



The National Conference of CPA Practitioners

Nassau/Suffolk Chapter Volume 9, Issue 4 June 2012

Date Topic

Speakers

Credits

Location

Time

Cost Members

Non-Members

Thursday, June 7, 2012 - Chapter Meeting ELDERCARE/REVERSE MORTGAGE

Stuart Schoenfeld, Esq. and Robert Barnett, Esq.
of Capell Barnett Matalon & Schoenfeld LLP
Henry Montag CFP, CLTC of Financial Forums Inc
Anna Markowitz Recht, of AM Recht & Associates, Inc.
Michael Vernon of Genworth Financial Home Equity Access, Inc
3 CPE/TAX

Holiday Inn, Plainview

Networking/Registration: 5:30 PM, Program: 6:00 - 9:00 PM

On or before Friday, June 1 - \$50.00, After Friday, June 1 - \$60.00

On or before Friday, June 1 - \$75.00, After Friday, June 1 - \$85.00



Saturday, June 16, 2012

The Ellen Gordon CPAs 4(a) Cause 5K Run/Walk to End Hunger 9:00 AM Wantagh Park, Wantagh, NY

See Page 4 for details and come down and support your friends!

Date Topic

Moderator

Speaker

Credits

Location

Time

Cost

Tuesday, June 19, 2012 - MAP Meeting IDENTITY THEFT & SECURITY -

WHAT YOU NEED TO KNOW TO PROTECT YOUR BUSINESS

Sandra G. Johnson, CPA, EA, CFE of Sandra G. Johnson CPA
Armando D'Accordo, President of CMIT Solutions of South Nassau
2 CPE/MAP/ADVISORY SERVICES

Ducks Stadium, Bethpage Ballpark, 3 Courthouse Drive, Central Islip

Registration: 7:45 AM, Program: 8:00 - 10:00 AM

On or before Friday, June 15 - \$20.00, After Friday, June 15 - \$30.00



Date Topic

Speakers

Credits

Location

Time

Cost Members

Non-Members

Thursday, June 21, 2012 - All Day ACCOUNTING & AUDITING UPDATE

Henry J. Krostich, CPA, CITP of the Fuoco Group LLP

Frank Gallo, CPA of Gallo & Company

Stuart G. Lang, CPA of Stuart G. Lang, CPA

8 CPE/A&A Credits

Holiday Inn, Plainview

Breakfast & Registration 8: 15 AM Program: 8:30 AM-5:00 PM

Program includes: Continental Breakfast, Buffet Lunch, Coffee Breaks and Materials

On or before Friday, June 15 - \$245.00

After Friday, June 15 - \$270.00 At the Door - \$295.00

On or before Friday, June 15 - \$300.00

After Friday, June 15 - \$325.00 At the Door - \$350.00

Date Topic

Moderators

Credits

Location

Time

Cost

Wednesday, June 27, 2012 - MAP Meeting EXPANDING YOUR PRACTICE -

HOW TO ADD ADDITIONAL SERVICES AND GET PAID FOR THEM

Sandra G. Johnson, CPA, EA, CFE of Sandra G. Johnson CPA

Douglas Sinetar, CPA of Douglas Sinetar CPA PC

2 CPE/MAP/ADVISORY SERVICES

On Parade Diner, Woodbury

Registration: 7:45 AM, Program: 8:00 - 10:00 AM

On or before Friday, June 22 - \$25.00, After Friday, June 22 - \$35.00

**To register for any of our
meetings, please visit**

<http://www.ns-nccpap.org>



NCCPAP MEMBERSHIP APPLICATION

National Conference of CPA Practitioners
Established 1979



Name of Firm _____

Contact Person _____

Address _____

No. & Street

Town

State

Zip

Phone () Fax () Email _____

Name of Sole Practitioner, Partners or Shareholder(s):

1. _____ CPA License Number: _____ State _____

Email Address _____

2. _____ CPA License Number: _____ State _____

Email Address _____

(Attach additional sheet if necessary)

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☐ Check enclosed for \$_____ Payable to NCCPAP

