

NASSAU/SUFFOLK CHAPTER NEWSLETTER

Volume 18, Issue 2 FEBRUARY 2018

**Date
Topic**

Wednesday, Feb 21, 2018
MAP Technology Tune-Up for the Modern Office

**Learning
Objective**

Learn how to evaluate the role of modern technologies in your practice for cost savings and increased productivity.

Speakers

Jason Palmer, CPA of Palmer Computer Services, inc.

Moderators

Brian Gordon, CPA of State Tax Audit Representation Inc., Richard Punturo, CPA of Bernstein & Punturo LLP

Credits

MAP Meeting

Location

On Parade Diner - 7980 Jericho Turnpike, Woodbury, NY 11797

**Time
Member
Non-Member
Walk-in**

Registration: 7:45 AM | Program: 8:00 - 10:00 AM
On or before Friday, Feb. 16 - \$30.00; After Friday, Feb. 16 - \$40.00
On or before Friday, Feb. 16 - \$40.00; After Friday, Feb. 16 - \$50.00
\$50.00

**Date
Topic**

Thursday, March 1, 2018
Tax Season Roundtable

**Learning
Objective**

It is your opportunity to have your tax questions related to the preparation of 2017 tax returns answered.

Please submit your questions in advance or stump the panel!
Recent guidance, announcements and cases will also be discussed if time allows.

Email questions by February 26th to: carol@markmancpa.com

Speakers

Robert Barnett, CPA, Esq., and Carol Markman, CPA

Credits

2 CPE/TAX

Location

The Mansion at Oyster Bay - 1 South Woods Road, Woodbury NY 11797

**Time
Member
Non-Member**

Registration/Networking/Dinner: 5:30 PM-6:30 PM | Program: 6:30 PM - 8:30 PM
On or before Friday, February 23rd - \$65; After Friday, Feb. 23rd - \$80
On or before Friday, February 23rd - \$80; After Friday, Feb. 23rd - \$90

Sponsors:

Intercontinental Capital Group
Lighthouse Financial

To register for any of our
meetings, please visit

go.nccpap.org

STATE OF THE N/S CHAPTER



The outpouring of enthusiasm from our board members, committee chairpeople, volunteers and members has resulted in a successful first quarter. I attended the 3-day National board meeting held in Florida in January. At the beginning of my chapter report I announced that I had a page and a half of items to report on. The group said “of course you do” and I proceeded to give a 45 minute presentation listing our accomplishments from the beginning of our fiscal year and offering to share resources with the other chapters.

Our chapter had new focus on several fronts; information is being disseminated via several social media sites and through the goNCCPAP app.

We are reinstating our chapter newsletter (print and digital) under the direction of our chairman Bob Goldfarb and editor Gary Sanders

Our Young Professionals Impact Community is up and running with over 100 members

We have re-energized our college outreach under the direction of Samuel Azus, Jerry Casola and Richard Punturo.

You can see that the success of our chapter is the result of all of our hard work and dedication on many fronts:

Installation Dinner

Our N/S Chapter & Ed Foundation Installation Dinner was held on November 1st. Karen Giunta & Paula Sheppard recreated Rockaway Beach with the beautiful centerpieces they created & donated. Ross Kass added to the mood with the photography montage he created and presented. While our favorite master of ceremonies Peter Cicione told jokes and kept the festivities moving. Etta Gelbien and Kathy Casey created the journal with our design team Mainly Marketing - they sold advertisements in the journal & sponsors for table wine, cocktail hour and the Viennese Table. There were approximately 130 people in attendance.

