NYSSCPA Westchester Chapter’s 18th Annual Estate, Tax and Financial Planning Conference

June 11, 2018

Time: 9:00 a.m. - 5:00 p.m. 
(Registration/check-in at 8:30 a.m.)

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

8 CPE (Taxation) - Course Code: 28611933

Member/Non-Member Fee: $150/$175

See Flyer and Agenda for more details!

CLICK HERE TO REGISTER NOW!
NYSSCPA Westchester Chapter’s
18th Annual Estate, Tax and
Financial Planning Conference

When: June 11, 2018
9 a.m. – 5 p.m.
(Registration / check-in at 8:30 a.m.)

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

Topics and Speakers

Trust Planning Post TCJA: the CPAs’ Role
Martin M. Shenkman, CPA, MBA, PFS, AEP, JD, Peak Trust
Company; Jonathan G Blattmachr, Esq., Pioneer Wealth Partners,
LLC

Nearly Six Months Out: Thoughts on the Tax Cuts and Jobs Act
Blanche Lark Christerson, Esq., Deutsche Bank Wealth Management

Premium Financing: Rising Rates and Exit Strategies
Eric W. Lutz, Wells Fargo; Michael S. Tivnan, Wells Fargo

What Do We Really Know About New Section 199A?
Ronald Hegt, CPA, Citrin Cooperman

Topics in Trust Income Tax and Tri-State Estate Planning
Nathan Berti, Esq., Hodgson Russ LLC

Changing Your Residency Post TCJA
Joseph N. Endres, Esq., Hodgson Russ LLC

Register Online

Or Call 800-537-3635

Cost: $150 members; $175 nonmembers

Course Code: 28611933

CPE: 8 (taxation)

See program agenda

Westchester Chapter Estate Planning Committee Chairs & Conference co-Chairs:
Robert L. Ecker, Esq., CPA, LLM,
Howard P. Klein, CPA, MS
Westchester Chapter’s Eighteenth Annual
Estate, Tax and Financial Planning Conference
June 11, 2018

AGENDA

<table>
<thead>
<tr>
<th>Time</th>
<th>Speaker</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30am</td>
<td>Registration</td>
<td></td>
</tr>
<tr>
<td>8:50am</td>
<td>Introduction by Conference co-Chairs Robert L. Ecker, Esq., CPA, LLM and Howard P. Klein, CPA, MS</td>
<td></td>
</tr>
<tr>
<td>9:00am-11:00am</td>
<td>Martin M. Shenkman, CPA, MBA, PFS, AEP, JD and Martin M. Shenkman, P.C. and Jonathan G. Blattmachr, Esq. Director of Estate Planning, Peak Trust Company and Director, Pioneer Wealth Partners, LLC</td>
<td>Trust Planning Post TCJA: CPAs Role</td>
</tr>
<tr>
<td>11:10am-11:20am</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>11:20am-12:30pm</td>
<td>Blanche Lark Christerson, Esq. Managing Director Deutsche Bank Wealth Management</td>
<td>Nearly Six Months Out: Thoughts on the Tax Cuts and Jobs Act</td>
</tr>
<tr>
<td>12:30pm-1:30pm</td>
<td>Lunch</td>
<td>Premium Financing: Rising Rates and Exit Strategies</td>
</tr>
<tr>
<td>1:30pm-2:30pm</td>
<td>Ronald Hegt, CPA Citrin Cooperman</td>
<td>What Do We Really Know About New Section 199A?</td>
</tr>
<tr>
<td>2:30pm-3:40pm</td>
<td>Nathan Berti, Esq. Hodgson Russ LLC</td>
<td>Topics In Trust Income Tax and Tri-State Estate Planning</td>
</tr>
<tr>
<td>3:40pm-3:50pm</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>3:50pm-5:00pm</td>
<td>Joseph N. Endres, Esq. Hodgson Russ LLC</td>
<td>Changing Your Residency Post TCJA</td>
</tr>
<tr>
<td>5:00pm</td>
<td>Closing Remarks by Conference co-Chairs Robert L. Ecker, Esq., CPA, LLM and Howard P. Klein, CPA, MS</td>
<td></td>
</tr>
</tbody>
</table>
How to Keep Your Clients Out of Medical Bankruptcy

We welcome our speaker, Adria Gross, CEO of Medwise Insurance Advocacy. Please join us in an interactive and informative discussion. This session will cover:

- The 2-3 midnight rule for hospitalization & admittance
- NYS Surprise Bill Law
- Out-of-network and Out-of-state claims and denials
- NYS Appeals
- How to cut medical bills
- Pre-Authorizations
- Discounts on medications
- Q&A

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 29112808.

