



## LONG ISLAND CHAPTER

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### A MESSAGE FROM THE PRESIDENT

Dear Members:

The past few weeks have been difficult for our Long Island IMA Chapter. On February 11, 2016, Past President and dedicated board member Stephen Antaki passed away. Mr. Antaki was a partner at Long Island based Public Accounting firm AVZ. He joined the firm in 1982 and was admitted as partner in 1999. In addition to serving his clients, he was a regular lecturer on various business and accounting issues and professional development strategies.

Steve volunteered in many local and civic organizations. In addition to serving as Past President of the Long Island Chapter of IMA, he served on the boards of Friends for Community Services of Oyster Bay and the Suffolk Chapter of Habitat for Humanity. He is a former trustee of NuHealth and

a member of the Energiea Class of 2011. He was actively involved in his parish of St Rose of Lima in Massapequa. He was a longtime coach for CYO Basketball and as a black belt in both Karate and Judo he instructed many students.

I had the pleasure of working alongside Steve on the Board for many years. He was a wonderful genuine man who had a way of personally connecting with everyone he met. He will be greatly missed by all.

Steve is survived by his wife Terri and three sons. Our thoughts and prayers will continue for Steve's family.

Amy Abrie



## Woodbury Country Club

884 Jericho Turnpike, Woodbury, NY

Tuesday, March 8, 2016 • Cocktail Hour begins at 6 pm



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### CEO Panel

Speakers:



**Robert Levine, CEO**  
Peerless Electronics, Inc.



**Roy Ryniker, President**  
Positive Promotions, Inc.,



**Jerry DiCunzolo, CEO**  
United Electric Power

Moderators: *Cindy McLoughlin, Partner, CohnReznick, Steven Kuperschmid, Partner, Silverman Acampora LLP*



## A Tribute to Our Friend Stephen A. Antaki, Partner, AVZ



It is with broken hearts that we tell you of the untimely death of one of our Partners, Steve Antaki. Steve joined AVZ in 1982 and has been a Partner since 1999. His countless contributions to AVZ are all around us. He was a pivotal part of growing and nurturing our government business. He formed deep and lasting relationships with all his clients, many of whom counted him among their closest friends. We can spend countless hours talking about Steve the Partner, but instead we wanted to share with you our thoughts about Steve, the husband, father and friend.

Steve had a “big” personality; he was funny, generous, smart, mischievous, honest, trustworthy, dependable, kind and always willing to lend a helping hand. As big as Steve’s personality was it only paled in comparison to his heart. He lived life to the fullest and touched so many people along the way.

As we reflect back on the time we spent with Steve we see him through the prism of all the roles he played in life. We see him first and foremost as a family man. He loved his wife Terri, (his bride as he called her), and their three sons, Stephen, Andrew and Alex unequivocally and selflessly. He strove to honor, support, guide and most importantly love each and every member of his immediate and extended family. He was at his happiest when he was surrounded by them and his devotion was the foundation upon which he shaped and defined everything he did in life.

We see Steve, the friend. He was a good friend to so many! He could be counted on and depended upon always. Whether you needed some good advice, an empathetic ear, a shoulder to lean on, someone to have a few drinks with, a golfing buddy or basketball player - Steve was your man. Ready, steady, willing and always fun to be around.

We see Steve the respected Partner and colleague. He lived such a principled life, with a strong sense of right and wrong. He never stepped back from a challenge and always cared enough to act and take a stand. He shared his expertise with his AVZ family, his clients and associates. Through the years he mentored many young professionals and served as an incredible role model to so many others as well.

It’s impossible to pay tribute to Steve without recognizing the role his faith played in his life. Steve’s spirituality was the guiding force behind everything he did. He always tried to be the best he could be - family man, friend, Partner, colleague or champion to others.