Long Island Tax Professionals Symposium

The 15th annual Long Island Tax Professionals Symposium was extremely successful. Held the third week in November the feedback from our sponsors, speakers and attendees was unanimous. Our attendees felt they received good value for the admission fee; they were very happy with the sessions and impressed with our speakers. Our Internal Revenue Service partners were able to help close many cases and give advise for continued follow up where there was no quick resolution. The New York State group had such a great experience working with our members that they have opened new avenues of communication and are looking forward to returning next year. Our sponsors were grateful for the opportunity to speak with so many of our attendees and provide information on products and improvements. A big THANK YOU to Bob Goldfarb the symposium chairman who is a big supporter of our Young Professional outreach effort. He made it possible for Richard Finelli, Anthony Tramontano and Andrea Parness our committee chairpeople to schedule a lunch and an impact group session at the symposium. We also invited some of the other chapter presidents who were on site to attend. I believe we gained some great insight and now have over 100 members in the Young Professionals Community. We distributed a new tax book which shipped out directly to the attendees and was received mid December – this is the 2017 tax year guide. The 2 page insert for the book highlights the benefits of chapter and Education Foundation membership, the donations made through the Linda Fund and lists the social media links. We already see an uptick in the activity on the sites and feel we are getting a better response to our upcoming meetings because of these posts. Thank you to the executive committee of the symposium, our volunteers and speakers, the chairman Bob Goldfarb, and our IRS liaison Linda Henson.

STATE OF THE N/S CHAPTER

Continued

December/January MAP and Chapter Meetings

Our meetings were very informative and well attended considering we had stiff competition from holiday parties and school plays. Our members were able to take notes which are included on our social media sites, our TAKEAWAYS. Thank you to our MAP Co-Chairmen Richard Punturo and Brian Gordon, to our speakers Glenn Franklin, esq, ADP speakers Kristin LaRosa esq and Lauren Alexander, and Stuart Lang, CPA.

December Young Professional Focus Group Meeting

Our first Young Professionals Focus Group session was held on December 14, we had good attendance considering the time of year (holiday parties) and the group will be continuing to meet and to give us feedback on how we can help them grow. Again thanks to the support of several of our members: Bob Goldfarb, Richard Finelli, Mark Roseman, Robert Brown, Ken Hauptman & Andrea Parness who all act as mentors to the group. The group chairmen are Anthony Tramontano, James Hall, Anthony Lawrence, Matt Taus, and Steven Musmanno.

January-February 3 day Tax Intensive

N\S Chapter & Ed Foundation have created & presented a 3-day intensive Tax Cuts & Jobs Act seminar series. We lined up some great speakers and panels and designed the program as an intermediate course to delve deeply into the issues created by the law. We also beta tested a live stream and video taping of these sessions to create an information library.

Newsletter

Newsletter Chairman Bob Goldfarb and editor Gary Sanders put this newsletter to “bed” in digital format. Articles were submitted by our members and chapter sponsors. We will accept submissions from other chapter members & their presidents- I am happy to talk off line with those of you who are interested.

Tax Issues

Now that we have tax issues co-chairs, our intent is to collect information from our members and submit this to the National Tax chairs – we have submitted 1 issue so far, but based upon the new tax law we will probably have to revise that one & will be submitting more.

College Outreach

Our College Outreach committee will be contacting local colleges to create an opportunity for college students to work with our members as summer interns. They will also be looking to create a mechanism for college graduates to apply for jobs in member firms. Related to this outreach, Andrea Parness has joined the Virtual Enterprises International NYC advisory council. This country-wide organization works with High School students and teachers across the country who then compete in a business plan competition (think Tom Cruise in Risky Business). She has connected them with INTUIT who is looking to bring QuickBooks training to high school students. The long- term plan is to enable trained students to enter the workforce while still in school.

Member Benefits

Our member benefits committee headed by Stanley Tepper has made arrangements for us to purchase a subscription to business books abstracts through their publisher “The Business Source” at a 30% discount. All in all I feel we are following our vision & growth plan so our first 90 days have been very productive and have created some great excitement for our chapter & our entire organization.

Andrea Parness, CPA



***RECORD BREAKING ATTENDANCE AT OUR THREE-PART SEMINAR
REGARDING THE TAX CUTS AND JOBS ACT!***

EDUCATIONAL FOUNDATION PRESIDENT'S MESSAGE



Once again, another year passes, another piece of tax legislation comes. I have often thought they should write the Internal Revenue Code in pencil.

