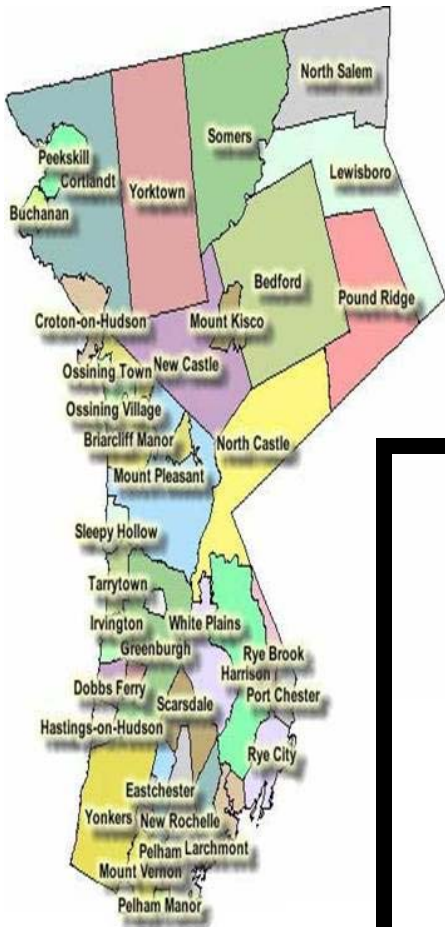




Westchester Chapter E-Newsletter

September 2016



NYSSCPA Westchester Chapter's Business and Industry Conference

October 14, 2016

8:00 a.m. – 4:10 p.m.

Location:

Skadden Arps Slate Meagher & Flom LLP
360 Hamilton Ave, White Plains, NY 10601

8 CPE - Course Code 28511736
1 Taxation, 1 Ethics, 6 Specialized Knowledge

Member/Nonmember Fee: \$149 member; \$335 nonmember

For a detailed Agenda and to Register
please [click here!](#)

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Bernadette Schopfer

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From New Chapter President Catherine Censullo...

Dear Fellow Westchester Chapter Members,

Summer is coming to an end and it is time for you to get ready for the fall. Hopefully, you have taken a break in your routine and had some time to relax over the summer months. Whether it is wrapping up the tax season, planning for the year ahead, or digging into some new projects, you are sure to face many new challenges in the coming year.

I would like to thank those of you who invested in their youth by sending your young employees to the FAE NextGen Conference in New York this past July. Our firms who participated by sending at least one of their Westchester employees were CB Authentix Business Services, Inc., Citrin Cooperman LLP, Keith Boyer Certified Public Accountant, LLC, Kevin Matz & Associates PLLC, Pellegrino Saccomani & Wells LLP, and PKF O'Connor Davies, LLP. Special congratulations to PKF O'Connor Davies, LLP for investing in four of your young employees. You will all reap the benefits of your investment in the years to come.

If you haven't yet had the opportunity to attend an event held by The Allied Professional Group of Westchester, here's your perfect opportunity: Please join us for our next event on Tuesday, Sept. 20, between 7:30-9:30 am, at the Doral Arrowwood in Rye Brook. This event is a follow-up session to our June 9 event, Helping Your Clients and Loved Ones Deal with Alzheimer's Disease.

Attorney Peter Strauss will return to give you more practical advice and answer questions from our roundtable groups on specific areas of concern on this topic. Perhaps you came to our last event and want to hear more. Or perhaps you have firsthand experience dealing with this issue with one of your loved ones and did not wish to see the Glen Campbell documentary, "I'll Be Me," because it brought home sad memories of your experiences.

You will also get an opportunity to meet your colleagues from the Westchester Chapter of the New York State Society of CPAs, the Westchester County Bar Association, and the Financial Planning Association of the Greater Hudson Valley. We network together, work together, learn together and share best practices with each other. I encourage you to become a part of this effort to strengthen your resources as a leader in your profession.



Continued on next page...

If sales tax is on your radar screen, you should join the Accountants in Industry event on Wednesday, Sept. 21, at 7:45 am at Skadden Arps Slate Meagher & Flom LLP in White Plains to hear Joseph Calamia II, CPA, and Jennifer Koo, Esq., Tax Attorney, help you learn the nuances and techniques of "Surviving Sales Tax" in New York State. Hone your skills so that you won't be caught off-guard.

If you are interested in gaining some board level experience with not for profit organizations, consider attending the Speed Dating event on October 24th to see if there is a match between the needs of the non-profit organizations and your interest in participating.

Get ready to gear up for your hiring for the upcoming year and join us at the Annual Recruitment Night on Oct. 26 at the Crowne Plaza Hotel in White Plains to get your pick of some of the top talent entering the profession.

And all of you--both young and not so young--are welcome to join us at the NextGen-hosted Wine Tasting Event on Nov. 3, at the Willow Ridge Country Club to benefit Blythedale Children's Hospital.

