SAVE THE DATE:

NYSSCPA Westchester Chapter’s Managing Partner’s Breakfast

When: Wednesday, January 23, 2019

Time: 8:00 a.m. - 9:30 a.m.

Location:
Renaissance Hotel
80 W Red Oak Ln
West Harrison, NY 10604

STAY TUNED FOR MORE INFO!

What’s Inside ....

Managing Partner’s Breakfast Page 1  Continuing Education Workshop Page 7-8
President’s Message Page 2  Annual Recruitment Night Page 9-10
Business & Industry Conference Page 3  NextGen Wine Tasting Event Page 11
Workplace Harassment Event Page 4  Ethics CPE Seminar Page 12
Allied Professionals CPE Event Page 5  Tax Planning Committee Meetings Page 13
Tax Conference Part 1 and 2 Page 6  2018-19 Chapter Committee Listing Page 14
2018-19 Events Calendar/Schedule Page 15
From Chapter President Michael Herz...

The summer has gone by quickly albeit a bit on the moist side. Hopefully, “monsoon season” is over and we can begin to enjoy drier, cooler weather. The Chapter is back up and running at full steam as well, with many upcoming programs. In addition to the upcoming Business and Industry Conference on Oct. 17th, for which Citrin Cooperman has been gracious to offer their conference room as a satellite location, we have scheduled our two tax conferences on Nov. 2nd and Dec. 17th.

In addition, I am very pleased to announce that we have resurrected the Accounting and Auditing Committee, which has been dormant for several years, the Recruiting Event, scheduled for Nov. 1st, which was not held last year, and the Managing Partner’s Breakfast, scheduled for Jan. 23, 2019, which was not held last year. We are also in the process of bolstering the Tax Committee membership and looking into scheduling the Legislative Breakfast.

During our August Board meeting, I put forth my initiative for a Board Continuity Plan. I asked Committee Chairs to reach out to members, asking them to step up within their respective Committees to take on leadership roles. This in turn would lead to fresh faces with Committee experience and the willingness to serve on the Board, so that the Board has its own succession plan in place. I hope to provide positive updates on this initiative as the year rolls on.

Best Regards,
Michael Herz

Michael Herz can be reached by phone at (203) 731-1577 or by e-mail at michaelbherz@gmail.com
Westchester Chapter Location
Citrin Cooperman & Company LLP
709 Westchester Avenue, Suite 200
West Harrison, NY 10604-3103

Click here to register
Join the New York State Society of CPAs (NYSSCPA) Westchester Chapter and the Mercy College School of Business Women’s Leaders Institute for an evening seminar and discussion:

“Identifying, Addressing, and Preventing Workplace Harassment”

Join us for an informative discussion on important and relevant workplace harassment topics:

- Understand what constitutes workplace harassment
- Recognize instances of workplace harassment
- Protocol to address workplace harassment situations
- Preventative measures to mitigate workplace harassment

AND MUCH MORE!

All are welcome! Food and Refreshments will be served!

LIMITED SEATING AVAILABLE

RSVP Required • RSVP at: ghorn@pkfod.com

Where: Mercy College, 555 Broadway Dobbs Ferry, NY (Victory Hall Building, Room 101)
Time: 5:30 p.m. – 7:30 p.m. (check-in will begin at 5:00 p.m.)
Date: Thursday, October 25th, 2018
Cost: None

**Featured Speakers**

Penny Lieberman, Esq.  
Principal Attorney  
Jackson Lewis, P.C.

Danielle Martin  
Director of Human Resources  
A&E Television Networks  
Past President, SHRM Westchester Chapter
You all hear the expected and sometimes unexpected statement from your client, “I am getting a divorce.” How will you help your clients through this situation? Whether you are a CPA, a financial planner, or an attorney, these changes will have a major impact on your clients and their families, and on the decisions your clients need to make going forward. How are you going to help them deal with these changes? What things do you need to consider as you assist them in this process?

While you take advantage of this opportunity to network with your fellow CPAs, attorneys and financial planning colleagues, you can also learn more about how to better assist your clients going through divorce.

We will have a panel of speakers to discuss the legal, financial and psychological aspects of the process and the impact to your clients and their family members. The panelists will be (click for bio):

- Philip S. Moran, Certified Divorce Financial Analyst, Merrill Lynch
- Ken Jewell, Esq. of Jewell Law, PLLC, a Matrimonial and Family Law Attorney
- Hilary Weiss Cooper, Ph.D., Clinical Psychologist

This is a great way to gain a new perspective on the aspects of divorce and how they affect your clients. Be more knowledgeable and better prepared to assist your clients. Learn who the key members of the divorce planning team are and how they can provide value to your clients. Hear the war stories of the panel members and understand some of the situations you may encounter. Come with your own stories to share as well. This will be an interactive session with time for questions and answers and is sure to be a treasure trove of useful information to add to your arsenal of tools.

Find out more about some of the land mines involved in planning and implementing a divorce. For those of you assist your clients make planning decisions, this is a must attend event.

