

NUMBERS

*A Roundup of
Business and Tax
Planning Ideas*

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MKLLP.com is New and Improved

2007 Marcum & Kliegman Workplace Challenge Was a Tremendous Success!

THE 2007 Marcum & Kliegman Workplace Challenge, Long Island's largest participatory sporting event, took place at Jones Beach State Park on July 31. The Workplace Challenge is a major annual event where the CEOs and leaders of leading Long Island companies, their employees, and their families gather to compete in a 3.5 mile run/walk along scenic Bay Parkway at Jones Beach State Park, followed by *Long Island's largest office picnic*.

This year's Workplace Challenge had more than 6,800 runners from approximately 200 different companies. All proceeds from the race benefited *Long Island Children's Museum* and *Children's Medical Fund of New York*. Best-selling author, and pro-wrestling legend, Mick Foley

served as our special guest celebrity. Killer Joe & the Lido Soul Revue provided music throughout the evening, and In-A-Chord Quartet sang the National Anthem prior to the start of the race.

In 2006, Marcum & Kliegman took on the role of lead sponsor. "We are dedicated to keeping the camaraderie and the spirit of doing business together on Long Island," states Ronald Storch, Partner-in-charge of Marcum & Kliegman's Long Island operations. "We take great pride in sponsoring the Workplace Challenge, and to have a tremendous event like this for a real cause makes it that much more powerful."

Awards were presented for the fastest Workplace Teams, Fastest Senior Executives

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2007 Marcum & Kliegman Workplace Challenge Was a Tremendous Success! *(continued)*

(Top Dog), Top Male & Female Finishers, Best T-Shirts, Fastest Law Firms, Company with the Largest Number of Participants and Best “Spirit of the Race.” However, most organizations and their employees were simply there for fun, exercise, solidarity, and post-race picnic festivities.

Other official sponsors of the event included On Target Impressions, ADP, North Fork Bank, Hub International, Telephonics, LIBN, LI Pulse, and Runner’s Edge. The event was coordinated and administered by The Greater Long Island Running Club. Marcum & Kliegman LLP will sponsor the 2008 M&K Workplace Challenge on July 29, 2008. For information on how your company can participate, contact Mindy Davidson at (516) 349-7649 or visit mkworkplacechallenge.com.



*Mick Foley and
Managing Partner
Jeffrey M. Weiner*



*In-A-Chord Quartet sang the
National Anthem at the
2007 M&K Workplace Challenge*



*Partner Ronald Storch is
interviewed for Cablevision’s
Neighborhood Journal*



Mick Foley and Killer Joe


Children’s Medical Fund and Long Island Children’s Museum

PROCEEDS FROM this year’s Marcum & Kliegman Workplace Challenge will go to Children’s Medical Fund of New York and Long Island Children’s Museum.

Children’s Medical Fund of New York (CMF) is a nonprofit organization that provides program enhancements, technology acquisitions, and child-centered support to Schneider Children’s Hospital. CMF was established in 1966 by visionaries, who thought the region needed a children’s hospital. Some of these mothers and fathers had seriously ill children who had to travel out of the metropolitan area for treatment. CMF continues to be the

largest contributor to Schneider Children’s Hospital, which finally opened in 1983, and now is part of the North Shore-Long Island Jewish Health System—an 18-hospital system that is the nation’s third largest. The Fund’s efforts advance medical care, increase research capability, support educational information, and improve the quality of life for their young patients.

Long Island Children’s Museum (LICM), a not-for-profit institution chartered by the New York State Board of Regents, is a learning laboratory where hands-on exhibits invite visitors to experiment,

examine, and play. Through lively interdisciplinary activities, children and adults can share in the excitement of the learning process as they explore the world in which we live. Some of their main goals are to foster children’s creative thinking, problem-solving skills, socially responsible values, self-confidence, and self-esteem. The Museum helps enhance the ability of adults to understand and guide children’s growth with innovative exhibits, performances, and programs. LICM provides opportunities for children and families from diverse backgrounds to learn together in a safe, nurturing, inclusive, and stimulating environment. 