We will have many more events scheduled in the near future. So, please be sure to keep reading our newsletters so you don't miss any of our great upcoming events.

Please let me know if there are any other ways we can better serve you. My eyes and ears are open and eager to hear your suggestions.

Thank you for all that you do to make this a truly great chapter.

Best Regards,



Catherine Censullo can be reached at: 914-997-7724 or by email at: Catherine.Censullo@cmcensullocpa.com



ALLIED PROFESSIONAL GROUP OF WESTCHESTER

IT'S TIME TO REGISTER FOR OUR NEXT EVENT

TUESDAY, SEPTEMBER 20th, 2016

**7:30 am – 9:30 am: Networking Breakfast and Roundtable
Presentation**

**HELPING YOUR CLIENTS AND LOVED ONES DEAL WITH
ALZHEIMER'S DISEASE:**

**PRACTICAL SOLUTIONS TO CRITICAL ISSUES IN
DECLINING COGNITIVE CAPACITY**

1 CLE, CFP CE, AND CPE CREDIT

\$40 per person

DORAL ARROWWOOD, RYE BROOK NY

Dear Fellow Members and Friends of the Westchester County Bar Association, the Financial Planning Association of the Greater Hudson Valley and the Westchester Chapter of the New York State Society of CPAs:

Perhaps you joined us for the presentation and documentary on June 9th, and would like to hear more.

Or perhaps you thought it would be too painful to watch the Glen Campbell documentary because it reminded you of your painful experiences of dealing with Alzheimer's Disease or other cognitive diseases with your own loved ones, and decided not to come. But now you would like to gain some practical pointers for approaching these issues with your clients and loved ones in the future.

Peter J. Strauss of Drinker Biddle will be returning to discuss some issues and approaches that he did not have time to discuss at our last event. Not only is he a pioneer in this area, he has a wealth of experience and an uncanny way of taking a very pragmatic approach to a complex area. The audience was amazed at how he presented such practical advice that you would not easily find in other venues. [Click here](#) to see his bio.

Please join us for our networking breakfast, presentation from Peter Strauss, and roundtable question and answer session. There is no prerequisite for attending this event.

Learn more practical strategies and solutions to help you better deal with the eldercare issues surrounding Alzheimer's disease and other cognitive illnesses that touch us all. Find out about the ethical issues that need to be addressed. Gain a better understanding of the fiduciary responsibility and legal capacity issues surrounding this area. Better aid and assist your clients, prospects and loved ones as they face these issues with their own family members.

Demonstrate your leadership by networking with your colleagues to forge new relationships, strengthen the ones you have, and build new resources to better serve your clients.

SEATING IS LIMITED! PLEASE REGISTER BY: Monday, September 12th, 2016

TO REGISTER:

Contact your Association Person below.

Registration fee for members and non-members is \$40.00.

You will be provided registration confirmation required to attend the event.

Breakfast is included in the price.

FPA Greater Hudson Valley

Marcia Kaplan, CFP®

marcia.s.kaplan@ampf.com

914-289-0700 x11

1 CFP CE Credits - Program ID 230159

NYSSCPA

Amy Amodeo

rle@ecker-law.com

914-273-0777 (fax 914-273-1787)

1 CPE Credits - Course Code 29112703

To Register Online please [click here](#)

Westchester County Bar Association

Luis Rivera, Esq.

cle@wcbany.org

914-761-3707 x20

Certificates for 1 CLE credits will be provided to Attorney attendees

Date: Tuesday, September 20, 2016

Time: 7:30 a.m. to 9:30 a.m.

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

For directions to the Doral Arrowwood please [click here](#).

JOIN US AT THE ACCOUNTANTS IN INDUSTRY COMMITTEE WEDNESDAY SEPT. 21, 2016

Surviving Sales Tax

We welcome our speakers, Joseph Calamia II, CPA, Tax Manager and Jennifer Koo, Esq., Tax Attorney, both with Sales Tax Defense LLC, a boutique tax consulting firm that provides sales, use, transaction tax advice and assistance with state tax problems. There are many nuances that can affect the specific application of New York's sales and use taxes. This program discusses many of those nuances.

General Information

- I. Transaction Tax
 - Tangible personal property and some services
 - Point of delivery versus point of use
- II. Sales tax vs. Use tax – paid vs. self-assessed
- III. Requirements of doing business - Register, file, collect remit (fiduciary responsibility), separately state.
- IV. Tangible Personal Property - Personal vs. real property, software, utilities/telephone.
- V. Services - Repairs and labor, information services and computer services, printing, storage and parking, limousine services, protective and detective services, NYC personal services
- VI. Nontaxable items - Food, medicine, some clothing
- VII. Make It Nontaxable - Out of state, resale, manufacturing, R&D, capital improvements, exempt organizations, promotional material. NEVER FORGET YOUR EXEMPTION CERTIFICATES!