This one may be profoundly different than the others, as while our clients won't be filing on a postcard yet, some may no longer need our services to prepare their income tax returns. Some might think this is a bad thing. I prefer to think of it as an opportunity, as too many view tax preparation as a commodity, rather than a service, and that often means price comes first.

As CPAs, we are held to a high standard, and we hold ourselves to a high standard. The knowledge and resources we possess bring value. With less time spent on lower level services, we have more time to spend on services which bring both value, and perceived value.

One of the greatest tools we have is each other. A deep resource pool that every member of our organization is a part of.

While I did say that the simple tax return is going the way of the dinosaur, they did throw us a present in the new IRC section 199A. The planning will be easy for some clients. For others it will involve complex planning, which creates both revenue opportunities and risks, which cannot be ignored.

With that in mind, I hope you enjoyed our three part program on the Tax Cuts and Jobs Act with our great speakers and lively discussion amongst our members.

Robert Brown, CPA, CGMA

PAST PRESIDENT'S MESSAGE



Hopefully you have all had wonderful holidays and time spent with family and friends. As we recover from our deep freeze, we know that this will be a challenging tax season with massive tax changes and a plethora calls from clients with questions.

It has been my pleasure to serve the members of ncCPAp for the past four years first as President of the Nassau/Suffolk Chapter and then President of the Educational Foundation.

During these years I have made great friendships and learned firsthand the dedication of our staff and volunteers to our members. They work tirelessly to bring us great educational programs, including our Tax Symposium, keeping us up to date on the latest tax and accounting updates and representing our and our clients' interests by meeting with members of Congress and the IRS in Washington, the NYS Department of Taxation and the AICPA.

Please consider becoming active in your Chapter. ncCPAp is the voice of the sole or small practitioners. It is vital to our members and your practice, that new volunteers join us and add new voices and ideas for the growth of the Chapter. By doing that you benefit yourself and your fellow practitioners.

In closing, a special thanks to Robert Goldfarb, Ross Kass and the entire Symposium Committee, Robert Brown, Larry Bloom, Leilani Elias and now Richard Punturo and Brian Gordon, former and current co-chairs of our MAP committee. And thanks to our staff, Etta Gelbein, Kathleen Casey, and Patti Kass for their dedication to the Chapter.

Michael Rubinstein, CPA

PEER REVIEW AND THE SMALL FIRM



In October the Governor of New York signed a law requiring all accounting firms that provide attest services to undergo a peer review. There is no longer the exemption for firms with two or fewer CPAs. This means that all firms in New York State that do attest services will have to have a peer review.

This new law is now a requirement of the New York State Education Department (NYSED). This is a requirement for you to keep your CPA license in good standing. The attest services is considered when an accounting firm prepares any Audit, Review or agreed upon procedures and/or attestation engagements. An agreed-upon procedure is when a client hires an external party to perform an audit on a specific test or business process.

An accounting firm that only does compilations or preparation services is still not required to do a peer review under NYSED standards.

To get into the system, firms need to do two things. Firms must notify the NYSED that they are required to have a peer review. You can notify them by e-mail at cpabd@nysed.gov or by mail at New York State Education Department, Office of the Professions, State Board for Public Accounting, 89 Washington Avenue, Albany, NY 12234-1000.

Firms will also need to enroll in a peer review program. You should go to the AICPA PRIMA site. You do not need to be a member of the AICPA to enroll. The site to enroll at is <https://www.aicpa.org/interestareas/peerreview/PRIMA.html>

Your peer review is needed to be completed within 18 months of enrollment with the NYSED.

Frank A. Gallo, CPA

MESSAGE FROM THE EDITOR



I have had the honor of serving as President of both the Nassau Suffolk Chapter and Educational Foundation, and probably most other positions in our organization over the last ten years.

The logical choice as Past President, is to return to my first position in our Chapter; Editor of our Newsletter!

We expect this to be the first in a series of informative and helpful Newsletters.

Our goal is to keep you informed of the latest tax laws, and also to inform you of our events, meetings, and news of our members and our organization.