M&K Introduces New Partner Zafar Bin Basher


MARCUM & KLIEGMAN LLP, Certified Public Accountants and Consultants, is pleased to announce that Zafar Bin Basher, CPA/ABV, MBA has joined the Firm as Partner in Charge of Business Valuation for Marcum & Kliegman. Mr. Bin Basher has a diversified background in accounting, auditing, tax, and business valuation. Prior to joining Marcum & Kliegman, he was a Partner in a regional accounting firm and a Senior Manager in the Litigation Consulting and Bankruptcy Services Department of another large regional public accounting firm. He has also taught accounting courses as an adjunct professor at various colleges in Charleston, South Carolina.

Zafar has performed numerous valuation engagements involving closely-held businesses. He has undertaken these valuation engagements for various purposes, including corporate restructuring, tax redemptions, mergers and acquisitions, buy/sell agreements, shareholder disputes, matrimonial actions, estate planning, employee stock ownership plans, and economic damages. He also has been retained as a valuation expert by several prominent law



Zafar Bin Basher

firms in New York, and he has testified in Supreme Court in New York and in the County Court System in South Carolina.

Mr. Bin Basher holds an M.B.A. from The Citadel. He is also Accredited in Business Valuation (ABV) by the American Institute of Certified Public Accountants. In addition, he has fulfilled the educational and practice requirements for the designation of Accredited Senior Appraiser awarded by the American Society of Appraisers. 

Promotions

Marcum & Kliegman LLP is pleased to announce the following promotions effective July 1, 2007:

LI ACCOUNTING SERVICES

David Oksenhorn • Senior
Doli Taveras • Supervisor
Janet Fella • Manager

LI AUDIT

Danny Kim • Senior
Jennifer Lamberti • Senior
Leeanne Lofffield • Senior
John Murphy • Senior
Brad Russo • Senior
Rich McMullen • Supervisor
James Meehan • Supervisor
John Milito • Supervisor
Michele Valenti • Manager

LI HEDGE FUND

Lijie Liu • Supervisor
Arzo Reshad • Supervisor
Lori Sarnataro • Supervisor

LI TAX

Cathleen Quinn • Senior
Bianca Santiago • Rosa • Senior
Maggie Sun • Senior
Lyle Kotler • Supervisor
Kelly Lessler • Supervisor
Eli Bromberg • Manager
Nicoletta Del Re • Manager
Marla Esan • Senior Manager

NYC ACCOUNTING SERVICES

Tiffany Chen • Senior
Chandra Banarsi • Supervisor

NYC HEDGE FUND

Andrew Park • Senior
Andrea DiLauro • Supervisor
Kevin Poon • Manager

NYC TAX

Kelly Pang • Senior
Hugh Lee • Supervisor

Shintaro Takata • Supervisor
Dennis Zinkevich • Manager
Monte Colbert • Senior Manager

NYC AUDIT

Precilla Alcantara • Senior
Lindsay Cooper • Senior
Sarah Ebbert • Senior
Janet Levy • Senior
Chris Mooney • Senior
Katherine Zheng • Senior
Joanna Maliszewska • Supervisor
Tomer Pinchas • Supervisor
Linda Zhang • Supervisor
Sunil Jain • Manager
Avi Oz • Manager
Robert Radovich • Manager
Anthony Smith • Manager
Mike Vartanian • Manager
Anson Augustine • Senior Manager
John Klenner • Senior Manager

Inside Marcum & Kliegman LLP

Professional Accomplishments and Events

Partner **James Ashe** was a featured speaker on a webcast for Barker & Hostetler LLP about significant litigation risks for the private investment community in June.



James Ashe

Director of Marketing **Saskia Monteiro Thomson** has been elected to the Board of Directors of the Long Island chapter of the International Association of Business Communicators (IABC). The local IABC chapter offers corporate and business communication executives professional development and networking opportunities every month.



Saskia Monteiro Thomson

The Firm Would Like to Welcome...

Jennifer Anzelone, Supervisor, LI Accounting Services Dept.

Dwayne Barrett, Supervisor, LI Audit Dept.

Zafar Bin Basher, Partner, LI Litigation Dept.

Ana Brice, Benefits Supervisor, LI Human Resources Dept.

Elaine Cheung, Senior Accountant, NYC Audit Dept.

Leonor Cruz, Administrator, LI Word Processing Dept.

Louis Frenkel, Senior, LI Audit Dept.

Ana Laureano, Supervisor, LI Tax Dept.

AnneMarie Ludwig, Sales Associate, MK-INSS

Christi McGahy, Administrator, LI Administration Dept.