Sales Tax Audits

- I. First Contact - Audit notification letter and related package including waivers
- II. The Initial Appt. - Opening interview, reconciliations, audit method
- III. The Following Appt. - Test period records, EDP method, follow-up
- IV. Additional Follow-Up Appts. - Open items, resolving loose ends
- V. The 30-Day Letter (AU-346) - Agree/disagree
- VI. The Tax Appeal Process - How to disagree, protecting rights, RP assessment

Collection Resolutions

- I. Notice of Determination - Formal protest
- II. Notice & Demand for Payment - Legal bill
- III. Installment Payment Agreement - DTF-5 Forms, tax warrants, liens
- IV. Offer in Compromise - Form DTF-4.1, lump sum payoff
- V. Bankruptcy - Delays but does not resolve problem

Bulk Sale Notification

- I. Transferee Liability

**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.

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:

**Speed Dating For Not for Profits
at Arts Westchester**

When: Monday, October 24, 2016

Time: 5:00 p.m. - 7:00 p.m.

Location: 31 Mamaroneck Ave, White Plains, NY 10601

For more information see flyer on page 7!

TO REGISTER FOR THIS EVENT PLEASE FOLLOW THE LINK:

[https://events.r20.constantcontact.com/register/eventReg?
oeidk=a07ed69fq8tac49a6f5&oseq=&c=&ch=](https://events.r20.constantcontact.com/register/eventReg?oeidk=a07ed69fq8tac49a6f5&oseq=&c=&ch=)

PLEASE JOIN US AT THE:

Annual Recruitment Night

When: Wednesday, October 26, 2016

Where: Crowne Plaza in White Plains

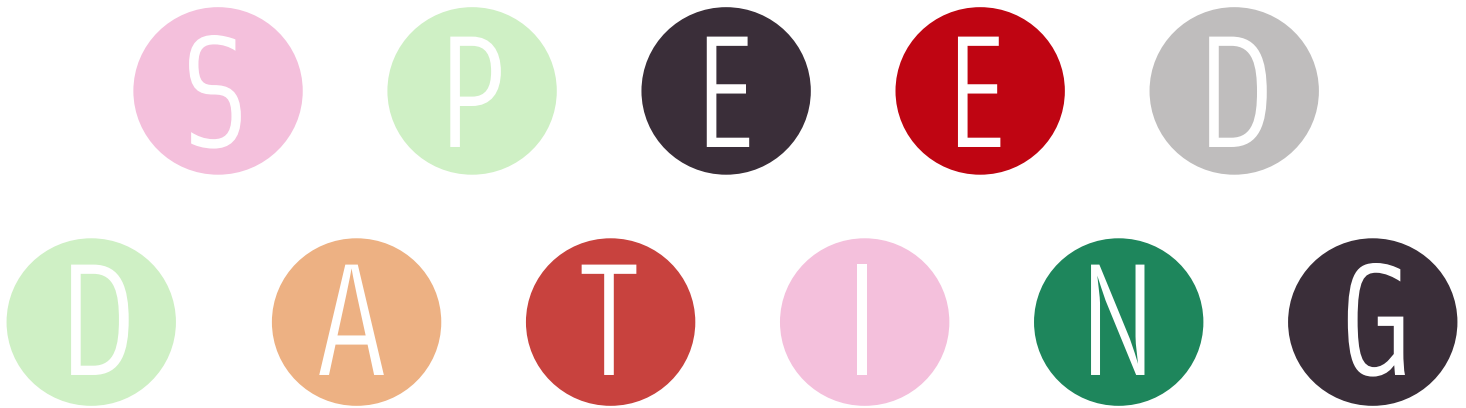
Time: 5:30 p.m. - 8:00 p.m.

Firms interested in attending please contact
Heather Oboda at: hoboda@citrincooperman.com

Students wishing to attend please contact Carey Romanowicz at:
CRomanowicz@markspaneth.com

Mock interviews will be offered. Anyone interested in
volunteering to perform mock interviews please e-mail
Edward Wells at: ewells@pscpafirm.com

NON PROFIT BOARD



FIND THE **RIGHT SEAT** AT THE **RIGHT TABLE**

There are hundreds of nonprofits in Westchester. Each and every one of these nonprofits requires board leadership to change and strengthen our communities. YOU can play a vital role.

Those with financial, media, legal, service and managerial business expertise are needed.
Help make an impact using the professional experience you already have.

Find out more about serving on a Board of Directors here in Westchester as Volunteer New York! and the Westchester Chapter of the NYSSCPA introduce you to local nonprofit representatives looking for candidates during our annual networking event.