There is much practical knowledge to be learned by the attorneys, CPAs, and financial planners alike in the handling of issues of concern to your clients in this difficult process. Enhance your knowledge and understanding of this area and gather resources to help your clients get the best advice going forward.

Take the time to network with your peers and colleagues and learn from their experiences and best practices. Gain more resources in the group you can turn to when you need more help.

Save the date and register for this most informative program. Seating is limited, so don’t wait to register for this great event. Information on continuing education credits available will be provided shortly.

Wednesday, October 31, 2018 - 7:30 a.m. – 9:30 a.m.
Doral Arrowwood - 975 Anderson Hill Rd, Rye Brook, NY 10573

Please register no later than Wednesday, October 24, 2018. Reservations will be taken on a first come, first served basis.

TO REGISTER:
Contact your Association Person or click on the link below.

Registration fee for members and non-members is $40.00. You will be provided a registration confirmation required to attend the event. Breakfast is included in the price.

We look forward to seeing you.
PLEASE JOIN US AT THE:

2018 ANNUAL TAX CONFERENCES

When:  Friday, November 2nd &
     Monday, December 17th

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

Time:  8:30 a.m. - 5:00 p.m.

Highlights:
Join us for tax updates on Federal and Multistate, Tax Planning, Estate and Medicare Planning

Speakers:
Peter D. Baum - PKF O'Connor Davies, LLP
Joseph Endres - Hodgson Russ LLP
Chaim V. Kofinas - Beacon Partners CPAs
Dean L. Surkin - JM CPA LLP

To Register for Part 1 please click below:
November Conference - Course Code 28611934
Part 2 Registration coming soon
December Conference - Course Code TBD

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

Date: October 24th, 2018
Time: 8:30 am to 12:00 pm
Location: PKF O’Connor Davies
500 Mamaroneck Avenue, Suite 301
Harrison, NY 10528

Hosted by: Bonnie Yam, Pension Maxima Investment Advisory

Earn Up to 21 CPE Credits*
Program Level: Advanced
Delivery Method: Group-Live; QAS-SS
Administrative Practice

LEARNING OBJECTIVES:

- Determine a Sustainable Withdrawal Rate;
- Identify the various sources of retirement income;
- Know the strategies to maximize social security benefits;
- Describe the various types of qualified retirement plans available through an employer—DB and DC plans, their features, benefits, and limitations;
- Describe the features, benefits and rules of 401(k) plans including the uses of life insurance in a 401(k) plan;

9:30am – 10:30am
Classroom Course – Managing Retirement Income

10:30am – 12:00pm
Correspondence/Self-Study Exam – Guide to Retirement Planning Strategies

*To receive CE credit you must take a correspondence self-study exam and receive a passing grade of 70% or higher

To register online, click on the link below
https://www.brokered.net/pensionmaxima/ny/
This program is provided with a copay of $50 to licensed CPAs.

You must register no later than 3:00pm (Eastern Time) on October 17th, 2018

Seating is Limited
Once registration is complete you will be redirected to download and review your study material.
Broker Educational Sales & Training, Inc. (ID 105731) is registered with the NASBA as a sponsor of continuing professional education. Participating state boards of accountancy have final authority on the acceptance of individual courses for CPE Credit.

Complaints regarding program sponsors may be addressed to the
National Registry of CPE Sponsors
150 Fourth Avenue North,
Suite 700
Nashville, TN 37219-2417

Broker Educational Sales & Training, Inc. is the approved Sponsor for the CE portion of this program. Sponsor# 105731
Questions pertaining to the CE portion of this program please call 800-345-5669
The Westchester Chapter of New York State Society of CPA’s

Presents the Eleventh Annual:

Career Opportunities in Accounting Recruitment Event
An informal gathering for firm, government and industry professionals, college students and professors

Is your firm in search of talented professionals for internships, part-time and/or full-time positions?
If your answer is yes, then this event is for you!

Thursday November 1, 2018
6:00PM — 8:00PM

Cambria Hotel- Downtown White Plains
250 Main Street
White Plains, 10601

Sponsor fee is $375 for each participating firm
Refreshments and appetizers served all evening

Past student and professor participation has come from more than 15 different college institutions, including (but not limited to):
Baruch College
Fordham University
Lehman College
Manhattan College
Iona College
Mercy College
Pace University

For reservations and further information, please contact:
Edward Wells at (914) 345-5888 ext. 110 or
via e-mail: EWells@pscpafirm.com
The Westchester Chapter of New York State Society of CPAs Presents its Eleventh Annual:

Career Opportunities in Accounting Event

An informal gathering for professionals, students, and professors to meet with representatives from a variety of accounting firms, government organizations (NYS Department of Taxation), and other private companies to discuss Internships, and both Part-Time & Full-Time Positions!

Refreshments and appetizers served all evening.

Sign up for a mock interview! Limited spaces available
Contact Surya Persaud to reserve your space: SPersaud@pscpafirm.com

Date: Thursday
November 1, 2018

Location: Cambria Suites Downtown
White Plains, NY
(Walking Distance from White Plains Train Station)

Time: 6:00PM - 8:00PM

No fee for students or professors, but advanced registration is required.