☐ Please bill my credit card for \$_____ Credit Card ☐ Visa ☐ Mastercard ☐ Amex

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Name on Credit Card _____ Signature _____ Date _____

Billing Address _____

No. & Street

Town

State

Zip

☐ Join and remit online at www.nccpap.org

DUES SCHEDULE

☐ CPA Firm _____ \$_____

(do not include clerical staff)

☐ 1 (Including Sole Practitioners) _____ \$260.00

☐ 2-3 _____ \$310.00

☐ 4-10 _____ \$480.00

☐ 11+ _____ \$800.00

☐ CPA from Non-Member Firm _____ \$260.00

☐ CPA Employee (Non-Owner) _____ \$195.00

☐ Retired CPA _____ \$130.00

Referred by: _____



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LOCAL CHAPTERS

- Nassau/Suffolk, NY
- Long Island East, NY
- New York City, NY
- Westchester/Rockland, NY
- Northern New Jersey
- Delaware Valley Chapter
- Boston, Massachusetts
- South Florida

PRESIDENT'S MESSAGE



We have all become accustomed to obtaining almost any form of information with several computer clicks... We have become accustomed to communicating via emails and text messages using every electronic device ranging from iPads, iPhones, and all sorts of notebook computers. It is fair to state that Google can furnish the entire Internal Revenue Code in seconds on your latest device.

Often we forget that even with the most sophisticated technology and equipment, that having the personal meetings and the “live conversations” can instantly provide and enhance our relationships with clients, and frankly all the people in our lives. I just attended a marketing meeting, in which the example of having lunch with a contact..no discussion of business.. “Just lunch” turned into a relationship between a banker and a CPA providing valuable referrals.

NCCPAP is about relationships and having those personal meetings and discussing in conversations and networking environments common problems, solutions and issues that every CPA practitioner faces. Sometimes simply knowing that we all have the same issue is enough to help us, and other times your problem can be addressed by talking with another practitioner.

As you will note elsewhere in this newsletter, we constantly have MAP meetings, Chapter meetings, special presentations that deal with every possible issue, dozens of chances to build those relationships.

The month of June is a great example of the relationships fostered in our chapter. We have arranged for a MAP meeting to discuss methods and marketing to add additional services to your practice. This is a critical and emerging area of growth and compliance.

Sometimes part of our relationships is being together in community involvement, as we are in partnering with the NYS Society - Nassau Chapter on June 16th for the annual The Ellen Gordon CPAs 4(a) Cause 5K Run/Walk to End Hunger for the benefit of Island Harvest. It is our way of remembering Ellen and at the same time gathering together to raise money together for the Long Island Food Bank. **Be sure to send in your registration as soon as possible, which can be found in a full page in this newsletter, so we can join forces together!**

As we have done so many times in the past, we united as a chapter with the other chapters and the National leaders of NCCPAP recently in Washington D.C. to express concerns and relevant issues that our members expressed to us. Sandy Zinman, President of Westchester/Rockland and our National Tax Chair expertly arranged for us to meet as various delegations with the Senate congressional aides and council, and IRS. **Be sure to review Sandy Johnson's article within, which summarizes this year's endeavor and our prior year accomplishments.**

We have a Chapter meeting with a distinguished panel to review every single aspect of how to advise our clients and our own family and friends on issues involving elder care, including the legal, geriatric planning, Medicaid planning, and advocacy of supporting the elder generation.

We conclude the month with our annual all day Accounting and Audit seminar, with an array of topics...and of course those critical CPE credits that must now be obtained! **Be sure to register for this, and all of our seminars at our website found on the cover.**

As you can see, whether it is seminars, community service, or being part of the legislative process, NCCPAP relies not on the age of computers, we won't simply sit at our desks as an inactive part of society. We will remain to the tenets of our organization... **“MEMBER HELPING MEMBER”**. We also remain as an active organization in our community.

All I ask is that you pass along our membership application on page 2... and request just one (maybe two) colleague(s) to join NCCPAP, so we can continue to build our membership, and frankly the funds we need to proceed.

