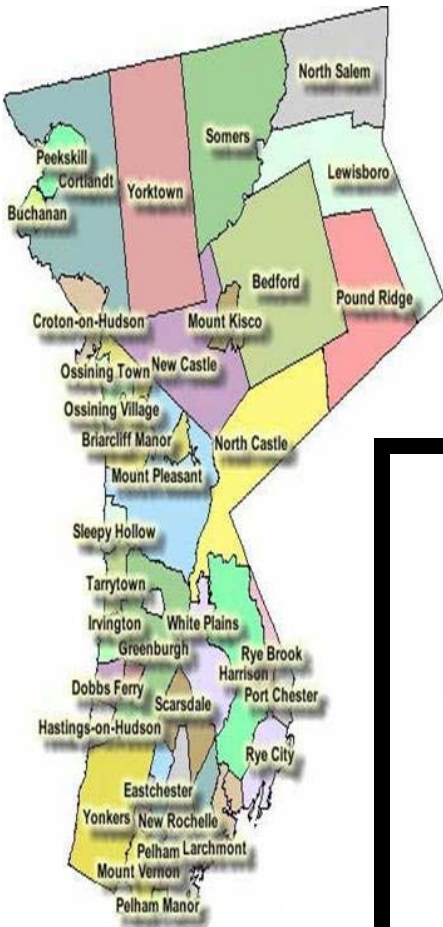




# Westchester Chapter E-Newsletter

## June 2016



### NYSSCPA Westchester Chapter's 16th Annual Estate, Tax and Financial Planning Conference

**June 10, 2016**

**8:50 a.m.–5:00 p.m.**

**Registration/check-in at 8:30 a.m.**

**At the**

**Doral Arrowwood**

**975 Anderson Hill Road, Rye Brook NY 10573**

**8 CPE - Course Code 28611733**

**Member/Nonmember Fee: \$140 member; \$165 nonmember**

**See attached Agenda on Page 5 for more details!**

To Register [click here!](#)

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Catherine M. Censullo

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**Chapter Representative**

Bernadette Schopfer

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*From New Chapter President Catherine Censullo...*

Dear Fellow Westchester Chapter Members,

I consider it both an honor and a privilege to serve you in my new role as President of the Westchester Chapter of the New York State Society of CPAs. Thank you to our Past President, Michele Lazzara for a job well done, and to our Board of Directors, for leading so many successful events this past year.

You are fortunate to have such an active Chapter, with a wonderful Board of Directors, committee chairs, members, and support staff, who give so much of their time and effort to make your Chapter as successful as it is.

Congratulations to the 2016 George Mendel scholarship winners and their parents: Lauren Friedman of Briarcliff Manor High School, Yanitza Rodriguez of Lincoln High School, Tiffany Poloco of Ursuline High School, Erica Carlin of North Salem High School, Jeremy Klein of Blindbrook High School, and Domenique Capone of Eastchester High School.

My first goal as President is to concentrate on the youth of our profession – you are our future. I would like to ask your help in expanding the outreach to our high schools and colleges, offering more internship and mentoring opportunities, and providing more training and leadership opportunities to our young developing CPAs and CPA candidates.

I challenge each Westchester managing partner to send at least one of your young professionals to this year's FAE "Next Gen: The Conference for Young CPAs" being offered in nearby Manhattan on July 25<sup>th</sup>, 2016, and will recognize those firms who participate in this wonderful opportunity for their future leaders of tomorrow.

I also encourage you to think about internship and mentoring opportunities in your firms.

My second goal is to stress the importance of teamwork with your fellow professionals, both as a way of developing alliances with your colleagues and providing additional resources for your clients. I encourage you to expand your circles of influence amongst the other professionals who are part of your clients' teams and potential resources for your clients to draw upon.

The Allied Professional Group of Westchester, consisting of 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, have been holding about three events per year for the past three years to 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 this profession.

Our next event is one not to miss on the evening of June 9<sup>th</sup> at the Doral Arrowwood in Rye Brook. What a great opportunity for you to demonstrate your leadership by rubbing elbows with your colleagues and building your circles of influence, while gaining insightful knowledge about Alzheimer's disease and dementia, an area that touches you through your clients, their families, and your own families in some way. You will even earn 3 CPE credits in the process.