Most importantly, we are an extended family sharing our experiences and friendship together. This forum is dedicated to our members both as Professionals, and as members of the NCCPAP family.

We were very fortunate this past month to “enjoy” a three-part series on all aspects of the new Tax Cuts and Jobs Act. The explanation and multitude of examples discussed in roundtable format was one of the most extensive offered in the entire Metropolitan area. We all owe a tremendous vote of thanks to Robert Goldfarb, Robert Barnett, and Neil Katz for the time and energy spent to ensure the success of these programs.

I must add on a personal note; These types of programs with attendance of over 250 members are one of the most rewarding points that we share.

Also, I would like to thank all of our Officers for their participation, and in particular Robert Goldfarb, and Carol Markman as our Newsletter advisors.

We all appreciate the energetic leadership of our Chapter President Andrea Parness, and the steady, constant work of our current President of our Educational Foundation President Robert Brown.

The success of this Newsletter, and our organization, is based on your submission of items that you deem relevant, so email me at gsanders@srcpapllc.com.

We hope you enjoy our newsletter, and come to know our goal is always **“Members helping Members”**

Have a great Tax Season!

Gary Sanders, CPA

NYS TAX SEASON UPDATE

Driver's license requirement to e-file 2017 New York State tax returns

Data from driver's licenses or state identification information is required for 2017 in order to e-file but:

- If the taxpayer REFUSES to provide the information, the tax preparer should mark the check box "No Applicable ID", indicating that the taxpayer has neither a driver's license nor a state issue ID. The tax preparer needs to keep contemporaneous notes regarding the good faith effort to collect the information from the client, if the Tax Department were to ask.
- For joint returns, the information from the driver's license is required for BOTH spouses.
- The tax preparer must capture the driver's license ID number, issuing state, issuing date and expiration date for all licenses or ID cards and enter into the software. If the taxpayer has a NY driver's license or non-driver ID, ONLY THE FIRST THREE CHARACTERS of the document number needs to be entered.
- If the taxpayer does not have a driver's license or state issued ID or if the taxpayer is DECEASED, the tax preparer is to mark the checkbox "No Applicable ID", indicating that they do not have a license or ID.
- This is the link to the NYS bulletin "Tax Year 2017 NYS Driver License Requirements ..." - <https://content.govdelivery.com/accounts/NYTAX/bulletins/1cdf60b>.

Submitted by:

Carol Markman, CPA
EP Caine & Associates
<http://cainecpa.com/>
NCCPAP National Past President
Nassau/Suffolk Past President

APPS THAT CAN HELP YOU GET THROUGH TAX SEASON

PRACTICE MANAGEMENT

Original publication: Intuit proconnect January 4, 2018 / Stephanie Friswell

With another tax season on the horizon, we talked to several of our tax professionals and Intuit® ProConnect™ Tax Council members about what apps and software they love the most. Many of these apps save them time each day, while others help them make the most of their free time so they can truly focus while at work. We hope these favorite apps help make tax season a little easier for you!

Jackie Meyer, CPA, CTC, is president and founder of Meyer Tax Consulting, LLC, in Southlake, Texas. Her team works with executives on strategic tax planning, while also consulting on industry best practices as a speaker and thought leader. She has several apps to recommend:



- **Jetpack Workflow** has simplified workflow management for our firm. Their podcasts have the most amazing interviews, too!
- **AppToTo** knows who you are meeting with based on the cell phone number (or any customer parameter you set) in your Google Calendar; it will then send a text message and/or email reminder about upcoming appointments. AppToTo It automates a sometimes very dreadful process of tracking down people.
- **theSkimm**'s slogan is "making it easier to be smarter." I have to admit, I've felt pretty dumb after tax season, due to not keeping up with world events like everyone else. I now use my iPhone speak feature to read me the daily email summary while driving.