Gary Sanders, CPA

Holiday Inn @ Plainview
215 Sunnyside Blvd
Plainview, NY 11803

MEETING SCHEDULE 2012

On Parade Diner
7980 Jericho Turnpike
Woodbury, NY 11797

June 7, 2012*	Eldercare and Related Topics	3 CPE/Tax	Holiday Inn
June 16, 2012	The Ellen Gordon CPAs (4) A Cause 5K Run/Walk to End Hunger	Wantagh Park	Wantagh NY
Tuesday, June 19, 2012	Identity Theft & Security – What you need to know to protect your business 2 CPE/MAP/ADVISORY SERVICES Ducks Stadium, Bethpage Ballpark, 3 Courthouse Drive, Central Islip		
June 21, 2012	Accounting & Auditing Update	8 CPE/A&A	Holiday Inn
June 27, 2012	Expanding Your Practice – How to Add Additional Services and Get Paid for Them 2 CPE/MAP/ADVISORY SERVICES		On Parade Diner
July 12, 2012*	NYS Tax Update	2 CPE/Tax	Holiday Inn
July 25, 2012	Let's Get Personal! - Stress Management, Time Management and How to Stay Sane 2 CPE/MAP/ADVISORY SERVICES		On Parade Diner
August 9, 2012*	Retirement Plans Designed for Closely Held Businesses	2 CPE/Tax	Holiday Inn
August 16, 2012	Ethics Update	4 CPE/Ethics	Holiday Inn
September 6, 2012*	Preparation for Peer Review	2 CPE/A&A	Holiday Inn
October 4, 2012*	Evening of Real Estate - Structuring - Tax and A&A and 754 Elections	3 CPE/Tax	Holiday Inn
November 14, 15 & 16	2012 Long Island Tax Professionals Symposium		Crest Hollow Country Club
December 6, 2012*	Employment Laws Update	2 CPE/Tax	Holiday Inn

* Chapter Meeting

All Meetings Subject to Change

PAST PRESIDENTS

Bruce Berkowitz, CPA	2009-11	Leon D. Alpern, CPA *	1992-93
Donald Ingram, CPA, CISA	2007-09	Harold Ogulnick, CPA	1991-92
Barry Zalk, CPA	2005-07	Laurie Greenberg, CPA	1990-91
Andrew L. Hult, CPA	2003-05	Steven Greenberg, CPA	1989-90
Anthony Finazzo, CPA, CFP, CVA *	2002-03	Robert Berkal, CPA	1988-89
Michael Winnick, CPA	2001-02	Irwin Rosenblatt, CPA *	1987-88
Karen P. Giunta, CPA	2000-01	Carole Roble, CPA	1986-87
Stuart G. Lang, CPA	1999-00	Raymond Jablons, CPA *	1985-86
Jerald I. Wank, CPA	1998-99	Herbert Schoenfeld, CPA	1984-85
Jack Weisbrod, CPA *	1997-98	Peter Ciccone, CPA	1983-84
Arthur Libman, CPA	1996-97	Bernard Rader, CPA	1982-83
Rhona Liptzin, CPA, PFS, CFP	1995-96	Samuel Baum, CPA*	1981-82
Alan I. Brooks, CPA	1994-95	Edwin J. Kliegman, CPA	1979-81
Carol C. Markman, CPA	1993-94		*deceased

GOOD & WELFARE

Our congratulations to

Alfonso and Barbara Mollica on their son Michael's 1st Communion

David Rothfeld, CPA on the Graduation of his daughter Debra Nern, from Stony Brook University School of Social Welfare

Long Island East President, Chuck Pegler, CPA on the Bar Mitzvah of his Grandson

Rona Lipson, CPA on the birth of her Grandson

Our Good & Welfare Chairman is Stephen Sternlieb ssternliebcpa@attg.net

NCCCPAP- NATIONAL - WASHINGTON DC

On May 9th, 10th and 11th NCCPAP held its quarterly National conference in Washington, DC. The highlight of the conference was the trip on Thursday to Capitol Hill. The participants broke up into teams of 3 – 4 CPAs and spent the day meeting with representatives of the Senate, Congress and IRS to present various tax issues we would like to see changed.