REGISTER online at volunteernewyork.org/boardmatch

There is no fee for board candidates.

Join Us Monday, October 24, 2016

from 5-7pm

at ArtsWestchester

31 Mamaroneck Avenue, White Plains

For the Second Annual Nonprofit Board Speed Dating



Take a look at some of the **NONPROFITS** you'll get **MATCHED UP** with

NAMI of Westchester
The Picture House
Open Door Family Medical Center
Family Services of Westchester
Hope's Door

It Takes a Village 10591
Charles L. Briant Community Ctr.
Legal Services of the Hudson Valley
NSSA at Mt. Vernon
Jewish Child Care Association

Sharp Again Naturally
A -HOME
The New Dawn Foundation
Backyard Sports Cares
Volunteer New York!

MAKE A DIFFERENCE AND EXPAND YOUR **PROFESSIONAL EXPERIENCE**

Leadership Westchester is generously supported by



QUESTIONS? Contact Allison Chader

allison@volunteernewyork.org / 914-227-9307

SAVE THE DATES:
2016 ANNUAL TAX CONFERENCE

When: Friday, November 11th
&
Friday, December 2nd

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

Time: TBD

For more information please contact Doug Ruttenberg at:
druttenberg@pkfod.com



DON'T MISS THIS GREAT EVENT:
**NextGen Hosted Wine Tasting
to Benefit
Blythedale Children's Hospital**

When: Thursday, November 3rd

Where: Willow Ridge Country Club
123 North Street, Harrison, NY

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

Sponsors and raffle donations needed please contact Heather Oboda at:
hoboda@citrincooperman.com

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 (formerly CFO Committee)** - 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, drubin@lepatner.com
Michael Herz, Co-Chair, (914) 662-2525, michaelherz@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@mercv.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, Co-Chair (914) 674-7779, dstefano@mercv.edu

**** ESTATE AND FINANCIAL PLANNING** - One of the chapter's most active committees. Annual conference, quarterly presentations and monthly breakfast discussion groups.
Robert L. Ecker, Co-Chair (914) 273-0777, RLE@Ecker-Law.com
Howard Klein, Co-Chair (914) 949-2990, HKlein@citricooperman.com

**** GOLF OUTING** - Help organize the annual outing. Major networking opportunity!
Jeffrey A. Schwartz, Chair, (914) 286-6908, jeff@stantonandleone.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 E. Franciosa, Co-Chair, sfranciosa@cpa.com
Catherine Censullo, Co-Chair, 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@citricooperman.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 x 3382 hoboda@citricooperman.com
Denise Stefano, Co-Chair (914) 674-7779, dstefano@mercv.edu

**** SPONSORSHIPS** - Coordinate with institutions who might sponsor Chapter events.
Richard Terrano, Co-Chair, (212) 330-6085, rterrano@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, druttenberg@odpkf.com

**** YOUNG CPAs NextGen** - Coordinate different events and outings during the year for Young CPAs.
Matthew Katz, Co-Chair (914) 949-2990, mkatz@citricooperman.com
Edward Wells, Co-Chair: EWells@pscparfirm.com

2016-2017 CALENDAR

<u>Date</u>	<u>Program/Activity/Event</u>	<u>Time</u>
09/20/2016	Allied Professionals Networking Breakfast Event on Alzheimer	7:30 a.m. - 9:30 a.m.
09/21/2016	Accountants in Industry CPE Event - Surviving Sales Tax	7:45 a.m. - 9:00 a.m.
10/14/2016	Business and Industry Conference	8:00 a.m. - 4:10 p.m.
10/24/2016	Speed Dating for Not for Profits	5:00 p.m. - 7:00 p.m.
10/26/2016	Annual Recruitment Night	5:30 p.m. - 8:00 p.m.
11/03/2016	NextGen Wine Tasting Event to Benefit Blythedale Hospital	5:30 p.m. - 8:00 p.m.
11/11/2016	Annual Tax Conference Part 1	All Day Conference
12/02/2016	Annual Tax Conference Part 2	All Day Conference

<u>Newsletter Committee</u>	<u>Phone</u>	<u>E-Mail</u>
Licia Vizcarra	(914) 997-7724	Licia.Vizcarra@cmcensullocpa.com
Catherine Censullo	(914) 997-7724	Catherine.Censullo@cmcensullocpa.com

(E-mail submissions to the newsletter committee no later than the 10th day of the month prior to publication.)

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 () _____

Return this form to: Membership Dept., NYSSCPA, 14 Wall St, 19th Floor, New York, NY 10005

FUTURE BOARD MEETINGS 2016

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

09/22/16 @ 8:00 a.m.

Conference Call

NEXT NEWSLETTER - OCTOBER 2016

**HOPE YOU ALL ENJOYED LABOR DAY
WEEKEND NOW IT'S BACK TO SCHOOL!**