<https://www.meyertax.com/> - cpa@meyertax.com

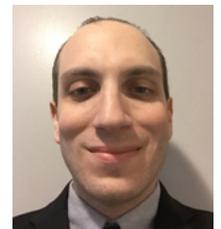
Andrea M. Parness, CPA, is the owner of A. Parness Company, a CPA firm based in Belle Harbor, Queens, N.Y. She and her team work remotely year-round with clients. Here are several of her recommendations:



- **Hubdoc** fetches bank statements and bills so we don't have to ask our clients over and over again.
- **TSheets** helps our clients with payroll time sheets and allocations for job costing.
- **Waze** helps me drive anywhere, whether I'm heading to a client meeting or home from work. It gives me insights on traffic and police stakeouts for us speeders.

<http://aparnesscpa.com/> - Andrea@aparnesscpa.com

Mark Stewart, CPA, is a partner at Feldstein & Stewart, LLP in New York. Here is his app recommendation:



- **Carbonite** is a wonderful service, and the mobile app is fantastic! In and of itself, Carbonite is offsite backup. It works smart; while your information continuously backs up, if something is deleted from your system, Carbonite does not delete it from the cloud backup for several weeks. This is important and smart since every tax season someone on our staff accidentally deletes or messes up a file. This absolutely saves us time ... and also the embarrassment of having to tell a client we lost a file!

<http://feldsteinandstewart.com/> - mstewart@feldsteinandstewart.com

Are we missing one of your favorite apps? Leave us a note in the comments section below and let us know what apps and software get you through tax season!

<https://taxprocenter.proconnect.intuit.com/practice-management/apps-that-can-help-you-get-through-tax-season/>

PENSION NOTES FROM STEPHEN ABRAMSON, CPC

Have your clients remitted their employees' 401(k) deferrals on time? The DOL says there is no safe harbor for a plan with more than 100 participants but the funds must be remitted and separated from the employer's assets as soon as "administratively possible." That is a facts and circumstances determination. If it can be done in two days that is the ongoing requirement barring any unforeseen circumstances. For a plan with less than 100 participants there is a safe harbor of seven business days. If the plan has not satisfied this requirement the correction can be made through the IRS Voluntary Compliance program which essentially results in making the employee whole, i.e. adjust the late deposit for gains but not losses. If you need assistance feel free to contact our office.

Has your client started or purchased another business? Has his/her spouse started or purchased another business? How about one of their children? If so be sure to consider controlled group rules that may require inclusion of the new business' employees in your client's existing retirement plan. The rules are detailed, extensive and address a variety of potential circumstances in which both entities would be considered one for non discrimination and eligibility purposes. An oversight in this area could be financially devastating. Call our office to analyze any potential transactions in advance of making the change.

Stephen Abramson, CPC
APS Pension & Financial Services Inc.
steve@apspension.com

WHAT IS PORTABILITY AND DO I STILL CARE

As a result of the Tax Cuts and Jobs Act, filing an estate tax return to elect portability has greater benefit as the federal estate tax exemption is increased from \$5,600,000 to \$11,200,000 for 2018 (and adjusted for inflation thereafter). This in effect doubles the unused federal estate tax exemption portable to a surviving spouse and may provide enormous estate tax savings. This provision is set to expire in 2025 which is all the more reason estate tax returns to elect portability be filed timely.

The first of a married couple to pass away may transfer their unused federal estate tax exemption to the surviving spouse on a timely filed Form 706 Estate Tax Return (known as the deceased spousal unused exclusion "DSUE"). Unaware of this benefit, executors and administrators of estates forwent filing an estate tax return where the decedent's estate was below the filing requirement threshold. The IRS in Rev Proc 2017-34 effective June 9, 2017 provides relief for these estates (and future estates) by extending the tax return due date and granting penalty relief for the late filing of estate tax returns seeking to file to secure the portability election that were otherwise not required to file an estate tax return. Practitioners should consider taking advantage of the revenue procedure where a client has the potential to incur estate or gift taxes.

- The due date is the later of January 1, 2018 or two years from the date of death.
- Retroactively applies to estates of decedents passing away after 12/31/2010.
- Prepare the 706 under the same rules applicable to estates required to file, with the box remaining checked for portability.
- It should be noted on the face of the return that it is being filed pursuant to Rev Proc 2017-34.
- If the surviving spouse has since passed away, you can file for the first spouse to elect portability and amend the filed return of the (then) surviving spouse to claim a refund (if estate tax paid on death of second spouse).
- Consider the limitations of surviving spouses who remarried as only the DSUE of their most recent deceased spouse is portable.