Saying goodbye to Steve seems surreal. We haven’t fully digested all that’s happened this past week. Not only is it hard, but it’s not what we want to do. We know Steve’s presence will always be felt within the walls of AVZ. He touched so many people’s lives in such a positive way. He leaves an amazing legacy behind and left this world a much better place than how he found it. We are luckier for having known him and feel privileged to have had the chance to spend time together, however short it seems today. We will miss him terribly and remember him lovingly. Please keep his family in your thoughts and prayers.





**Quote**

“If you are not willing to risk the usual, you will have to settle for the ordinary.”

- *Jim Rohn*

**2016 Dinner Meeting Schedule**

April 12, 2016	Best Practices for hiring and firing
May 10, 2016	Annual FEY Event

**Quarterly Breakfast Series**

April 26, 2016	Fiduciary responsibility with regard to retirement plan assets
July 26, 2016	Ethics

**Gleim Discount on CMA Study Material**

LI IMA Chapter members receive a significant discount off all CMA study materials, as well as Gleim CPE (including new ethics course).

**CONTACT** Melissa Leonard at melissa.leonard@gleim.com or call 1-800-874-5346 x131 to take advantage of this offer or contact Arthur Sanders, at asanders@optonline.net or call 516-697-3900 for more details.

**PLEASE VISIT:**

[www.gleim.com/IMACHapter](http://www.gleim.com/IMACHapter) for more information on the CMA Exam or how Gleim can help prepare you for success.



**MEETING TIMES**

Please note the dinner meetings at **The Woodbury Country Club at 884 Jericho Tpke, Woodbury, NY** will now take the following format:

6:00pm to 7:00pm - Registration & Professional Networking  
 7:00pm to 7:30pm - Dinner Served  
 7:30pm to 8:30pm - Speakers / Q&A / Wrap Up



## IMA GLOBAL NEWS

### Economic Slowdown Poised to Continue to Dominate International Business Landscape, says IMA/ACCA Report

Economic Slowdown Poised to Continue to Dominate International Business Landscape, says IMA/ACCA Report  
Falling income is the biggest concern for global businesses, according to the Global Economic Conditions Survey (GECS), the latest and largest regular global survey of finance professionals. Nearly half of businesses (46%) reported a decline in earnings in the fourth quarter of 2015. The GECS report, published by IMA® (Institute of Management Accountants) and ACCA (the Association of Chartered Certified Accountants), can be viewed on the IMA/ACCA partner page.

The survey of more than 2,500 finance professionals and more than 200 chief financial officers (CFOs) around the world also shows that business confidence has hit rock bottom, where 44% of respondents were less confident than three months earlier.

Businesses not only reported a fall in income, but also more difficulty in accessing finance, with half of them cutting their workforce or putting a recruitment freeze in place, and 40% saying they had cut back investment plans since the third quarter of 2015.

The United States economy continues to perform relatively well, even if business confidence was undermined last quarter by the strength of the U.S. dollar and the prospect of a rate hike. Data showed the U.S. economy grew by a relatively healthy 2.1% in Q3, retail sales continued to expand in October and November, and auto sales hit a record high for the year. Moreover, concerns that the labor market was losing momentum were eased by strong employment gains. In October to December, non-farm payrolls increased by an average of 284,000 a month, up from an average of 174,000 in the third quarter.

“Despite this overall good news, there is a clear divergence

within the U.S. economy,” said Raef Lawson, CMA, CPA, Ph.D., IMA vice president of research and policy. “While domestic-oriented sectors have benefited from the strong labor market and U.S. dollar, the manufacturing and energy sectors continue to perform poorly, in part due to oil prices.”

Confidence remained especially weak in emerging economies. China’s slowdown is affecting business confidence around the world and contributing to serious problems in other major emerging economies, especially those that rely on commodity exports, such as Brazil and Russia.

As the price of oil continues to tumble the producers that were relatively well prepared for a drop in energy prices, like Saudi Arabia and the UAE, are now facing weaker growth as governments turn their attention to repairing their finances. More than 60% of respondents in the region reported they had cut back on investment and employment. Businesses in OECD economies are more upbeat. Most advanced economies are net importers of energy and have benefitted from declines in oil prices.