Another networking opportunity to share with your colleagues, your clients, and your circles of influence is our Annual Golf Outing event at Willow Ridge Country Club on Monday June 13<sup>th</sup>. Don't miss this opportunity to strengthen your alliances in a comfortable setting.



**Continued on next page...**

My third goal is to encourage the members of our organization to focus on succession planning so that our clients will still be served after you are no longer able to serve them.

Our Chapter's population has an increasing number of older CPAs who need to look beyond the point where they will be able to serve their clients themselves.

This point was brought home to me over three years ago when a key employee of my firm, who had been working with me for over three years and who was under age 50, came down with the flu in February 2013. Thinking that after a week or so, she would be back with me, the devastating news came that her flu turned into viral meningitis and encephalitis. She lost 15 years of her short-term memory and, although the doctors said she would fully recover after six months, that never happened.

She was never able to return to work, drive a car, or support herself. It was a blow to my firm and took a long time to recover. Trying to replace the skill of a worker who had a Mensa IQ, knew the clients, and could easily handle the most complicated of situations was not easy. Dealing with this type of situation showed me the importance of succession planning. I want to help the members of your organization to be prepared for their next steps.

I hope to provide some training opportunities to help those of you who have not yet thought through your succession plans to help you be more prepared for this effort and to work through and develop your plan.

My fourth goal is to have more outreach to the community and find more ways to help the community, whether it be additional education to the community or more ways of giving back and donating to charitable causes in the community.

On that note, I invite you to save the date on November 3, 2016, when the Young CPAs/Next Gen Group of Westchester will be hosting a wine-tasting (and maybe even beer-tasting) event to benefit Blythedale Hospital. The event is open to everyone, even if you do not happen to be a Young CPA, and will benefit a great organization.

I am also thinking of replacing our October networking event with a late November/early December holiday party/networking event where we can include an element to give back to the community with some sort of charitable donation.

Please know that your suggestions and ideas are welcome. I also invite the managing partners to meet with me on an individual basis to better understand your needs and concerns and how the organization can better serve you. I look forward to a great year ahead and look forward to your continued guidance and support.

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](mailto:Catherine.Censullo@cmcensullocpa.com)



**JOIN THE  
ALLIED PROFESSIONAL GROUP OF WESTCHESTER  
FOR  
A NETWORKING NIGHT AT THE MOVIES  
Thursday, June 9th, 2016  
5:30 pm – 6:45 pm: Networking, Food, and Drinks  
7:00 pm – 9:30 pm: Live Presentation and Movie  
HELPING YOUR CLIENTS AND LOVED ONES DEAL WITH ALZHEIMER'S DISEASE  
3 CFP CE, 3 CPE CREDITS and 3 CLE Certificates  
Doral Arrowwood, Rye Brook, NY  
REGISTRATION FEE: \$75 (Members & Non-Members)**

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:

We invite you, your spouse or significant other, and your friends to join us for a spectacular networking and educational event on a topic that is near and dear to us all: Helping Your Clients and Loved Ones Deal with Alzheimer's Disease.

We have a special evening planned at the Doral Arrowwood in Rye Brook on June 9th, 2016 that you won't want to miss!

Our networking session begins the evening from 5:30 pm to 6:45 pm where you will be able to mix and mingle with your colleagues and friends, make new connections, establish new resources, and develop new opportunities to forge alliances that will benefit both your current and future prospects and clients as well as your family and loved ones. Get your fill of food and drink as you bond with other attendees and prepare for the evening's program.

Then it will be time to gather your popcorn and beverages, and settle into the theater to hear from pioneer Peter J. Strauss of Drinker Biddle as he sets the stage and holds a pointed discussion on the topic in preparation for your viewing of the Glen Campbell Story in the documentary film "I'll Be Me." [Click here](#) if you wish to see his bio.

Learn more about the eldercare issues dealing with 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.

See how Glen Campbell and his family deal with this issue on a very personal level and hear from other professionals and celebrities who have had to face and deal with these issues first hand. Gain a perspective that will help you better assist your clients and loved ones when they are faced with similar challenging situations.

**SEATING IS LIMITED! PLEASE REGISTER BY: Wednesday, June 1st, 2016**

**TO REGISTER:**

Contact your Association Person below.

Registration fee for members and non-members is \$75.00.