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A THANK YOU FROM THE LINDA FUND!



To All of Our Supporters:

Thank you so very much for your support, both financially and emotionally, of the LINDA FUND. Your contribution is so greatly appreciated. While you did not win the tickets to the Broadway show Hamilton (Henry DeJesus won the tickets), you were part of an amazing fundraising event that raised over \$8,000 to the FUND. Due to your generous contribution, the LINDA FUND was able to donate \$10,000 to the following 501(c)3 charities last month:

- HorseAbility
- Ronald McDonald House
- Leukemia & Lymphoma Society
- Hospice Care Network
- Interfaith Nutrition Network
- JCC Hospice Center

Again, on behalf of the LINDA FUND and its advisors, thank you all very much and we wish you a happy and healthy 2018!

All the best,
Bob

Bob Goldfarb
Co-Founder, LINDA FUND



THE LINDA FUND
THE LITPS NCCPAP DEVELOPMENT APPEAL FUND
A Charitable Organization Benefiting Long Island Charities
in Memory of John S. Giunta and Linda L. Goldfarb



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 Website: go.nccpap.org

MEETING SCHEDULE 2018

Chapter Meetings
 The Mansion at Oyster Bay
 1 South Woods Road, Woodbury, NY 11797
 (In the Town of Oyster Bay Golf Course)

MAP Meetings
 On Parade Diner
 7980 Jericho Turnpike
 Woodbury, NY 11797

LITPS
 Crest Hollow Country Club
 8325 Jericho Turnpike
 Woodbury NY 11797

*Chapter Meetings/Presentations: Registration/Dinner/Networking is at 5:30 PM
 4 CPE/A&A and 4 CPE/ETHICS Registration/Breakfast/Networking is at 7:45 AM
 MAP Registration/Breakfast/Networking is at 7:45 AM

Day	Date	Time	Topic	CPE	Location
Th	Jan 11*	4:00-8:30 PM	Tax Cuts and Jobs Act Part 1	4 CPE/TAX	The Mansion
W	Jan 24	7:45 AM-10:00 AM	Tricks and Tips QuickBooks - Desktop and QB Discussion Group (bring your laptop)	2 CPE/MAP	On Parade
Th	Jan 25	4:00-8:30 PM	Tax Cuts and Jobs Act Part 2	4 CPE/TAX	The Mansion
Th	Feb 1*	4:00-8:30 PM	Tax Cuts and Jobs Act Part 3	4 CPE/TAX	The Mansion
W	Feb 21	7:45 AM-10:00 AM	Technology Tune-Up for the Modern Office	2 CPE/MAP	On Parade
Th	Mar 1*	5:30-8:30 PM	2018 Tax Season Roundtable	2 CPE/TAX	The Mansion
W	April 25	7:45 AM-10:00 AM	2018 Post Season Tax Roundtable	2 CPE/MAP	On Parade
Th	May 3*	5:30-8:30 PM	Client Buy – Sell Agreement & Shareholder Agreements (Panel)	2 CPE/TAX	The Mansion
Th	May 24	7:45 AM-12:00 NOON	Accounting and Auditing Series Part 1	4 CPE/A&A	The Mansion
W	May 30	7:45 AM-10:00 AM	Office Organization & Time Management	2 CPE/MAP	On Parade
Th	June 7*	5:30-8:30 PM	Elder Care, Disability & Medicare/Medicaid	2 CPE/TAX	The Mansion
Th	June 14	7:45 AM-12:00 NOON	Accounting and Auditing Series Part 2	4 CPE/A&A	The Mansion
Th	June 21	7:45 AM-12:00 NOON	Ethics	4 CPE/A&A	The Mansion
W	June 27	7:45 AM-10:00 AM	Adding Value – Billing Issues	2 CPE/MAP	On Parade
Th	July 12*	5:30-8:30 PM	Dissecting KIs for Hedge Funds or PTP	2 CPE/TAX	The Mansion
Th	July 18	7:45 AM-12:00 NOON	Accounting and Auditing Series Part 3	4 CPE/A&A	The Mansion
W	July 25	7:45 AM-10:00 AM	Social Media Connection – How to Market Your Practice	2 CPE/MAP	On Parade
Th	Aug 2*	5:30-8:30 PM	Foreign Tax Issues	2 CPE/TAX	The Mansion
W	Aug 22	7:45 AM-10:00 AM	TBD MAP Meeting	2 CPE/MAP	On Parade
Th	Sept 6*	5:30-8:30 PM	TBD Chapter Meeting	2 CPE/TAX	The Mansion
W	Sept 26	7:45 AM-10:00 AM	TBD MAP Meeting	2 CPE/MAP	On Parade
Th	Oct 4*	5:30-8:30 PM	TBD Chapter Meeting	2 CPE/TAX	The Mansion
W	Oct 31	7:45 AM-10:00 AM	TBD MAP Meeting	2 CPE/MAP	On Parade
	Nov 14, 15 & 16		Long Island Tax Professionals Symposium		Crest Hollow Country Club
W	Nov 28	7:45 AM-10:00 AM	TBD MAP Meeting	2 CPE/MAP	On Parade
Th	Dec 6*	5:30-8:30 PM	TBD Chapter Meeting	2 CPE/TAX	The Mansion
W	Dec 19	7:45 AM-10:00 AM	TBD MAP Meeting	2 CPE/MAP	On Parade

