NYSSCPA Westchester Chapter’s Tax Conferences

Part II - December 4th, 2017

Time: 8:30 a.m. - 5:00 p.m.
(Registration/Check-In at 8:00 a.m.)

Location:
Doral Arrowwood
975 Anderson Hill Rd, Rye Brook, NY 10573

8 CPE (Taxation)
Course Codes:
Part II 28611835

Member/Non-Member Fee: $150/$200

CLICK BELOW TO REGISTER NOW:
PART II
Dear Fellow Westchester Chapter Members,

Diversity is a topic that is in the forefront of people’s minds right now. I recently attended an event co-sponsored by United Way of NYC and Deloitte on Diversity in the Workplace.

Although I knew that diverse thinking led to better decisions and teams, I didn’t realize it impacted in the bottom line in such a dramatic fashion. The findings show that diverse teams are more effective, and profits are larger when the workforce is more diverse.

Our chapter recently held a diversity event at Mercy College as well that highlighted a lot of the same issues. It’s important to our chapter to host such events as these to help our members consider these issues in their daily lives. Thank you to Gwen Horn and Denise Stefano for such a great event!

For upcoming events check out of chapter webpage for registrations. We have our annual ethics event as well as the highly sought-after tax seminars. We look forward to seeing you at an event, or two, soon!

Sincerely,

Gina Goodenow

Gina Goodenow can be reached by phone at (212) 251-4042 or by e-mail at GinaGoodenow@gmail.com
IRS’s Stakeholder Liaison: partnering with organizations serving tax professionals, small businesses and self-employed taxpayers

IRS’s Stakeholder Liaison organization is unique among its peers. While other IRS functions are collecting taxes or examining returns, Stakeholder Liaison gives away its goods, providing tax professionals and the small business community the latest tax information and resources the IRS has to offer – and at a price that can’t be beat: for free.

**Reach out and teach** – Local stakeholder liaisons collaborate with tax professional organizations, small business groups and industry associations to provide tax education and information for their members. Stakeholder liaisons also participate in tax-related events throughout the country, including the annual [Nationwide Tax Forums](https://www.irs.gov/businesses/small-businesses-self-employed/national-tax-forums) for tax professionals.

Local stakeholder liaisons conduct small business forums, opportunities for government agencies and small business organizations to exchange ideas and discuss current and emerging issues. Stakeholder liaisons also host practitioner liaison meetings with representative groups of local tax professionals. These events open up dialogue between the IRS and the tax professional and small business communities.

Stakeholder Liaison delivers educational initiatives indirectly by supporting and assisting organizations that deliver Small Business Tax Workshops. Stakeholder Liaison also coordinates free, large-capacity webinars via the Internet that deliver comprehensive information on pertinent tax topics in a personal way. Search IRS.gov: [tax workshops](https://www.irs.gov/businesses/small-businesses-self-employed/tax-workshops) for more information on SBTW and [webinars](https://www.irs.gov/businesses/small-businesses-self-employed/webinars) for more information about webinars.

**Resolve the issue** – IRS’s [Practitioner Priority Service](https://www.irs.gov/businesses/small-businesses-self-employed/practitioner-priority-service-ppo) (866-860-4259) is the tax professional’s first stop for tax account-related issues, but if you encounter an issue with an IRS program or policy, raise it with your local stakeholder liaison. If the issue is significant nationally, the liaison may put it into the Issue Management Resolution System, which IRS uses to capture, report on and respond to issues that practitioners and small business leaders bring to the agency’s attention. The IMRS page on IRS.gov contains a monthly summary of new and resolved issues, the IMRS Hot Issues report and the Industry Issues Quarterly report, as well as a link to your local Stakeholder Liaison contacts. Search: [IMRS](https://www.irs.gov/businesses/small-businesses-self-employed/issue-management-resolution-system).

**Read all about it** – The IRS issues news briefs via two electronic newsletters written specifically for tax professionals and small businesses. [E-News for Tax Professionals](https://www.irs.gov/newsroom/e-news-for-tax-professionals) links to IRS news and information for tax pros and often addresses topics submitted by practitioners via their local stakeholder liaisons. [E-News for Small Businesses](https://www.irs.gov/businesses/small-businesses-self-employed/e-news-for-small-businesses) is tailored for small business owners and self-employed individuals. Visit IRS.gov and search: [subscription](https://www.irs.gov/newsroom/e-news-subscription-tool) to subscribe to these and other IRS newsletters.

Senior Stakeholder Liaison Linda Henson is the relationship manager assigned to the NYSSCPA - Westchester Chapter. Linda has a wealth of experience and knowledge of IRS processes, programs and procedures and can assist our members navigate the IRS system. You can reach Linda at [Linda.Henson@irs.gov](mailto:Linda.Henson@irs.gov) or (718) 834-3520 – Monday thru Thursday 7:00 am – 5:30 pm.
NYSSCPA Westchester Chapter
CPA Ethics Update- General Ethics

When: Nov. 7th, 6:00–8:00 p.m.  
(check-in at 5:30 p.m.)

Where: 800 Westchester, 800 Westchester Ave., Rye Brook, NY 10573

CPE: 2 (general ethics)

Cost: $35/$42 Members/Non Members

Overview
A hallmark of the public accounting profession is its commitment to professional ethics and the public interest. This course meets the New York State (NYS) ethics CPE requirement in general studies.