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

All food and non-alcoholic beverages included in the price. One glass of wine or beer included in the price.

Cash bar available for additional alcoholic beverages.

**FPA Greater Hudson Valley**

Marcia Kaplan, CFP®

[marcia.s.kaplan@ampf.com](mailto:marcia.s.kaplan@ampf.com)

914-289-0700 x11

3 CFP CE Credits - Program ID 224884

To Register Online please [click here](#)

**NYSSCPA**

Amy Amodeo

[rl@ecker-law.com](mailto:rl@ecker-law.com)

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

3 CPE Credits - Course Code 29112701

To Register Online please [click here](#)

**Westchester County Bar Association**

Luis Rivera, Esq.

[cle@wcbany.org](mailto:cle@wcbany.org)

914-761-3707 x20

Certificates for 3 CLE credits will be provided to Attorney attendees

**Date:** Thursday, June 9th, 2016

**Time:** 5:45 p.m. to 9:30 p.m.

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

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

Westchester Chapter's Sixteenth Annual  
Estate, Tax and Financial Planning Conference  
June 10, 2016

AGENDA

<u>Time</u>	<u>Speaker</u>	<u>Topic</u>
8:30am	Registration	
8:50am	Introduction by Conference co-Chairs Robert L. Ecker, Esq., CPA, LLM and Howard P. Klein, CPA, MS	
9:00am-10:10am	Blanche Lark Christerson, Esq. Managing Director, Deutsche Asset & Wealth Management	Current Developments Affecting Wealth Planning: An Update
10:10am-11:10am	Daniel L. Daniels, Esq. Wiggin and Dana, LLP	IDGT Sales and Succession Planning
11:10am-11:20am	Break	
11:20am-12:30pm	Lawrence Keiser, Esq. Stern Keiser & Panken, LLP	Business Income Tax Issues For Estate Planners
12:30pm-1:30pm	Lunch Lunch Speaker: Sharon Horowitz, PhD. Centernorth, Inc.	Family Concerns In Succession Planning
1:30pm- 2:30pm	Donald Novick, Esq. Novick & Associates, P.C.	Litigation Issues For Estate Planners
2:30pm-3:30pm	K. Eli Akhavan Akhavan Law Group, LLP Jonathan I. Shenkman Oppenheimer & Co., Inc.	Estate Planning For Athletes and Entertainers
3:30pm-3:40pm	Break	
3:40pm-5:00pm	Sharon L. Klein, Esq. Wilmington Trust, N.A.	Current Estate Tax Issues in the Tri-State Area
5:00pm	Closing Remarks by Conference co-Chairs Robert L. Ecker, Esq., CPA, LLM and Howard P. Klein, CPA, MS	

# NYS SOCIETY OF CPA'S - WESTCHESTER CHAPTER

Announces

## THE ANNUAL GOLF OUTING EVENT

# MONDAY, June 13<sup>th</sup>, 2016

### WILLOW RIDGE COUNTRY CLUB

123 North Street – Harrison, NY (914) 967-6161

**PAYMENT RECEIVED PRIOR TO DECEMBER 31<sup>ST</sup>, 2015 - \$300**

**PAYMENT RECEIVED PRIOR TO FEBRUARY 15<sup>TH</sup>, 2016 - \$325**

### SPONSORSHIPS:

Lunch, Golf, Cocktail Hour, Buffet & Dessert\* \$350  
Cocktail Hour, Buffet and Dessert Only \$150

**LIMITED GOLD SPONSORSHIP:** \$1,850 includes  
♦ Sign near tee box area that company sponsored the hole  
♦ Table at registration desk  
♦ Reserved tables at cocktail hour and dinner  
♦ Recognition at dinner  
♦ Brunch, golf, drinks and dinner for one

\* Includes greens fees, forecaddie, cart, and driving range

## Hole Sponsorship - \$150

**\*\*\* CLICK HERE TO REGISTER NOW! \*\*\***

- 🏌️ 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 **sign-in/registration/brunch at 11:00 am, followed by a shotgun start at 12:30 pm.** Cocktail "hour" and hors d'oeuvres will begin at **approximately 5:30 pm** with open bar. Prizes will be awarded during buffet dinner. **ALL PRO SHOP CERTIFICATES MUST BE REDEEMED THAT EVENING.**
- 🏌️ 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 – June 13<sup>th</sup>, 2016

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 for \$ \_\_\_\_\_ is enclosed.