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.
The NYSSCPA Westchester Chapter hosts its:

Annual President’s Dinner/Reception

Honoring the Chapter’s 2017-2018 President,

Gina Goodenow

&

Welcoming the Chapter’s incoming 2018-2019 President,

Michael Herz

Date: Tuesday, May 29th, 2018
Location: Doral Arrowwood, 975 Anderson Hill Rd, Rye Brook, NY 10573
Time: 6:00 p.m. – 9:00 p.m.
(Cocktail Reception beginning at 6:00 p.m.)
Cost: $65 per person

Contact Licia Vizcarra for more information and/or to register at 914-997-7724
or by e-mail at Licia.Vizcarra@cmcensullocpa.com

CLICK HERE TO REGISTER/PAY ONLINE
JOIN US AT THE
ACCOUNTANTS IN INDUSTRY COMMITTEE
OF THE NYSSCPA WESTCHESTER CHAPTER
WEDNESDAY JUNE 6, 2018

UNDERSTANDING TODAY’S STOCK MARKET

We welcome our speaker, Keith Small, Regional Planning Specialist with Cetera Financial Specialists. Please join us in an interactive and informative discussion on understanding the basics of the stock market. This session will cover:

- Why Invest?
- How Do People Invest?
- What Have We Learned?
- Not Investing Means Taking Risks, Too.
- Pursuing a Better Investment Experience: 10 Best Practices
- 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 29112804.

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:

<table>
<thead>
<tr>
<th>Event Description</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<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>
</tr>
</tbody>
</table>

SPONSORSHIPS:

<table>
<thead>
<tr>
<th>Sponsorship Description</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIMITED GOLD SPONSORSHIP:</td>
<td>$1,900</td>
</tr>
<tr>
<td>Sign near tee box area that company sponsored the hole</td>
<td></td>
</tr>
<tr>
<td>Table at registration desk</td>
<td></td>
</tr>
<tr>
<td>Reserved tables at cocktail hour and dinner</td>
<td></td>
</tr>
<tr>
<td>Recognition at dinner</td>
<td></td>
</tr>
<tr>
<td>Lunch, golf, drinks and dinner for one</td>
<td></td>
</tr>
</tbody>
</table>

* 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
The Westchester Chapter Nominating Committee has proposed and accepted the following slate of Officers and Directors for the 2018-2019 Chapter year. All candidates have been nominated and elected to serve.

**Officers:**

- President: Michael Herz
- President-Elect: Heather Oboda
- Vice President: Gwendolyn Horn
- Treasurer: Matthew Katz
- Secretary: Edward Wells

**Board Members to fill vacancies:**

- 2018-2020: Jeffrey Schwartz
- 2018-2020: Greg Re
- 2018-2020: Robert Winton
- 2018-2020: Deborah Rubin
- 2018-2020: Tameka Walters

**Board Members continuing 2-year terms:**

- 2017-2019: Richard Terrano
- 2017-2019: Kelly Blacker
- 2017-2019: John Brant

Pursuant to the by-laws, current Chapter President, Gina Goodenow, will serve on the Board as Immediate Past President.
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 2017-2018

The Westchester Chapter has organized the following committees for the 2017-2018 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.
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 - Coordinate monthly programs.
Stephen Franciosa, Co-Chair, (718) 885-9191, sfranciosa@iona.edu
Catherine Censullo, Co-Chair, (914) 997-7724, Catherine.Censullo@cmecsullocpa.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, 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, rtterrano@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 roundtable discussion/meetings.
Doug Ruttenberg, Chair, (914) 381-8900, druttenberg@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@mdco CPA.com
### 2017-2018 Calendar

<table>
<thead>
<tr>
<th>Date</th>
<th>Program/Activity/Event</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/16/2018</td>
<td>Accountants in Industry CPE - How to Keep Your Clients Out of Medical Bankruptcy</td>
<td>7:45 a.m. - 9:00 a.m.</td>
</tr>
<tr>
<td>05/29/2018</td>
<td>Westchester Chapter President’s Dinner Reception</td>
<td>6:00 p.m. - 9:00 p.m.</td>
</tr>
<tr>
<td>06/06/2018</td>
<td>Accountants in Industry CPE - Understanding Today’s Stock Market</td>
<td>7:45 a.m. - 9:00 a.m.</td>
</tr>
<tr>
<td>06/11/2018</td>
<td>Westchester Chapter 18th Annual Estate, Tax &amp; Financial Planning Conference</td>
<td>9:00 a.m. - 5:00 p.m.</td>
</tr>
<tr>
<td>06/19/2018</td>
<td>Organizational Meeting/Dinner</td>
<td>5:30 p.m. - 8:30 p.m.</td>
</tr>
<tr>
<td>08/13/2018</td>
<td>Annual Golf Outing</td>
<td>All Day Event</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@cmcensullocpa.com">Licia.Vizcarra@cmcensullocpa.com</a></td>
</tr>
<tr>
<td>Gina Goodenow</td>
<td>(212) 251-4042</td>
<td><a href="mailto:GinaGoodenow@gmail.com">GinaGoodenow@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)

- **5/29/18 @ 5:00 p.m.** - Doral Arrowwood, 975 Anderson Hill Rd, Rye Brook  
  (Prior to the President’s Dinner Reception)

- **6/19/18 @ 5:30 p.m.** - Organizational Meeting/Dinner, Ruth’s Chris Steakhouse, 670 White Plains Rd, Tarrytown

**Next Newsletter - June 2018**

---

**Mother’s Day**

---

**HAPPY SPRING TIME!**

---

Images ©Encore Software, Inc., and its licensors. All rights reserved. Images may not be saved or downloaded and are only to be used for viewing purposes.