



The Association of  
Accountants and  
Financial Professionals  
in Business



Summer  
2016

LONG ISLAND CHAPTER



# Woodbury Country Club



**884 Jericho Turnpike, Woodbury, NY**

Our meeting schedule for the 2016-17 year has been set. The monthly dinner meetings will take place on the second Tuesday of every month.

Our first dinner is set for September 13th. The cocktail hour begins at 6:00PM followed by dinner. Every dinner program qualifies for 1 CPE credit.

The quarterly breakfast meetings will take place on the dates noted below, all within the Melville Corridor. Locations of the breakfast meetings may vary and will be communicated in the monthly newsletters. These meetings begin at 7:45AM with a continental breakfast and brief opportunity to network, they end at 10:00AM. Each session qualifies for 2 CPE credits.

**ADVANCE PRICING & PAYMENT for Dinner Meetings:**

\$55.00 Members / 75.00 Non-Members, Preregister online: [LongIsland.IMANet.org](http://LongIsland.IMANet.org)

*Please note: there is a \$10.00 additional door registration surcharge - so please register online*

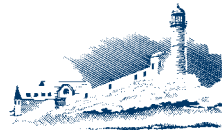
## 2016-2017 Dinner Meeting Schedule

September 13, 2016	White Collar Fraud-What you need to know about Internal Controls <b>Sam Antar- Former CFO Crazy Eddie (2 CPE Credits)</b>
October 18, 2016	Integrated Reporting – Reporting of an organizations Strategy, governance, performance & prospects in a commercial, social and environmental context
November 8, 2016	Successful Career Strategies for the CFO
December 13, 2016	Holiday Event – Casino Night
January 10, 2017	Economic Update
February 14, 2017	The Owner’s Journey-Business Transition- Family & Non Family Businesses
March 14, 2017	CEO Panel
April 11, 2017	Generational Panel – How to Manage the Difference in the Generations as an Employer & Employee
May 9, 2017	Annual Financial Executive of the Year (FEY)

## Quarterly Breakfast Series

October 25, 2016	Current Employment Law Issues & DOL Policies
January 24, 2017	GAAP and Tax Update
April 25, 2017	Accounting -Cloud Technology Vs Hard Drive
July 25, 2017	Forensic Accounting

Sponsorship Opportunities Abound!!!  
Sponsor a dinner, breakfast, newsletter, and website - see page 6



**INSTITUTE OF MANAGEMENT ACCOUNTANTS - LONG ISLAND CHAPTER**  
**2016 Milton Zipper Financial Executive of the Year**  
**Ana Tavares, VP Finance and Accounting, Canon USA, Inc.**

by Jim Smith

May 10th marked the end of a very exciting year for the LI IMA Chapter with our most prestigious evening celebrating the Milton Zipper Financial Executive of the Year Award. This year's award winner was Ana Tavares, VP Finance and Accounting, Canon USA, Inc. a truly exceptional selection. This was an evening of celebration and excitement that displayed the best of Long Islands Business Leadership. With over 168 attending this special night, there was an energy and excitement that you rarely see. The attendees were a vibrant mix of Senior Business Leaders and young business professionals looking to meet Ana, the Canon Management Team, LI Executives and of course the IMA Leadership, headed by Amy Abrie, LI Chapter President, IMA Past Presidents and Marc Palker the current IMA Global Chair Elect (a rare and special opportunity). The Award Ceremony itself was grand and personal. Several distinguished Leaders from the IMA spoke about Ana, Long Island and the history of the FEY. It was especially exciting to hear the CFO of Canon USA, Inc., Mr Yoshinori ("Josh") Shimono talk about Canon's roots on LI (over 40 years), it's appreciation of the Long Island Community and LI's support

of Canon USA, Inc. and Ana's importance to both Canon's and Long Islands future. The FEY Award has been presented annually since 1989 to Financial Executives on Long Island who have a track record of Outstanding Achievements in the field of Finance and Accounting, a strong Commitment to continuing education, and proven track record of Contributions to the Long Island Business Community. The winner is selected by a committee of former Presidents of the IMA after a rigorous review process that spans several months and considers many of LI's Top Business Leaders. Ana embodies the qualities that this prestigious award stands for. In her career on Long Island, Ana has made bold impacts on 2 of Long Island's premier companies Pall Corporation and Canon USA, Inc. In both companies she brought energy, vision and a direction of excellence using her vast experience as a global executive in the areas of Shared Services. Outside of Canon, Ana has made her mark with the local business communities and our local Colleges & Universities such as Stony Brook University.