The most significant improvement in business confidence was in the eurozone, where the risk of a near-term break-up of the currency area has faded into the distance after the latest Greek bailout.

Rising costs were still a problem, with 40% of businesses reporting concerns. While commodity prices have fallen, firms in many parts of the world, particularly Asia and Africa, are still having to deal with rapidly rising wages.

You can view the full GECS report on the IMA/ACCA partner page.

## HOW TO INCREASE INNOVATION THROUGH MANAGEMENT AND MEASUREMENT

This report discusses how accounting and finance leaders can take an active role to increase innovation in their organizations through a supportive culture, processes, and measurement.

### Overview and Key Insights:

Innovation is a hot topic in the business world. There has been a lot written about the importance of innovation and role of the CFO in creating a culture that encourages innovation rather than squelching it. What does not get discussed much is how to increase innovation through management and measurement. This report summarizes the findings of a survey conducted in 2015 by the IMA® (Institute of Management Accountants) on innovation practices by companies around the world.

More than half of the respondents said their firms don’t measure innovation at all. Those that do tend to use simple measures such as the number of new products, services, and/or patents, and the percentage of sales revenue from new products. Yet almost all felt their organizations should measure innovation

success. Furthermore, three-fourths said their organizations must significantly evolve or reinvent their business value propositions at least every five years.

Senior finance and accounting leaders are increasingly being asked to lead, support, or measure innovation efforts in their organizations. The CFO is well positioned to lead and support this activity. The more importance placed on innovation in the organization, the more comfortable the accounting and finance leaders feel leading innovation efforts. The report discusses ways that CFOs can lead and support innovation governance in their organizations, such as making innovation part of the planning and budgeting process and establish processes for pursuing innovation initiatives.

### To download this report:

<http://www.imanet.org/docs/default-source/default-document-library/innovation-management-and-measurement-1-27-163eb4d8dc18cd658b8bd3ff00003d9775.pdf?sfvrsn=2>



## CMA NEWS

### The Advantage of Being a CMA

*By Arthur Sanders, Past President LI Chapter*

For more than 40 years, the CMA has served as the mark of excellence in management accounting; the true assessment of relevant knowledge and skills. Our commitment to supporting you doesn't end once you receive your CMA certificate. IMA is here to help you set the standard and take your career to the next level. Take advantage of the resources IMA has to help you make the most of your credential.

Promote your CMA credential by educating your employer and colleagues about the value of the CMA and what you bring to the organization. As a CMA you are part of a worldwide network of professionals. You can connect with other CMAs through Link up IMA, LinkedIn, or through our local chapter programs. Stay up-to-date with CMA Connections, our exclusive e newsletter for

CMAs and candidates. Learn about the latest news about the CMA program, read stories about CMAs, and see how the credential is impacting the profession.

Whether you're looking for a new job, have a position to fill, or need useful career resources...the IMA is here to help.

The Long Island IMA chapter is looking to increase the number of CMAs in our chapter. If you would like to learn more about the CMA designation and how to obtain it, please contact me. I look forward to speaking to you.

Arthur Sanders, Past President LI Chapter  
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LONG ISLAND CHAPTER

March  
2016

# ANNUAL CONFERENCE



## EARLY BIRD REGISTRATION

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## Welcome To Our Newest Members!

Academic Member: Robert Valli

Regular Members:

Michael Blueweiss

Ronnie Kim

Kevin Levine

Ross Selinger

Student Members:

Daniel Ashby  
Eric Biedermann  
Andres Carrion  
Samantha Delio  
Ingy Ghobashy  
Matthew Ginobbi

Andrew Graham  
Benjamin Hart  
Matthew Hecker  
Artur Katsev  
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## THIS MONTH'S MEMBER SPOTLIGHT

### Vito A. Gaeta, MBA, CPA

I had never pursued networking contacts with vigor. Sure I attended mandatory CPE and caught up with my peers. I had a small group of good friends and we regularly traded news and technical problems. My family took up most of my time, of course playing basketball, cycling and drumming took their fair share too.