Among the issues discussed were the AMT, deductibility of long term care insurance premiums, tax return due dates and same-sex marriage tax returns. NCCPAP has a long, proud history of effecting change in Washington.

Over the past 30 years, NCCPAP has enjoyed many successes working with the IRS, Federal, State and Local Governments and other officials in a professional, positive manner. Some of our accomplishments are:

- Led the defeat of an AICPA sponsored “Global XYZ” cognitor designation which would have included both CPAs and Non-CPAs
- Established continuing liaisons with the IRS and State taxing authorities
- Testified before Congress on matters affecting CPA practitioners and their clients
- Eliminated anti-local CPA firm discrimination in bank loan agreements
- Supported court action that stopped a big – firm ad campaign denigrating local CPA practitioners
- Organized lawsuit funding that forced the AICPA to institute democratic ballot procedures
- Obtained greater opportunities for CPAs in tax court representation
- Collaborated with Internal Revenue Service to establish Personal Tax Identification Number numbers on Tax returns
- Established the NCCPAP Tax Symposium which provides CPE credits on all aspects of CPA practices
- Provided readily available assistance, through nationwide camaraderie, when a practitioner has a technical tax or business problem or requires practice administrative guidance

If you would like to become more active in the organization, contact the NCCPAP office at (516) 997-9500 or join us at our next chapter meeting on Thursday, June 7th at 5:30 pm at the Holiday Inn in Plainview, NY.

11th Annual

The
Ellen Gordon**CPAs 4(a): Cause**
5K Run/Walk to End Hunger

Music

Post-race
food &
refreshments

Trophies:

Top 3 Overall Male
Top 3 Overall Female
Top 3 Finishers in
each age category
(10 year groups)Ribbons for all
children under
14

Prizes

Area restaurant
and other Gift
Certificates.

Register online:

www.Active.com
www.glicr.org/events
www.islandharvest.org**11th Annual 5K RUN/WALK**
Saturday, June 16, 2012
9:00 AM Wantagh Park,
Wantagh, NYRegistration starts at 8:00 AM
Race Time: 9:00 AM

Proceeds will benefit:



www.islandharvest.org

Race timed by: Island Timing, LLC

Name _____ Sex M F
 Age on Race Day _____ Birth Date _____
 Email _____ Phone _____
 Address _____
 City _____ State _____ Zip Code _____

I know that running a road race is a potentially hazardous activity. I should not enter and run unless I am medically able and properly trained. I agree to abide by any decision of a race official relative to my ability to safely complete the run. I assume all risks associated with running in this event including, but not limited to: falls, contact with other participants, the effects of the weather, including high heat and/or humidity, dehydration, traffic, and the conditions of the road, all such risks being known and appreciated by me. Having read this waiver and knowing these facts and in consideration of your accepting my entry, I, for myself and anyone entitled to act on my behalf, waive and release the New York State Society of Certified Public Accountants, Island Harvest, the County of Nassau and all sponsors, Race Directors, their agents and volunteers, their representatives and successors from all claims of liabilities of any kind arising out of my participation in this event. I grant permission to all of the foregoing to use any photographs, motion pictures, recordings, and any other record of this event for any legitimate purpose. I acknowledge that entry fees are non-refundable for any reason and that my right to participate in this event (or a rescheduled event if this event is cancelled) is non-transferable. Roller Blades, Baby Joggers, Headphones, Animals are prohibited from participating in this race.