Who Should Attend
Primarily for all NYS licensed CPAs who need to learn the basics about the profession’s ethics standards.

Click Here to Register Online

For more info please call 800-537-3635
Tuesday, November 14 | 9:30 a.m. – 11:30 a.m.

**Sponsored** by the Westchester Chapter of the NYSSCPA

**Location:** Crowne Plaza Hotel, 66 Hale Avenue, White Plains NY

**CONFIRMED:** Assemblywoman Shelley Mayer; Assemblyman David Buchwald

**INVITED:** State Senator Jeffrey Klein; Assemblywoman Sandy Galef

RSVP to our Government Relations department at govtrelations@nysscpa.org or, for immediate assistance, contact our General Counsel, Joanne Thelmo at 212-719-8364.
JOIN US AT THE
ACCOUNTANTS IN INDUSTRY COMMITTEE
WEDNESDAY NOV. 15, 2017

LONG-TERM CARE WORKSHOP FOR CPA’S

We welcome our speakers, Jason Schwartz, CTLC, a long-term care product consultant and Heidi Donoghue, CPA, an Agent, both within New York Life Insurance Company. Please join us in an interactive and informative discussion on the various long-term care issues and strategies. This session will cover:

- Understanding the long-term care issue
- Funding sources for long-term care
- The Long-Term Care Insurance (LTCi) solution
- LTCi tax incentives
- Questions / review

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 29116802.

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.
NYS SOCIETY OF CPA’S - WESTCHESTER CHAPTER
Proudly Announces
THE ANNUAL GOLF & NETWORKING EVENT
MONDAY, August 13th, 2018

WYKAGYL COUNTRY CLUB
1195 North Avenue – New Rochelle, NY (914) 636-8700

PAYMENT RECEIVED PRIOR TO DECEMBER 31ST, 2017 - $350

Next Gen members (and their guests under 40 years of age) - $200, but limited to three foursomes

OPTIONS TO ATTEND: SPONSORSHIPS:

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

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 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, Chairman

Westchester Chapter Golf Outing – August 13th, 2018

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 Doug Ruttenberg at druttenberg@pkfod.com or call 914-341-7064
Chapter Committees and Major Events Planning 2016-2017

The Westchester Chapter has organized the following committees for the 2016-2017 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, (212) 935-4400, drubin@lepatner.com
Michael Herz, Co-Chair, (914) 662-2525, 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.
Frank Pellegrino, Co-Chair, (914) 345-5888, FPellegrino@pscpafirm.com
Carolyn Christesen, Co-Chair, (914) 606-6876, Carolyn.Christesen@sunywcc.edu

** 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

** 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 - To coordinate monthly programs.
Stephen Franciosa, Co-Chair, (718) 885-9191, sfranciosa@iona.edu
Catherine Censullo, Co-Chair, (914) 997-7724, Catherine.Censullo@cmeensusulocpa.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
Mark G. Leeds, Co-Chair (914) 468-7313, mleeds@winprop.com

** ANNUAL RECRUITMENT EVENT - Coordinate annual event with local colleges, students and business people.
Michele Lazzara, Co-Chair, (914) 909-3421, mlazzara@markspaneth.com
Heather Oboda, Co-Chair, (914) 949-2990 x3382, hoboda@citrincooperman.com
Denise Stefano, Co-Chair, (914) 674-7779, dstefano@mercy.edu

** SPONSORSHIPS - Coordinate with institutions who might sponsor Chapter events.
Richard Terrano, Chair, (212) 330-6085, rterran0@markspaneth.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 routable discussion/meetings.
Doug Ruttenberg, Chair, (914) 381-8900, druttenberg@odpkf.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

** GOLF OUTING - Help organize the annual outing. Major networking opportunity!
Jeffrey A. Schwartz, Chair, (914) 286-6908, jschwartz@eba.nyc
2017-2018 Calendar

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<thead>
<tr>
<th>Date</th>
<th>Program/Activity/Event</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/06/2017</td>
<td>Tax Conference Part I</td>
<td>8:00 a.m. - 5:00 p.m.</td>
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<tr>
<td>11/07/2017</td>
<td>Ethics CPE Event</td>
<td>6:00 p.m. - 8:00 p.m.</td>
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<tr>
<td>11/14/2017</td>
<td>Westchester Chapter Legislative Breakfast</td>
<td>9:30 a.m. - 11:30 a.m.</td>
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<tr>
<td>11/15/2017</td>
<td>Long-Term Care Workshop for CPA’s (Accountants in Industry)</td>
<td>7:00 a.m. - 9:45 a.m.</td>
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<tr>
<td>12/04/2017</td>
<td>Tax Conference Part II</td>
<td>8:00 a.m. - 5:00 p.m.</td>
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<tr>
<td>08/13/2018</td>
<td>Annual Golf Outing</td>
<td>All Day Event</td>
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Future Board Meetings 2017

<table>
<thead>
<tr>
<th>Date</th>
<th>Program/Activity/Event</th>
<th>Time</th>
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<tbody>
<tr>
<td>11/15/17 @ 6:30 p.m.</td>
<td>Pellegrino Saccomani &amp; Wells</td>
<td>(772 Commerce St, Thornwood)</td>
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<tr>
<td>12/21/17 @ 8:30 a.m.</td>
<td>Conference Call</td>
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Next Newsletter - December 2017

Best Wishes for a Plentyful Thanksgiving

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