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Lifetime Spousal Trusts: To Have and To Hold Your Marital Assets

Frequently, married couples have the desire to bequeath all of their assets to each other upon their passing. However, there may be reasons for spouses to instead transfer assets to each other during their lifetimes. Specifically, they may want to consider transferring assets to each other through the use of trusts. There are a number of benefits to using trusts, [click here](#) to read our full blog and learn more about those benefits.

Getting to Know Our Team...

Denise Campisi is an Executive Assistant at Katz, Smith & Chwat, P.C. assisting the partners and associates in all areas as needed. Denise joined Neil and Lara's firm in 2007 when it was Katz, Bernstein and Katz, LLP. Denise's 11 years of experience with Neil and Lara enabled her to be an integral part in the formation of KSC in 2017.



Outside of her work life, she enjoys spending time with her husband and two boys. She can often be found on the baseball field watching her boys compete, exploring wineries, trying new restaurants and traveling as much as possible. Denise once took a cruise to Bermuda which is currently one of her favorite destinations and in the future she hopes to visit family in Argentina.

Winter Donation Drive

Our Winter Donation Drive to benefit the EAC Network's **Children's Center** at the Cohalan Court Complex has ended and we would like to extend a very big **THANK YOU** to everyone that helped make this event a success! Your participation helped us collect a generous amount of Hats, Gloves and Scarves for Long Island Children as well as over \$500.00 to benefit the Children's Center. We were excited to visit the Center on Friday and see that this organization truly has their hearts in it for the kids, and it shows.



2018 Filing Season Issues

We understand that recent changes to the tax rules may make the 2018 filing season more challenging. The attorneys at Katz, Smith & Chwat, P.C. are always available to assist tax professionals and their clients to provide an understanding of the complex new rules.



For further assistance you can contact our office at: (631) 683-8700

Katz Tax Seminars Registration



The FINAL (Regulatory) Word on the Qualified Business Income Deduction

The Treasury Department recently issued the Final Regulations related to the Qualified Business Income Deduction which contain some important changes and clarifications from the previously issued Proposed Regulations. Before finalizing any of your clients' 2018 entity or personal income tax returns it is important to familiarize yourself with the final rules. At this seminar Neil will break down the statute and the regulations and answer any questions that may still be troubling you.

We are offering two sessions, a morning and an afternoon, to accommodate your schedules

March 4, 2019

Session 1

8:30 a.m. - 11:00 a.m.

Session 2

3:30 p.m. - 6:00 p.m.

[Register Here](#)

Course Price: \$199.00
Credits: 2.5