**Send check payable to "NYSSCPA – Westchester Chapter" to:**

**Stanton and Leone  
1025 Westchester Avenue – Suite 301  
White Plains, NY 10604  
Att'n: Jeffrey A. Schwartz, CPA  
Telephone (914) 286-6908  
E-Mail: jschwartz@eba.nyc**



**REMINDERS:**

**Next Gen Food Bank Volunteering**  
at Foodbank for Westchester in Elmsford

**When:** Friday, July 29, 2016

**Time:** 1:00 p.m. - 3:00 p.m.

Followed by a get together at Captain Lawrence

For more information and/or to register please e-mail  
Heather Oboda at: [hoboda@citrincooperman.com](mailto:hoboda@citrincooperman.com)

**SAVE THE DATE:**

**Annual Recruitment Night**

**When:** Wednesday, October 26, 2016

**Where:** Crowne Plaza in White Plains

Firms interested in participating e-mail Heather Oboda at:  
[hoboda@citrincooperman.com](mailto:hoboda@citrincooperman.com) for more information.

Mock interviews will be offered. Anyone interested in  
volunteering to perform mock interviews please e-mail  
Edward Wells at: [ewells@pscparfirm.com](mailto:ewells@pscparfirm.com)

**MARK YOUR CALENDARS:**

**THE ACCOUNTANTS IN INDUSTRY'S CPE EVENT  
SURVIVING SALES TAX**

**When:** Wednesday, September 21st

**Where:** Skadden Arps Slate Meagher & Flom LLP  
360 Hamilton Ave 3rd FL, White Plains, NY

**Time:** 7:45 a.m. 9:00 a.m. (1 CPE)

**Speaker:** Mark Stone, CEO of Sales Tax Defense, LLC

Contact Michael Herz, [michaelbherz@gmail.com](mailto:michaelbherz@gmail.com) for further information



**SAVE THE DATE:**

**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.

Anyone interested in assisting to organize the event or interested in sponsoring or donating raffle items please contact Heather Oboda at:

[hoboda@citrincooperman.com](mailto:hoboda@citrincooperman.com)





# 2016-2017 CALENDAR

<u>Date</u>	<u>Program/Activity/Event</u>	<u>Time</u>
06/09/2016	Allied Professionals Networking Night on Alzheimer's	5:30 p.m. - 9:30 p.m.
06/10/2016	16th Annual Estate, Tax & Financial Planning Conference	8:30 a.m. - 5:00 p.m.
06/13/2016	Annual Golf Outing	All Day Event
06/20/2016	Organizational Meeting	5:30 p.m. - 8:00 p.m.
07/29/2016	Next Gen Food Bank Volunteering Event	1:00 p.m. - 3:00 p.m.
09/21/2016	Accountants in Industry CPE Event - Surviving Sales Tax	7:45 a.m. - 9:00 a.m.
10/26/2016	Annual Recruitment Night	TBD
11/03/2016	NextGen Wine Tasting Event to Benefit Blythedale Hospital	5:30 p.m. - 8:00 p.m.

<u>Newsletter Committee</u>	<u>Phone</u>	<u>E-Mail</u>
Licia Vizcarra	(914) 997-7724	<a href="mailto:Licia.Vizcarra@cmcensullocpa.com">Licia.Vizcarra@cmcensullocpa.com</a>
Catherine Censullo	(914) 997-7724	<a href="mailto:Catherine.Censullo@cmcensullocpa.com">Catherine.Censullo@cmcensullocpa.com</a>

*(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. /_/_/_/_/_/_/_/_/_/	CPA Certificate No. /_/_/_/_/_/_/_/_/_/
Name: (Last, First, Middle Initial)	Name: (Last, First, Middle Initial)
Firm Name _____	Firm Name _____
Firm Address _____	Firm Address _____
City, State, Zip _____	City, State, Zip _____
Business Phone ( ) _____	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)

**06/20/16 @ 5:30 p.m. (Organizational Meeting)**

**Location: Ruth's Chris Steakhouse**

**NEXT NEWSLETTER - SEPTEMBER 2016**



**HAPPY SUMMERTIME!  
ENJOY THE WARM WEATHER!**

