Event | Time
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05/15/2019 | Accountants in Industry CPE Event - Hot Topics in Employment Law | 7:45 a.m. - 9:00 a.m.
05/16/2019 | President’s Dinner Reception | 6:00 p.m. - 9:00 p.m.
05/22/2019 | Organizational Meeting | 5:00 p.m. - 8:00 p.m.
06/07/2019 | 19th Annual Estate, Tax & Financial Planning Conference | 9:00 a.m. - 5:00 p.m.
06/12/2019 | Accountants in Industry CPE Event - Revocable Living Trusts | 7:45 a.m. - 9:00 a.m.
06/18/2019 | Allied Professionals Group Networking Breakfast | 7:30 a.m. - 9:30 a.m.
06/24/2019-06/27/2019 | COAP Event | Multiple Days Event
07/23/2019 | Annual Golf Outing Event | All Day Event

Newsletter Committee
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.)

FUTURE BOARD MEETINGS 2018-2019
(Board Meetings are generally the 3rd Thursday Morning of the month. Exceptions are noted)

05/16/19 @ 5 p.m. at WILLOW RIDGE COUNTRY CLUB
(Prior to President’s Dinner/Reception)

FUTURE BOARD MEETINGS:
05/22/19 @ 5 p.m. ORGANIZATIONAL MEETING
06/13/19 BOARD MEETING

NEXT NEWSLETTER - JUNE 2019

HAPPY MOTHER’S DAY!