Manuel Montenegro, Staff Accountant, NYC Hedge Fund Dept.

Noemi Nunez, Staff, NYC Accounting Services Dept.

Fara Pellerito, Administrator, LI Administration Dept.

Doug Prince, Manager, LI Tax Dept.

Peter Scavuzzo, Director of Information Technology, LI IT Dept.

Patricia Taylor, Manager, NYC Audit Dept.

Shakeena Walker, Staff Accountant, NYC Hedge Fund Dept.

Susan Weiner, Administrator, LI Administration Dept.

Courtney Wright, Receptionist, LI Administration Dept.

Paula Zizzadoro, Human Resources Assistant, LI Human Resources Dept.

Baby News

Congratulations to Joel & **Carijn Michel** on the birth of their daughter... to Olga Berger & **Dennis Zinkevich** on the birth of their daughter... and to Eugenio & **Bianca Rosa** on the birth of their daughter.



Karen Kehl Rose, President of the Leading Edge Alliance, with M&K Managing Partner **Jeffrey M. Weiner** at the Firm's annual management retreat.

M&K InterNetworking Security Services LLC hosts Symantec Solutions Tour

M&K InterNetworking Security Services LLC (M&K-INSS), a wholly-owned subsidiary of Marcum & Kliegman LLP, played host to the Symantec Solutions Tour in May. Symantec, the largest reseller of computer security products in the world, invited the public to participate in several live product demonstrations and training sessions in their traveling luxury bus.



Symantec offered an exciting and unique opportunity to network one-on-one with their training representatives. Some major programs that were showcased include data center management, enterprise security, information risk management, and windows solutions. M&K-INSS team members greeted attendees and provided light refreshments in their hospitality tent alongside Symantec's bus. Based on individual needs, M&K-INSS provided tours of its facility.


Marcum & Kliegman's Happiness Committee Offers Unique Employee Benefits

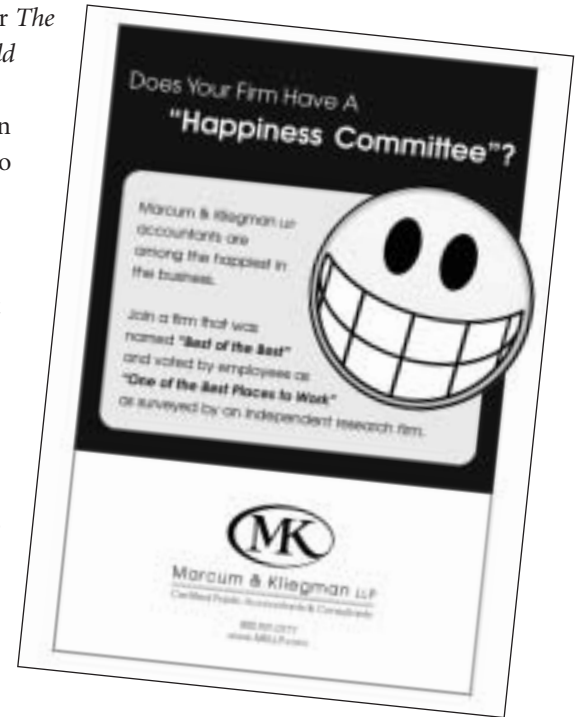
MARCUM & KLIEGMAN LLP, named one of Long Island's Best Places To Work in 2006, continues to cultivate a positive work environment with help from the Firm's "Happiness Committee." This Committee is dedicated to fostering high employee morale. "Marcum & Kliegman is a fun place to work," comments Richard Paris, Director of Human Resources. "We believe that our employees should not only be rewarded and recognized, but enjoy coming to work. We hope that the Happiness Committee can contribute to that."

Marcum & Kliegman's Happiness Committee manages an annual budget to give out gifts and organize events that brighten the workday. Early in the year, the Committee arranged several initiatives including sporting event ticket giveaways, pizza day, and an ice cream social. Recently

the Happiness Committee put together *The First Annual M&K No-Limit Texas Hold 'Em Tournament*.


The Committee takes great pride in creating opportunities for employees to work as a team in an atmosphere that nurtures trust among co-workers and leaders. Partners, managers, and staff from various departments throughout the Firm are members of the Committee.