Applicant Signature Parent or Legal Guardian's if applicant is under 18

Date

☐ Enclosed is my registration fee of \$20 payable to Island Harvest☐ Enclosed is my additional tax deductible donation of \$_____ payable to Island Harvest**ADVANCE REGISTRATION \$20 BY JUNE 10, 2012, DAY OF RACE REGISTRATION FEE \$25**

Mail sponsor forms & checks to : Raymond W. Floch , CPA, G.R. Reid Associates, LLP, 18 Main Street, Huntington, NY 11743 (or bring to the Registration Table at the Race) Questions? Ray Floch (631) 425-1800x312 or e-mail: RFloch@GRRCPAS.com Or Roy B. Massa (631) 897-7182 or e-mail: roymassa@yahoo.com

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MESSAGE FROM THE EDUCATION CHAIRMAN

May Day was indeed a day that will go down in history for chapter presentations here at the Nassau/Suffolk Chapter of NCCPAP. If anyone ever questioned the relevance and timeliness of our chapter meetings, I can think of no better rebuttal than the following:

We hosted a three hour extended discussion of various topics presented by the local Criminal Investigation Division of the Internal Revenue Service. The discussion began with an analysis of construction fraud schemes in the construction industry, both private and public. Special Agent Alan M. Katz, Assistant United States Attorney Karen R. Hennigan, and Special Agent in Charge for the United States Department of Transportation, Douglas Shoemaker presented a hands-on discussion of construction fraud, how it is perpetrated and methods that the auditor may use to uncover it. Real-life examples were presented which provided a unique insight into the auditor's role and risks. The discussion also included use of check cashers and the underground cash economy both in construction and other businesses.

Thomas E. Bishop, Assistant Special Agent in Charge-Criminal Investigation Division of the Internal Revenue Service then presented a discussion regarding tax compliance and foreign account reporting. Mr. Bishop has been dividing his time between the Long Island Office and as Liaison in Washington D.C., and he has now informed us that he will be full-time back on Long Island.

The evening presented a terrific opportunity to meet these Special Agents that we never want to meet again in our professional practices (except at educational seminars). The discussions were lively and the questions and answers were insightful and important to our everyday practices. This was truly an opportunity to interface with agents at the leading edge of criminal investigations and gain an understanding of their approaches and viewpoints.

Our next chapter meeting will be held on June 7th and will focus on elder care and elder advocacy issues. Planning with reverse mortgages, elder care, a Medicaid update, other and various elder advocacy issues will be discussed as well the utilization of supplemental needs trusts. I look forward to seeing you all there. Now that tax season is over, attendance is mandatory.

Robert S. Barnett, CPA, Esq

CHAPTER MEMBER BENEFITS AND DISCOUNTS

Receive a 30% discount on CCH Products. The members are billed directly.

To order, go to: <http://tax.cchgroup.com/members/ns-nccpap> The CCH Code is Y3820.

Our contact is Roger Franks, Account Manager, Quantity Publications (East), (877) 300-5219 phone and fax.

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Contact the office for info (516) 997-9500



MAP – MANAGEMENT OF AN ACCOUNTING PRACTICE



Tax season is over. It's time to settle back in and concentrate on other issues surrounding the management of an accounting practice. The May MAP meeting focused on employment issues for a CPA firm. Guest Speaker and HR expert Christine Ippolito discussed various regulations regarding hiring and firing employees. Other topics discussed were locating talent, alternative staffing and flex schedules.

MAP committee meetings are always open and interactive. Bring your questions, concerns and ideas to your next meeting on Wednesday, June 27th at 8:00 am at the On Parade Diner in Woodbury where we will discuss Adding Additional Services to your Practice to Increase Revenue. Be sure to register early as our meetings have been filling up quickly and you don't want to be shut out of this one.

Are you interested in getting more involved in the MAP committee? We are always looking for volunteers to help. Do you have a question related to managing your accounting practice? Help is just a phone call away. Contact MAP co-chairs Sandy Johnson at 516-409-1120 or Doug Sinetar at 516-794-9696.

Sandra Johnson CPA & Douglas Sinetar, CPA

A MESSAGE FROM OUR EXECUTIVE VICE PRESIDENT

Spring is in full bloom, the first tax season is over, the next tax seasons (sales, payroll and extensions, extensions, extensions) will be here in short order, it's time to get some fresh air and take a walk (or run) in the park.

The annual "Ellen Gordon CPAs 4(a): Cause 5k run/walk" will take place on June 16th at 9:00 AM in Wantagh Park. The proceeds benefit Island Harvest helping many of our neighbors here on Long Island. This Charity event has been sponsored in the past by the Nassau Chapter of the New York State Society of CPA's. This year the Nassau/Suffolk Chapter of NCCPAP is proud to be a co-sponsor.

