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!

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Chapter Representative
Catherine M. Censullo
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 US AT THE
ACCOUNTANTS IN INDUSTRY COMMITTEE
OF THE NYSSCPA WESTCHESTER CHAPTER
WEDNESDAY SEPTEMBER 12, 2018

RETIREMENT PLAN DESIGN: How to Maximize the Business Owner’s Contributions and Minimize Staff Cost

We don’t expect snow in September, so we hope you will join us for this presentation originally scheduled for March 2018.

Our speakers, Andrew Roth and William Miller, are both with Danziger and Markhoff LLP. Please join us in an interactive and informative discussion on understanding the basics of designing retirement plans for your clients. This session will cover:

- Types of qualified retirement plans
- Contribution Limits:
- Limiting staff costs:
- Pros and cons of Roth 401(k)s
- Cash Balance Plans.
- Other defined benefit plans
- Split plan design

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 29112903.

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
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

SPONSORS TO BE ANNOUNCED SOON...STAY TUNED!

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

When: Nov. 27th, 6:00–8:00 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

Online Registration Coming Soon!

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 at gre@mdcocpa.com or call 203-327-7151 or John Brant at jbrant@pkfod.com
**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

**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, RE.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@emcensullocpa.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.
Michele Lazzara, Co-Chair, (914) 909-3421, mlazzara@markspaneth.com
Heather Oboda, Co-Chair, (914) 949-2990 x3382, hbohoda@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, rterranomarkspaneth.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@mdccopa.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, mkkatz@citrincooperman.com
Greg Re, Co-Chair, (203) 327-7151, Gre@mdccopa.com

We need your support and participation!!!
### Future Board Meetings 2018

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

- **9/27/18 @ 8:00 a.m. - CONFERENCE CALL**
  - Call In #: 605-475-4085 - Access Code: 353212#

**Next Newsletter - October 2018**

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**For All Newsletter Mailing Issues - Use This Form or Call (212)719-8333**

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<tr>
<th>Date</th>
<th>Program/Activity/Event</th>
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<tbody>
<tr>
<td>09/12/2018</td>
<td>Accountants in Industry CPE - Retirement Plan Design</td>
<td>7:45 a.m. - 9:00 a.m.</td>
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<tr>
<td>10/17/2018</td>
<td>Westchester Chapter Business &amp; Industry Conference</td>
<td>8:30 a.m. - 5:00 p.m.</td>
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<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>
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<tr>
<td>11/27/2018</td>
<td>Westchester Chapter Ethics CPE Seminar</td>
<td>5:30 p.m. - 8:00 p.m.</td>
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**Newsletter Committee**

- **Licia Vizcarra**          (914) 997-7724  Licia.Vizcarra@cmcensusulocpa.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.)

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**Hope You Enjoyed Your Summer!**