Over the years the economy and some fundamental aspects of the employer/employee relationship changed. I found that hard work and dedication could not protect me from layoffs. The economy could cycle down quickly – I was one of 60,000 laid off by Ericsson. Some companies got sold or moved; Symbol was acquired by Motorola (then later Zebra), George Weston bakeries (Entenmann's) moved their corporate offices, and my job, to Pennsylvania.

My natural inclination is to just work harder and more, but that had been recently proven ineffective. I became "in transition", again.

A long-time friend, whom many from this chapter are familiar with, recommended that I join the IMA. Jim Smith had invited me to join frequently, over the course of ten years. The benefits, he said clearly outweigh any pain I might experience from shyness. These people are friendly. They like to meet people. They will become an extended support group for you, if you do the same for them.

So I came to a meeting and found that Jim was wrong. These people at the IMA were not nice. They were too nice. I got better at telling my story, hitting the highlights and shortening it, so that I could learn about the people I was meeting. After a few meetings it actually became fun to attend. Most importantly I felt that the IMA membership at large would help me if they could.

Jim volunteered me to work on the Student Activities Committee establishing the scholarship program. Although this ate some time, it gave me a project where I could give back to the organization as a whole.

Recently a long-time friend, who I have been trying to coerce into joining the IMA found herself "in transition". I'm glad to say that her first meeting went really well. Everyone we bumped into was too nice, they shared their time and story, and offered support to someone they had just met.

I joined the IMA because of need. I needed to expand my network. I found great people, so great that I am espousing the benefits to potential members hoping they can all share stories and experiences.



## MEMBERSHIP BENEFITS



### Health Insurance

GetInsured gives you simple, plain-language answers to your health insurance questions. After all, when you understand your options, you can make smart decisions. GetInsured walks you through the process—from seeing if you qualify for tax credits to giving you personalized recommendations for health plans.



## MOST FREQUENTLY ASKED QUESTIONS ABOUT THE ACA ANSWERED

*By: Steven Goldstein of Grassi & Co.*

During a recent ACA Town Hall Meeting led by Steven Goldstein, CPA, PFS, Audit Partner, it was revealed that many executives in the construction, nonprofit, manufacturing & distribution, and healthcare industries continue to have unanswered questions about how to keep their companies compliant. Below are just a few of the frequently asked questions regarding particular situations as they relate to the ACA and compliance, and the best course of action per Steven.

### **Q. How should an employee who chooses to waive coverage be reported on form 1095?**

A. My advice is to have documentation in the employee's folder that they did indeed waive coverage (when the spouse of employee will provide coverage). In regards to form 1095-C, box 14 should have a code 1a, which indicates that minimum essential coverage providing minimum value offered to full-time employee with employee contribution for self-only coverage equal to or less than 9.5% mainland single federal poverty line and at least minimum essential coverage offered to spouse and dependent(s).

Box 16 should have code 2f—assuming the W-2 safe harbor approach is used to determine affordability, and it is affordable. If an employer uses this safe harbor for an employee, it must be used for all months of the calendar year for which the employee is offered health coverage.

### **Q. How should form 1095-C be filed for a former employee who is offered Cobra coverage?**

A. In Box 14, indicate 1h (no offer of coverage), which states that the employee was not offered any health coverage or the employee was offered health coverage that is not minimum essential coverage. In box 16, indicate 2a (employee not employed during the month).

### **Q. How should form 1095-C be filed for union employees who are covered under a collectively bargained agreement and who are employed by an employer who contributes benefits?**

A. In box 14, indicate 1h (no offer of coverage). In box 16, indicate 2E (multiemployer interim rule relief).

### **Q. What if you are an employer who employs less than 50 full-time employees?**

A. Any employer who employs less than 50 full time employees is not required to provide coverage or fill out any forms in 2015. The 1095-B will be provided by the health insurance provider.