The race was named for Ellen Gordon, the late wife of long time nCCPAP member, David Gordon. There is music, refreshments and prizes. It's only \$20 if you register prior to June 10th or \$25 if you register the day of the event. (Think of late registration at a MAP meeting).

Let's show our support for a good cause, see each other away from the chapter meetings and the symposium and have some fun in the process.

Please use the attached form to register now, and pass along to friends and family, as this wonderful event is open to the entire community.

Michael Rubinstein, CPA

Disclaimer

IRS Circular 230 Legend: Any advice contained herein was not intended or written to be used, and cannot be used, for the purpose of avoiding U.S. federal, state, or local tax penalties. Unless otherwise specifically indicated above, you should assume that any statement in this newsletter relating to any U. S. federal, state, or local tax matter was written in connection with the promotion or marketing by other parties of the transaction(s) or matter(s) addressed in this newsletter. Each taxpayer should seek advice based on the taxpayer's particular circumstances from an independent tax advisor. Any opinion is solely that of the author and is not necessarily the opinion of NCCPAP.

POLICY

THE FEES FOR REGISTRATIONS ARE:

CHAPTER MEETING (2 CPE): \$50.00 WITH *PRE-REGISTRATION AND \$60.00 REGULAR REGISTRATION, AND/OR AT THE DOOR REGISTRATION.
MAP MEETING: \$25.00 WITH *PRE-REGISTRATION AND \$35.00 REGULAR REGISTRATION, AND/OR AT THE DOOR 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 REFUND IF CANCELLATION NOTICE IS GIVEN TO N/S NCCPAP CHAPTER OFFICE BY THE END OF THE CHAPTER MEETING, MAP MEETING AND/OR SEMINAR DAY.

POA WARS

In order to represent a company before the New York State Department of Taxation and Finance, a representative must submit a signed Power of Attorney ("POA") form. The Power of Attorney form must be signed by an authorized officer or member of the company. Furthermore, unless the representative is a Certified Public Accountant or attorney licensed in New York State, the officer or member signing the Power of Attorney form must have his signature notarized.

There are many reasons to submit a Power of Attorney form. Our firm does it to represent a company on audit or assist in resolving a tax problem. An accountant may submit one to discuss a company's filings with the Tax Department. However, when a Power of Attorney form is submitted to New York State, it (generally) overrides all previous Power of Attorney forms unless the option to retain prior representatives is selected. In our experience, submitting multiple POAs leads to the state inadvertently cancelling the POA the client wants retained. This forces the intended representative to submit another POA.

This leads to what we call POA wars.

Undergoing an audit is stressful. It may lead to one partner blaming another for any monies found to be due, especially in sales tax audits where sales tax is often a personal liability. Each partner may have their own representative, and each representative may submit a POA for the business. When one POA overrides the other, it leads to representatives continually submitting new POAs, fighting to be the one that remains on the Tax Department's system. Furthermore, New York State is not permitted to disclose who is a company's Power of Attorney, therefore one representative does not even know who the other is.

In our experience, rather than partners blaming and fighting each other, the end result is better when partners work together to minimize any audit exposure. If an amount is found to be due under audit, we always encourage partners to work it out amicably between them rather than accrue additional professional fees fighting with each other. Furthermore, our firm is always willing to work with other representatives because we find that bouncing around ideas can only result in a better strategy.

Sales Tax less Ugly...?

The New York State Department of Taxation and Finance has withdrawn TSB-M-12(5)S, which stated that Botox treatments and other cosmetic procedures were subject to sales tax.

Article Submitted by: Jessica Cettina, Tax Specialist at Sales Tax Defense LLC. She can be reached at 631-491-1500 ex. 12 or cedender@SalesTaxDefense.com



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Representing N/S NCCPAP
at the National Meeting of NCCPAP in Washington DC

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National Conference of CPA Practitioners

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June 20th for the July Issue.**

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