Calendar is subject to change

**For Sponsorships
 please contact Kathy Casey at
lits@litaxsymposium.org**

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Bernard Rader, CPA	1982-83
Samuel Baum, CPA*	1981-82
Edwin J. Kliegman, CPA *	1979-81

*deceased



GOOD & WELFARE

Congratulations to:

Barry Zalk, CPA on the Birth of a new grandson,

Condolences to:

Ruth Sattig Betz, CPA on the loss of her father, Alan R. Brown.
 Scott Sanders, CPA on the loss of his father, Charles Sanders.

Our Good & Welfare Chairman is Stephen Sternlieb, CPA steve@ssternliebcpa.com



Educational Foundation of the
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POLICY

THE FEES FOR MEMBER REGISTRATIONS ARE:

CHAPTER MEETING (2 CPE): \$65.00 WITH *PRE-REGISTRATION AND \$80.00 REGULAR REGISTRATION, AND/OR AT THE DOOR REGISTRATION.
MAP MEETING: \$30.00 WITH *PRE-REGISTRATION AND \$40.00 REGULAR REGISTRATION, AND AT THE DOOR \$50.00 REGISTRATION.

THE FEES FOR NON-MEMBER REGISTRATIONS ARE:

CHAPTER MEETING (2 CPE): \$80.00 WITH *PRE-REGISTRATION AND \$90.00 REGULAR REGISTRATION, AND/OR AT THE DOOR REGISTRATION.
MAP MEETING: \$40.00 WITH *PRE-REGISTRATION AND \$50.00 REGULAR REGISTRATION, AND AT THE DOOR \$50.00 REGISTRATION.

SEMINARS AND OTHER PROGRAMS: TBD

*PRE-REGISTRATION MEANS: A COMPLETED REGISTRATION FORM WITH PAYMENT AND POSTMARKED, FAXED OR E-MAILED TO THE N/S CHAPTER OFFICE THE FRIDAY PROCEEDING (Unless otherwise noted) THE CHAPTER MEETING, MAP MEETING AND/OR SEMINAR THAT YOU ARE PLANNING TO ATTEND.

CANCELLATION AND REFUND POLICY

A PRE-PAID REGISTRANT WHO CANNOT ATTEND THE CHAPTER MEETING, MAP MEETING AND/OR SEMINAR WILL BE ISSUED A CREDIT FOR THE NEXT MEETING IF CANCELLATION NOTICE IS GIVEN TO N/S

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