## 2016 IMA Conference & Expo

IMA's Annual Conference & Expo was held Saturday, June 18th through Wednesday, June 22nd in Fabulous Las Vegas. And fabulous the conference was, affording the nearly 1,000 attendees to earn up to over 30 hours of NASBA-approved CPE credits in a wide variety of interesting and relevant topics, as well as a plethora of opportunities to network with their peers.

Attending this year's Annual Awards & Dinner Celebration was a very special honor and privilege, as Marc Palker, CMA was installed as the IMA Chair for the 2016-2017 year, culminating his more than 40 years of service and leadership to IMA at the chapter, council, national, and global levels. As our new Chair of the Global Board of Directors, we look forward to Marc's resolve in continuing to build on the success

*Bob Arnold, Jr., Past President* of IMA, and his goal of helping move IMA ever higher up the ladder in terms of global recognition and influence.

It was also an honor to accept an award on behalf of the Long Island Chapter, which was recognized for its success in the 2015-2016 IMA Competition. The Chapter won Runner Up for the Community Service Award thanks to the work of the Employment Services Committee, chaired by Randy Deyulio, CPA. The Committee has done great work assisting members' companies with open positions, and members in transition to fulfill those needs.

The 2017 Conference will be held June 17th through the 21st in beautiful Denver, CO. For more information, please see the conference website. [www.imaconference.org](http://www.imaconference.org)





HAVE YOU MET THE NEW BOARD OF DIRECTORS . . .

President . . . . . Amy Abrie, CPA
Secretary/VP Admin . . . . . Renee Sumpter, CPA
Treasurer . . . . . Justine Roe, CPA
VP Communications . . . . . Joseph Giacinto
VP Education . . . . . Donna Blanc, CPA
VP Employment Services . . . . . Randy Deyulio, CPA
VP Membership . . . . . Vincent Palazzolo, CPA
VP Sponsorship . . . . . Carmela Borzelleri, CPA
VP Student Activities . . . . . James Smith, CPA

Board Member . . . . . Anthony Aronica, CPA
Board Member . . . . . Ayanna Newell
Board Member . . . . . Eric Monroe
Board Member . . . . . Gail Trugman-Nikol
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**The IMA would like to Thank the following for being a Dinner Sponsor this past year:**



**We would also like to Thank the following for being a Breakfast Sponsor this past year:**  
 PBIPayroll • Mendels & Associates • Santander US • Alcott HR  
 Bank of America Merrill Lynch • Creative Plan Designs, Ltd



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## 2016 – 2017 Sponsorship Program

Please check all that apply:

<input type="checkbox"/>	<b>Complete Package</b> - Dinner Meeting (includes attendance for two at the event), Newsletter Business Card Ad #1, Web Site Sponsorship	<b>\$875</b>
<input type="checkbox"/>	<b>Dinner Meeting</b> - (includes attendance for two at the event)	<b>\$425</b>
<input type="checkbox"/>	<b>** Value Dinner Meeting</b> - Two Dinner Meetings ** ( Each additional Dinner Meeting - \$375)	<b>\$800</b>
<input type="checkbox"/>	<b>Breakfast Meeting</b> - (includes attendance for two at the event)	<b>\$200</b>
	<b>Newsletter -</b>	
<input type="checkbox"/>	Full Page Ad	<b>\$150/issue</b>
<input type="checkbox"/>	Half Page Ad	<b>\$100/issue</b>
<input type="checkbox"/>	Quarter Page Ad	<b>\$75/issue</b>
<input type="checkbox"/>	Business Card Ad #1 - All issues for 1 year	<b>\$250</b>
<input type="checkbox"/>	Business Card Ad # 2 - \$25 / issue - 4 issue minimum	<b>\$_____</b>
<input type="checkbox"/>	<b>Web Site</b> - Banner Ad/Link – 1 Year	<b>\$250</b>
	<b>Less:</b> Discounts above * (if applicable)	<b>\$_____*</b>
	<b>TOTAL</b>	<b>\$_____</b>
	* Partial-page Ads in 4 or more issues will enjoy a 10% discount *	

Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

**DINNER AND BREAKFAST MEETING SPONSORSHIPS SELL OUT FAST – PLEASE RESPOND ASAP**

Event sponsors receive dedicated space during the events networking hour and introduce their company and services to the directly to the audience with a short speech. For more information or to reserve a sponsorship spot at an upcoming event, please contact:

**Carmela P. Borzelleri, VP of Sponsorship at [sponsorships@ima-longisland.org](mailto:sponsorships@ima-longisland.org) or call (631) 249-1134\*115.**

Please mail this form and check payable to **IMA LI Chapter** to: Institute of Management Accounts, 55 Grand Avenue, Suite 1F, Rockville Centre, NY 11570, Attention Justine Roe. To pay by credit card please use our credit card authorization form or contact Carmela to receive a secure payment link through our website. **Thank you.**



## NEW MEMBERS

*Send or bring a friend or business associate to an IMA meeting!*

Your help is needed to keep our Chapter growing. Please submit the name of a prospective candidate who might be interested in IMA membership to our Vice President of Membership:

Vincent Palazzolo  
CPI Aero  
91 Heartland Blvd  
Edgewood, NY 11717

## YOUR NEWSLETTER EDITOR

Your newsletter editor is always looking for information about you and other chapter members, as well as significant issues concerning our Long Island community relative to accounting and business matters. Please forward all personal notes for possible inclusion in the newsletter to the editor:

Joseph Giacinto  
c/o PBIPayroll  
580 Mineola Avenue  
Carle Place, NY 11514  
(516) 338-5454  
Communications@IMA-LongIsland.org

## REMEMBER TO PRE-REGISTER ONLINE

In our efforts to serve you better and to avoid long lines at the registration table, we encourage you to pre-register and pre-pay for breakfast and dinner meetings on our website: [LongIsland.IMANet.org](http://LongIsland.IMANet.org)

A \$10.00 surcharge will be applied for registration at the door of the event.



## Tips for Hosting a Workplace Summer Soirée

By Christine Malafi, Esq., Partner, Campolo, Middleton & McCormick

Fireworks. Barbecues. Lemonade. A refreshing dip in the pool. Summer has a way of bringing out the “sunshine” in everybody. Hosting a summer event is a fun, enjoyable way to thank employees for their efforts and celebrate the pleasures of summer on Long Island. But before you dive in, it’s important to consider potential legal issues that could quickly make you forget the fun.

Serving alcohol is always a risk, raising the potential for accidents and injuries, as well as inappropriate behavior and lawsuits. But employers can reduce risk through advance planning. While liability generally does not attach to “social hosts” for accidents or injuries suffered off-premises by third parties as a result of alcohol served by the host, at least in New York, if an employee leaves an office party and travels directly to another state, New York law may not prevent liability. Additionally, no one under the age of 21 may be served alcohol at a party, or the host may be held liable if someone is injured by that underage drinker. The safest way to prevent potential liability relative to physical injuries involving alcohol use at a summer office party is to hire bartenders to serve the alcohol and ensure that alcohol is not served to underage party guests.

Another risk associated with alcohol consumption is the level of “celebration.” As an employer, you do not want managers and/or supervisors acting inappropriately or provocatively, or flirting, with your staff. The warm weather and laid back atmosphere of summer can make some people feel it’s okay to act inappropriately in a party setting. It’s not. The same workplace standards of a non-hostile work environment and non-harassing conduct apply to and should be enforced at all office gatherings. On a related note, if the party will have music, employers should check the song list for offensive material.

Employers are also advised to carefully consider the nature of the party itself. Depending on the size and

dynamics of your group, it may not be worth the headaches and potential exposure (literally) to have a pool party, which comes with its own set of issues involving appropriate clothing/swimsuit choices, as well as safety risks. An outdoor picnic with a casual dress code may be a better option. You don’t want to return from July 4th weekend facing a lawsuit alleging a hostile work environment or discrimination.



Additionally, it is probable that a court would find that employees’ attendance at an office party relates to their employment, even if attendance is voluntary, potentially triggering workers’ compensation benefits for injuries sustained during the party (and potentially afterwards). To avoid potential wage claims, if attendance is required, the party should be held during normal work hours. Employers must take reasonable steps to protect their employees and guests from injury, whether at the workplace or an off-site location where the party is held.

To help set your mind at ease before your summer event, consider doing the following:

- Skip pool-related events
- Have transportation to and from the party available
- Hire a professional bartender or caterer with sufficient liability insurance
- Provide non-alcoholic drinks
- Have management/supervisors at the party on the lookout for excessive drinking and/or inappropriate behavior
- Invite employees’ family members to participate
- Make sure employees know that they are not required to attend

A little advance planning can go a long way. If you have any questions, please feel free to contact us.