

The New York State Society of Certified Public Accountants



Westchester

Westchester Chapter E-Newsletter

May 2018

**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!

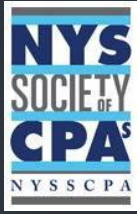
[CLICK HERE TO REGISTER NOW!](#)

- President**
Gina Goodenow
- President-Elect**
Michael Herz
- Vice President**
Heather Oboda
- Treasurer**
Gwendolyn Horn
- Secretary**
Matthew Katz
- Past President**
Catherine M. Censullo
- Executive Board**
Kelly Blacker
Gregory Re
Douglas S. Ruttenberg
Jeffrey A. Schwartz
Richard Terrano
Edward Wells
Robert Winton
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John Brant
Robert L. Ecker
Gina Goodenow
Michael Herz
Matthew Katz
Howard Klein
Heather Oboda
Gregory Re
Deborah Rubin
Douglas Ruttenberg
Jeffrey Schwartz
Richard Terrano
Robert Winton
- Chapter Representative**
Denise Stefano

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Where: Doral Arrowwood

975 Anderson Hill Rd,
Rye Brook, NY 10573

[Register
Online](#)

**Or Call
800-537-3635**

Cost: \$150
members; \$175
nonmembers

**Course Code:
28611933**

**CPE: 8
(taxation)**

*See program
[agenda](#)*

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

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

<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-11:00am	Martin M. Shenkman, CPA, MBA, PFS, AEP, JD Martin M. Shenkman, P.C. <i>and</i> Jonathan G. Blattmachr, Esq. Director of Estate Planning, Peak Trust Company and Director, Pioneer Wealth Partners, LLC	Trust Planning Post TCJA: CPAs Role
11:10am-11:20am	Break	
11:20am-12:30pm	Blanche Lark Christerson, Esq. Managing Director Deutsche Bank Wealth Management	Nearly Six Months Out: Thoughts on the Tax Cuts and Jobs Act
12:30pm-1:30pm	Lunch Eric W. Lutz, Sr. Vice President and Michael S. Tivnan, CLU, Vice President Wells Fargo Advisors	Premium Financing: Rising Rates and Exit Strategies
1:30pm- 2:30pm	Ronald Hegt, CPA Citrin Cooperman	What Do We Really Know About New Section 199A?
2:30pm-3:40pm	Nathan Berti, Esq. Hodgson Russ LLC	Topics In Trust Income Tax and Tri-State Estate Planning
3:40pm-3:50pm	Break	
3:50pm-5:00pm	Joseph N. Endres, Esq. Hodgson Russ LLC	Changing Your Residency Post TCJA
5:00pm	Closing Remarks by Conference co-Chairs Robert L. Ecker, Esq., CPA, LLM and Howard P. Klein, CPA, MS	

**JOIN US AT THE
ACCOUNTANTS IN INDUSTRY COMMITTEE
OF THE NYSSCPA WESTCHESTER CHAPTER
WEDNESDAY MAY 16, 2018**

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

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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:

Lunch, Golf, Cocktail Hour, Buffet & Dessert* \$375
Cocktail Hour, Buffet and Dessert Only \$150

SPONSORSHIPS:

LIMITED GOLD SPONSORSHIP: \$1,900 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
♦ Lunch, golf, drinks and dinner for one

* 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

2018-2019 Chapter Board Accepted Nominations

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

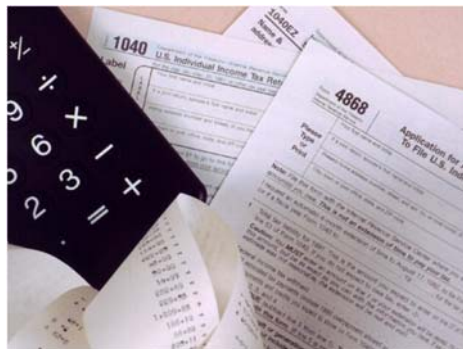
Time: 8 a.m. - 9:00 a.m.

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



2017-2018 CALENDAR

<u>Date</u>	<u>Program/Activity/Event</u>	<u>Time</u>
05/16/2018	Accountants in Industry CPE - How to Keep Your Clients Out of Medical Bankruptcy	7:45 a.m. - 9:00 a.m.
05/29/2018	Westchester Chapter President's Dinner Reception	6:00 p.m. - 9:00 p.m.
06/06/2018	Accountants in Industry CPE - Understanding Today's Stock Market	7:45 a.m. - 9:00 a.m.
06/11/2018	Westchester Chapter 18th Annual Estate, Tax & Financial Planning Conference	9:00 a.m. - 5:00 p.m.
06/19/2018	Organizational Meeting/Dinner	5:30 p.m. - 8:30 p.m.
08/13/2018	Annual Golf Outing	All Day Event

<u>Newsletter Committee</u>	<u>Phone</u>	<u>E-Mail</u>
Licia Vizcarra	(914) 997-7724	Licia.Vizcarra@cmcensullocpa.com
Gina Goodenow	(212) 251-4042	GinaGoodenow@gmail.com

(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. /_/_/_/_/_/_/_/_/_/

Name: (Last, First, Middle Initial)

Firm Name _____

Firm Address _____

City, State, Zip _____

Business Phone () _____

CPA Certificate No. /_/_/_/_/_/_/_/_/_/

Name: (Last, First, Middle Initial)

Firm Name _____

Firm Address _____

City, State, Zip _____

Business Phone () _____

Return this form to: Membership Dept., NYSSCPA, 14 Wall St, 19th Floor, New York, NY 10005

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!

Memorial Day