"Employer shared responsibility has also been a frequent topic of discussion and confusion," states Goldstein. According to the transition relief section, below are some additional guidelines to follow regarding employer shared responsibility:

Applicable Large Employers (ALEs) with fewer than 100 Full-Time Employees (FTEs)—including full-time Equivalent Employees— will not be subject to the employer shared responsibility provisions in 2015. In addition, an employer with a non-calendar year plan year, for the months in 2016 that are part of the 2015 plan year, will also not be subject to the Employer Shared Responsibility Provisions (ESRP) provided certain conditions are met regarding the employer's maintenance of workforce and pre-existing health coverage. For more information on this relief, see section XV.D.6 of the preamble to the ESRP regulations. Even if an employer is eligible for this relief, the employer is still required to complete the related information reporting for 2015.

The rules of the Affordable Care Act (ACA) will continue to change per calendar year so it is vital that your company have the proper team in place to help stay abreast of changes and keep your company compliant.



## LAST MONTH'S MEETING

### Meeting February 9th

*By: Bob Arnold, Jr., Vice President, Arnold Standard Cos.*



On February 9, 2016, the IMA hosted its monthly dinner meeting. The panel discussion was entitled “Cyber Risk Assessment and Management”, and our panel of experts included the Honorable Michael A.L. Balboni, Managing Director of Redland Strategies, Michael O’Neil, CEO of MSA Security, and James Bourie, Co-Founder & CEO of Nisos Group. After brief introductions, and a deserved display of gratitude from the audience honoring our panelists’ service to our Country, State and the Greater NY Metropolitan Region, we dove into the subject matter.

We kicked off the conversation acknowledging that the number of perpetrators is growing every day, and we increasingly face threats from national governments, terrorists, industrial spies, organized crime groups, hacktivists, and hackers; whose activities include espionage, hacking, identity theft, crime, and terrorism.

We gained insight into employable strategies including Managing the Data; Securing the Operating Systems; Managing the People Who Interact with the Data, including employees, as well as third parties, such as vendors; and other actions to protect your systems and data.

The evening concluded with a robust Q&A period. Ultimately, the takeaway for the evening was that when looking to assess and manage your cyber risks, you really need to utilize a three pronged approach that encompasses: Protection, Detection, and Response.





## IMA STUDENT ACTIVITIES

### Student Influencer Program and a “Shout out” to Our Local Volunteers

*By James L. Smith, CPA, VP of Student Activities*

The IMA has always been a strong supporter of the Students and Universities, as we all like to say, “Today’s students are our future leaders!” These are not just words but a core commitment and belief of the IMA Global Leadership.

Last week, the IMA initiated a new program, “Student Influencers”. This program is designed to share information and techniques for Chapters to use in order to connect with students and their local universities to increase student membership and participation. There are 3 core aspects to this program: the IMA Global Team will provide direct support the form of presentations, sharing of best ideas and direct support to our local Chapter(s) by following up with the students and Universities after each meeting and presentation. As the Chair of the Student Activities Committee for the LI Chapter I can tell you that the added resources and expertise that is being provided is fantastic.

Over the last 3 years, the LI IMA Chapter has added 4 Student Chapters and currently has over 100 members comprised of students, faculty and young professionals. We are engaged with more than 8 Universities / Colleges and average 12 campus visits per year. The time and energy required by

our volunteers to maintain such a robust program cannot be understated.

It is important to note that wonderful initiatives such as this would not happen if not for the support of the Board of Directors, IMA Global and especially the local IMA Chapter members who donate their time and energy to connect with the students and Universities.

In my role as Chair of the Student Activity Committee, I would like to acknowledge all of our volunteers for their hard work and efforts:

- Bob Arnold Jr., Past President**
- Marvin Rosen, Board Member**
- Karen Marshal, Board Member**
- Vito Gaeta, Member**
- Anthony Tallini, Member**
- Kelcie Valentiner, Member**

You have all done and continue to do a wonderful job for the Students, Universities and the IMA.