To register, please email: Spersaud@pscpafirm.com
ANNUAL WINE TASTING NETWORKING EVENT
TO BENEFIT:
BLYTHEDALE CHILDREN’S HOSPITAL

PLEASE JOIN THE WESTCHESTER CHAPTER’S YOUNG CPAS
AT THE BEAUTIFUL WILLOW RIDGE COUNTRY CLUB!
GUESTS CAN PURCHASE TICKETS TO
WIN VARIOUS RAFFLE ITEMS - ALL PROCEEDS TO
BENEFIT BLYTHEDALE CHILDREN’S HOSPITAL

WHEN: NOVEMBER 8, 2018 5:30-8:00 PM
WHERE: WILLOW RIDGE COUNTRY CLUB
123 NORTH STREET HARRISON NY 10528
PRICE: $55 MEMBER $65 NONMEMBER IN ADVANCE
$65/$70 AT DOOR
REGISTER NOW
OR SEND CHECKS PAYABLE TO: NYSSCPA WESTCHESTER
ATTN: HEATHER OBODA
CITRIN COOPERMAN & CO, LLP
709 WESTCHESTER AVE, SUITE 200
WHITE PLAINS, NY 10604

RAFFLE DONATIONS NEEDED! PLEASE CONTACT HEATHER OBODA AT:
HOBODA@CITRINCOOPERMAN.COM OR (914) 949 - 2990 X 3382
NYSSCPA Westchester Chapter
CPA Ethics Update

When: Tuesday, Nov. 27th, 6:00 p.m. - 8:00 p.m. (check-in at 5:30 p.m.)

Where: 800 Westchester Avenue
Rye Brook, NY 10573

CPE: 2 credits

Overview
A hallmark of the public accounting profession is its commitment to professional ethics and the public interest.

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

Cost: $35/$50 - Members/Non-Members

CLICK HERE TO REGISTER NOW!

For more info please call 800-537-3635
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!

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, (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, gbhorn@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 Schofer, Chair, (914) 644-9247, bhs@mgroupusa.com

** LOCAL PRACTITIONERS - Coordinate monthly programs.
Stephen Franciosa, Co-Chair, (718) 885-9191, sfanciaosa@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, rterranoo@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@mdcoopca.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@mdcoopca.com
# 2018-2019 Calendar

<table>
<thead>
<tr>
<th>Date</th>
<th>Program/Activity/Event</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/17/2018</td>
<td>Westchester Chapter Business &amp; Industry Conference</td>
<td>8:30 a.m. - 5:00 p.m.</td>
</tr>
<tr>
<td>10/24/2018</td>
<td>Continuing Education Workshop</td>
<td>8:30 a.m. - 12:00 p.m.</td>
</tr>
<tr>
<td>10/25/2018</td>
<td>Workplace Harassment Event</td>
<td>5:30 p.m. - 7:30 p.m.</td>
</tr>
<tr>
<td>10/31/2018</td>
<td>Allied Professionals CPE Breakfast Event</td>
<td>7:30 a.m. - 9:30 a.m.</td>
</tr>
<tr>
<td>11/01/2018</td>
<td>Annual Recruitment Night</td>
<td>6:00 p.m. - 8:00 p.m.</td>
</tr>
<tr>
<td>11/02/2018</td>
<td>Westchester/Rockland Tax Conference Part 1</td>
<td>8:30 a.m. - 5:00 p.m.</td>
</tr>
<tr>
<td>11/08/2018</td>
<td>NextGen Wine Tasting Event to benefit Blythedale Children’s Hospital</td>
<td>5:30 p.m. - 8:00 p.m.</td>
</tr>
<tr>
<td>11/27/2018</td>
<td>Westchester Chapter Ethics CPE Seminar</td>
<td>5:30 p.m. - 8:00 p.m.</td>
</tr>
<tr>
<td>12/17/2018</td>
<td>Westchester/Rockland Tax Conference Part 2</td>
<td>8:30 a.m. - 5:00 p.m.</td>
</tr>
<tr>
<td>01/23/2019</td>
<td>Westchester Chapter Managing Partner’s Breakfast</td>
<td>8:00 a.m. - 9:30 a.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) 997-7724</td>
<td><a href="mailto:Licia.Vizcarra@cmccensullocpa.com">Licia.Vizcarra@cmccensullocpa.com</a></td>
</tr>
<tr>
<td>Michael Herz</td>
<td>(203) 731-1577</td>
<td><a href="mailto:Michaelbherz@gmail.com">Michaelbherz@gmail.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 2018

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

- **10/18/18 @ 8:00 a.m.** - CITY LIMITS DINER (200 Central Ave, White Plains, NY 10606)

Future meetings:

- **11/15/18 @ 8 a.m.** - CONFERENCE CALL
- **12/20/18 @ 8 a.m.** - CONFERENCE CALL

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

**NEXT NEWSLETTER - NOVEMBER 2018**

*TRICK OR TREAT?*  
**HAPPY HALLOWEEN!**