NYSSCPA Westchester Chapter’s Tax Conferences

Part I - November 6th, 2017
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 I 28611834
Part II 28611835

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

CLICK BELOW TO REGISTER NOW:
PART I
PART II

What’s Inside ....

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From Chapter President Gina Goodenow…

Dear Fellow Westchester Chapter Members,

Even though we only have a few months left to the year we have our calendar packed for events for you!

The annual Accountants in Industry Conference, hosted by Webster Bank will be held on October 18. This provides lots of great information about topics specific to those CPAs who are not in public practice. I’ve been to them in the past and not only did I gain knowledge I was able to network with other accountants and extend my relationships throughout the community.

Speaking of networking, look for registration for a great opportunity on October 20th at Mercy College. The topic is The Recruiting, Retaining, and Managing of a Diverse Workforce.

Need to meet your education requirements for ethics credits? Our annual ethics conference will be held this year on November 7th.

We haven’t forgotten our tax folks either. Our two annual tax events are coming up on November 6th and December 4th both at the Doral Arrowwood. Thanks to our tax committee who works hard every year to put on fantastic all day programs.

I am currently looking for ideas on how to integrate a charitable component to these so please reach out to me with any ideas you may have.

I look forward to seeing you at a future event!

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 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 for more information on SBTW and webinars for more information about webinars.

Resolve the issue – IRS’s Practitioner Priority Service (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.

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 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 is tailored for small business owners and self-employed individuals. Visit IRS.gov and search: subscription 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 or (718) 834-3520 – Monday thru Thursday 7:00 am – 5:30 pm.
WEDNESDAY, OCTOBER 18, 2017

Member Pricing: Only $149!
($190 for Non-Members)

Focusing On the Biggest Issues Facing Today's Industry Sector

- Planning for the Enactment of New York's Comprehensive Paid Family Leave Policy
- Economic Outlook under the Trump Administration
- Developing Cybersecurity Plans and Procedures to Lessen the Threat of an Attack on Your Company
- Current New York State Tax Issues That You Need to Be Aware Of

Click on the image below to register:

Featured Speakers

Debbie A. Cutler, CPA/CFF, CFE, CCEP, President, Debra A. Cutler, CPA, P.C., provides dispute and litigation services, including fraud investigations. She serves as a member of the American Institute of Certified Public Accountants Joint Trial Board and is a former chair of the NYSSCPA Professional Ethics Committee. Previously, she provided attestation and tax services to corporations for more than a decade as partner at Kramer Love & Cutler LLP and served as senior manager at Ernst & Young.

Timothy P. Noonan, Esq., is a Partner at Hodgson Russ LLP. In addition to being the New York State Residency Practice Leader, he is also a member his firm's State and Local Tax Practice Group and the Tax Dispute Resolution Practice Group, and focuses his practice on the resolution of New York State and City tax disputes. He is the author of a monthly column entitled, "Noonan's Notes on Tax Practice" in State Tax Notes, a national, multistate tax publication.
The New York State Society of CPAs (NYSSCPA) Westchester Chapter in collaboration with the Westchester/Fairfield Chapter of the Institute of Internal Auditors (IIA), and Mercy College host:

A Panel Discussion/Symposium, sharing best practices in

“The Recruiting, Retaining, and Managing of a Diverse Workforce”

Join us for some scintillating conversation during a panel discussion/symposium (with breakfast and networking) where talented executive accounting and business professionals from today’s top firms and corporations will share best practices in a variety of initiatives to support, manage, and grow workforce diversity!

This program is being offered at NO COST
(in connection with the NYSSCPA’s diversity and inclusion initiatives)

All are welcome!

Limited Seating Available • RSVP Required • RSVP at: vpeattie@mercy.edu

Agenda:

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<th>Time</th>
<th>Event</th>
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<tr>
<td>7:30AM</td>
<td>Registration, breakfast, and Pre-event Networking</td>
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<tr>
<td>8:20AM</td>
<td>Welcome Remarks by NYSSCPA, IIA, &amp; Mercy College</td>
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<tr>
<td>8:25AM</td>
<td>Introduction of Panelists</td>
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<tr>
<td>8:30AM</td>
<td>Panel Discussion/Symposium</td>
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<tr>
<td>10:00AM</td>
<td>Closing Remarks</td>
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**Date, Location, and Time:**
Mercy College – Main Hall Lecture Hall
555 Broadway
Dobbs Ferry, New York 10522
Friday, October 20th 7:30AM-10:15AM

With **Panel Moderator: Edie Magnus**, Mercy College Executive Director of Media and Innovation
(Former NBC and CBS News Correspondent, Anchor)

**Featured Panelists**

- **Maureen Bulleri**
  Northeast Region HR Director
  Protiviti

- **Bria Griffith**
  Senior Manager
  National Diversity and Inclusion Council Chair
  CohnReznick

- **Kevin Kubicki**
  Director – Talent (IBM Cloud)
  IBM

- **Rumbi Bwerinofa-Petrozzello**
  Principal
  Rock Forensics, LLC
  Chair, NYSSCPA Diversity and Inclusion Committee

- **Thalia Savonne Smith**
  Partner
  Deloitte
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
JOIN US AT THE 
ACCOUNTANTS IN INDUSTRY COMMITTEE 
WEDNESDAY NOV. 15, 2017 

LONG-TERM CARE WORKSHIP 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 SKADDDEN 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.
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

SPONSORSHIPS:

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<th>Description</th>
<th>Amount</th>
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<td>Lunch, Golf, Cocktail Hour, Buffet &amp; Dessert*</td>
<td>$375</td>
</tr>
<tr>
<td>Cocktail Hour, Buffet and Dessert Only</td>
<td>$150</td>
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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 – 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@odpkf.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

** 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 - To coordinate monthly programs.
Stephen Franciosa, Co-Chair, (718) 885-9191, sfranciosa@iona.edu
Catherine Censullo, Co-Chair, (914) 997-7724, Catherine.Censullo@cmecensullocpa.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, Co-Chair, (212) 330-6085, rterranz@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, mtkatz@citrincooperman.com
Greg Re, Co-Chair, (203) 327-7151, Gre@mdcocpa.com
**FUTURE BOARD MEETINGS 2017**

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

10/20/17 @ 8:30 a.m. - Conference Call

11/16/17 @ 6:00 p.m. (Pellegrino Saccomani & Wells)

12/21/17 @ 8:30 a.m. (Conference Call)

**NEXT NEWSLETTER - NOVEMBER 2017**

**TRICK OR TREAT?**

**HAPPY HALLOWEEN!**

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