Thank You!

## IMA EMPLOYMENT SERVICES

### Staying Connected

*By Randy DeYulio, VP Employment Services*

For many professionals, changing jobs is an infrequent occurrence. So even the most talented business professionals can be left unprepared or uncertain where to turn when searching for a new position. Many professionals have forgotten the importance of staying connected with colleagues and maintaining their professional network or are simply out of practice. This may cause additional anxiety when trying to find their next position. Opportunities can come from anywhere, but the best way to improve your chances of hearing of them is to actively maintain and grow your network. This is where the IMA Employment Services Committee can help.

The IMA is committed to providing valuable services to its members. The Employment Services Committee has continued to create a database of professionals in transition, as well as, job openings. Currently, our database includes job openings ranging from bookkeepers, internal auditors, and staff accountants to treasurers, controllers and CFOs. The Employment Services Committee updates the database frequently and has the simple goal of connecting potential candidates with companies in search of talented professionals.

With the turn of the calendar year, the Employment Services Committee has received new job postings and has listed a few of them on the IMA website under the Employment page. If you are interested in any of those positions, please reach out to me at [employment@ima-longisland.org](mailto:employment@ima-longisland.org). Also, please continue to submit resumes of qualified candidates or job postings in confidence to our website or through an IMA Board member.

As an additional request, please notify the Committee of your Human Resource or Talent representative, as the Committee would like to develop a database of these professionals to increase the chance of hearing of future job openings, which should benefit all of our members. As a reminder, these services are at no cost to either the professional seeking employment or the company with the job posting.

Currently the Employment Services Committee is focusing on Accounting, Finance, Internal Audit, and Tax positions for its members.

For further information on these services, please contact Randy DeYulio at [employment@ima-longisland.org](mailto:employment@ima-longisland.org).



## ABOUT OUR CHAPTER

The Long Island Chapter of the Institute of Management of Accountants was chartered in 1951 by the then National Association of Cost Accountants (“NACA”). Over the years the name was changed to the National Association of Accountants (“NAA”) and now is known as the Institute of Management Accountants (“IMA”). Harold Nohe was the first President of the Long Island Chapter.

In 1970 the Long island Chapter was split into two Chapters, one in Nassau and one in Suffolk. The first President of the Suffolk Chapter was Paul Urban. The two Chapters co-existed until 1986. The two Chapters met the second week of the month with Nassau meeting on Tuesdays and Suffolk meeting on Thursdays. There were numerous members who attended both meetings.

In 1984 and 1985 both Chapters experienced a decline in membership and meeting attendance. A committee

was formed of Donald Green and Marc Palker from Nassau and Eric Perlman and Charles Schreiber from Suffolk. In 1986 with the permission of the National Office and the Board of Directors, the two Chapters were merged to reform the Long Island Chapter. Donald Green was the first President of the reformed Long Island Chapter.

In 1987 the Past President’s met to decide how best to help the Chapter prosper and grow. From these meetings the Financial Executive of the Year Award was born with the first recipient being Sanford Weintraub, CFO of Independent Election Corp of America. This award still exists today and is named after the man whose idea became the finale of our Chapter year, The Milton Zipper Financial Executive of the Year Award Dinner.

As they say, the rest is history.....

## ABOUT IMA

The Institute of Management Accountants (IMA) is the world's leading organization dedicated to empowering management accounting and finance professionals to drive business performance.

IMA members are today's leaders, managers, and decision makers in management accounting

and financial management. As members we are dedicated to continued professional development, to achieving the highest levels of professional certification, and to supporting each other in our commitment to professional excellence.

[www.imanet.org](http://www.imanet.org)

### Quote

“Management is doing things right; leadership is doing the right things.”

- *Peter F. Drucker*