



SKILLED • RELIABLE • TRUSTED

**HOLTZ RUBENSTEIN**

*adviser*



## INDEX FOR 2001

It has been our pleasure to provide you with additional financial information in our newsletters over the past year. Below is a listing of the topics we covered throughout the year. If you want further information, please call Marketing Director Flo Federman at (631) 752-7400 Ext. 212.

### January, 2001

- Payroll Tax Memorandum - 2001
- Notable and Quotable
- Installment Tax Correction Act of 2000
- Attention Household Employers
- You Like Us, You Really Like Us!
- CyberNotes - Gist.com
- Get On Track With a Financial Plan
- *The Adviser Corner*: Emerging Business Focus - Family Business Survival
- How Can We Help You in 2001?
- Marketing YOUR Business: Get Help By Asking Your Customers

### February, 2001

- Notable and Quotable
- Proposed Regulations Simplify Retirement Plan Minimum Distribution Rules
- Best of the Best
- Benefits Provided to Taxpayers With Foreign Activities
- CyberNotes –timeanddate.com
- New Capital Gains Tax Rate
- *The Adviser Corner*: Reinforcing Your Company for the 21<sup>st</sup> Century
- Do Not Call!
- New York State Adopts Credit Card Tax Payment Program

### March, 2001

- Notable and Quotable
- Attention Mileage Fanatics!
- Residential Fuel Oil Storage Tank Credit Introduced
- Marketing: Focus on Your Business
- CyberNotes –LibrarySpot.com
- *The Adviser Corner*: Internet Access - Is Speed Worth the Price?
- Roth IRA Conversion Can Be Undone
- Ease the Burden of Higher Education Bills
- DFK International

### April, 2001

- Notable and Quotable
- Beatrix McKane Named Among Top 50 Women
- Charitable Deduction by an S-Corporation
- Passport Renewal
- Big Changes for Small Retirement Plans
- CyberNotes –wolinskyweb.com
- IRS Allows Advance Distribution of Transit Passes
- *The Adviser Corner*: When Is a Sale Really a Sale?
- “Say Something in Italian!”
- A-B-C-D-E-F-G-H Stamps
- DFK Website of the Month - [www.dfkusa.com](http://www.dfkusa.com)

### May, 2001

- Notable and Quotable
- Materialmen “Pay When Paid” Method –Deadline June 1!
- Information Reporting Requirements for Stock Options
- IRS Changes Position For Contractors - Cash/Accrual Issue
- Non-Profit Symposium June 28
- *The Adviser Corner*- Saving for College Tuition: A Look at State Tuition Programs
- Update: Industrial & Manufacturing Business Credit
- DFK Website of the Month - [www.pspmuc.de](http://www.pspmuc.de).
- *HR Adviser* Wants YOUR Opinion

### June, 2001

- Notable and Quotable
- Holtz Rubenstein Huntington Business of the Year Award
- Suffolk Sales Tax Increase - Contractors Entitled to Credit
- Holtz Rubenstein Scholarships to Hofstra Students
- CyberNotes –Fodors.com
- Q&A: Mortgage Interest Expense Deduction
- *The Adviser Corner*: Donating to Charity - Alternatives to Cash
- Bequeathing Frequent Flyer Miles
- IRS Grants Tax Relief to Certain Taxpayers Claiming Refunds on Delinquent Tax Returns
- Mum’s The Word! - Federal Privacy Disclosure Rules
- DFK Website of the Month - [www.hrcpa.com](http://www.hrcpa.com)
- Special Insert on New Tax Law

## **INDEX FOR 2001 HOLTZ RUBENSTEIN ADVISER**

### **July, 2001**

- Notable and Quotable
- The Check is (Almost) in the Mail
- CyberNotes –Virus Hoaxes
- New York State Sales Tax: Charges for Travel Expenses
- New Federal Tax Withholding Tables
- IRS to Initiate K-1 Matching Program
- *The Adviser Corner*: The State of Manufacturing on Long Island
- OOPS! Tax Forms and Checks Missing from IRS Pittsburgh PO Box
- IRS Fixes Glitch in Reversal of Installment Sale Rule
- New Jersey Corporation Income Tax on Large S Corporations to be Phased Out
- DFK Website of the Month - [www.cvdfk.com](http://www.cvdfk.com)

### **August, 2001**

- Notable and Quotable
- “Who’s Who In Accounting” on Long Island
- Intermediate Sanctions Against Not-for-Profit Management
- Additional Retirement Plan Provisions of the 2001 Tax Act
- CyberNotes –Livemanuals.com
- *The Adviser Corner*: Tax Advantages of Buying a Home
- Save The Date: Annual Not-For-Profit Fiscal Workshop
- No Ownership Means No Capital Gains Tax
- DFK Website of the Month - [www.pp.ij4u.or.jp/~katosabu](http://www.pp.ij4u.or.jp/~katosabu)

### **September, 2001**

- Notable and Quotable
- Roth IRA Conversions Can Be Undone
- Work-Related Education
- Capital Gains Election and Your 2001 Tax Return
- CyberNotes –IRS.gov
- *The Adviser Corner*: A Primer on Family Limited Partnerships
- Tax Amnesty Programs
- Estate Tax Changes
- DFK Website of the Month - [www.dfk.ch](http://www.dfk.ch)

### **October, 2001**

- Notable and Quotable
- September 11, 2001
- Tax Filing and Payment Relief Following Terrorist Attacks
- Insurance Policy Review for Landlords and Tenants
- CyberNotes –Libertyunites.org
- Backup...Backup...Backup!
- *The Adviser Corner*: Strategies for Surviving a Cash Flow Crisis
- Stars and Stripes
- Disaster Loss Relief from the IRS
- REMINDER: Charitable Receipts
- Thank You DFK International Members
- Holtz Rubenstein’s Newest Partner - Andrew J. Vuono
- Flag Etiquette
- DFK Website of the Month - [www.sjaccounting.com](http://www.sjaccounting.com)

### **November, 2001**

- Notable and Quotable
- Year-End Tax Strategy- Investment Timing Decisions
- Tax Filing and Payment Relief Following Terrorist Attacks
- Deductible Expenses for Your Business
- CyberNotes –Online Shopping
- Holtz Rubenstein Becomes Its Own Landlord
- Mid-Quarter Convention Depreciation Relief
- *The Adviser Corner*: Answering the “How To” Questions about Employee Benefits
- Tax Trap - Year-End Purchase of Mutual Funds
- It’s Time to Turn in Your Foreign Currency
- DFK Website of the Month - [www.kmss.ca](http://www.kmss.ca)

### **December, 2001**

- Notable and Quotable
- Qualified Retirement Plan Amendment Deadlines
- Social Security Update
- CyberNotes –Savings Bonds
- Windows 95 Is Retiring
- Additional Relief from Application of Mid-Quarter Convention Depreciation Rules
- *The Adviser Corner*: Beware of Wash Sales of Stocks or Securities
- Form 1099-MISC Filers – Don’t Forget Phone Number!
- Tax Test: Do You Need to Pay Self-Employment Tax?
- DFK Website of the Month - [www.bennett-thrasher.com](http://www.bennett-thrasher.com)