While the Firm has traditionally provided perks to its employees, the Happiness Committee formalized these efforts last year, dispensing perks on a more regular basis, which has helped keep high morale a constant. Employee surveys reveal that specific Committee activities have gotten a positive response. 



Marcum & Kliegman LLP Business Hero Advertisement Showcased in Times Square

MARCUM & KLIEGMAN LLP was featured on the video screen in Times Square on Monday, July 9 and Tuesday, July 10. In a contest sponsored by Dell, M&K was one of the few businesses chosen to appear on their billboard in the heart of New York City. There was a live Times Square webcam and an interactive gallery of all winning small business ads on Dell's website. An image of the ad appearing on the Times Square billboard is currently up in the What's Hot section of M&K's website at MKLLP.com.

The featured advertisement was part of the award-winning M&K Business Hero campaign. Marcum & Kliegman does not use an outside advertising agency for the development of its corporate image or advertising materials. Saskia Thomson, Director of Marketing for Marcum & Kliegman, and designer of the ad states, "Niche marketing is telling your audience only those messages that are specifically relevant to their interests or concerns. By addressing people in a way that is meaningful to them, you have a better chance of getting your message through the clutter." 




Spotlight

Marcum & Kliegman LLP to Acquire CBIZ/Mayer Hoffman McCann in New York City

MARCUM & KLIEGMAN LLP has signed a letter of intent to acquire the CBIZ/Mayer Hoffman McCann accounting and tax practice in New York City. "This will be a good tuck-in acquisition," states Marcum & Kliegman Managing Partner Jeffrey Weiner. "CBIZ deals with a lot of high-net-worth individuals, has a solid trust and estate practice, and has a good non-public company attest practice."

CBIZ is one of the nation's leading providers of business services. From accounting and tax to benefits and insurance, to a wide range of consulting

services, they offer national caliber business solutions. CBIZ is one of the nation's top ranked benefits specialists in addition to being one of the largest accounting service providers, business insurance firms, valuation and medical practice management companies in the U.S.

If the deal wins corporate approval, M&K will add 17 professionals, including Jeffrey Saltzer and Stan Lassar as partners, and \$3.5 million revenue. Overall, the Firm would have 400+ staff, including 40 partners, \$100 million revenue. 

MKLLP.com is New and Improved

MARCUM & KLIEGMAN LLP, Certified Public Accountants and Consultants, is pleased to announce that the Firm has just launched a brand new website at MKLLP.com. The new website, featuring a contemporary design, was built to enhance the Firm's brand, create a streamlined call to action, and offer a dynamic interactive experience for visitors.

A major feature on the site comes in the form of timely content. The Weekly News area contains articles that focus on

industry-relevant topics. Tax planning and ideas and business tips are posted on the main page every day. Twice-monthly audio interviews also add another exciting element to the new site. Users are invited to sign up for free subscrip-

tions to the news, podcasts, and today's tip RSS feeds so that the updates can appear on their own browser dashboard. Finding specific pages for each individual service and practice area that M&K offers is now simple, with the new navigation, and the site search engine makes it much easier for visitors to find specific information.

The rebuilt and re-launched website is yet another phase of Marcum & Kliegman's expansion and evolution. 



THE PARTNERS AND MANAGERS of Marcum & Kliegman LLP are often asked if they are available to serve additional clients. As a dynamic and growing firm, we sincerely appreciate your referrals. If you would like a copy of *Beyond the Numbers* sent to a friend, please email us at info@mkllp.com or complete and mail this form to: Marketing Department, Marcum & Kliegman LLP, 10 Melville Park Road, Melville, NY 11747.

NAME _____
ADDRESS _____

BEYOND *the* NUMBERS

Beyond the Numbers is published six times per year by Marcum & Kliegman LLP for its clients and friends. Founded in 1951, Marcum & Kliegman LLP is a full-service accounting and consulting firm serving the needs of its clients by providing expert assistance in strategic business planning, financial management, tax planning and compliance, succession and estate planning, litigation support services, computer hardware and software consulting, and sales tax recovery services.

Marcum & Kliegman LLP is a member of The Leading Edge Alliance, an international group of accounting firms that provides the firm with affiliates in most major U.S. cities and in foreign countries throughout Europe, the Far East, the Pacific Rim and South America. The firm has been recognized as one of the top 50 accounting firms in the country by *CPA Digest* and recognized for excellence in client service by *Accounting Today*.

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