

**STATEWIDE PROGRAM PLANNING CO-CHAIRS**



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Anthony J. Enea, Esq. is the managing member of Enea, Scanlan & Sirignano, LLP with offices in White Plains and Somers, New York. For approximately thirty (30) years, Mr. Enea has devoted his practice to educating and protecting the rights of seniors, the disabled and their families from the costs of long term care.

Mr. Enea and his firm concentrate their practice on Elder Law, Asset Protecting Planning, Medicaid Applications (Nursing Home and Home Care), Guardianships (contested/non-contested), Wills, Trusts and Estates, Estate Litigation and Nursing Home Negligence.

He is the author of hundreds of published articles and a frequent lecturer to seniors, the disabled, attorneys, CPA's and financial advisors, with respect to the planning options available to seniors and their rights. For decades these articles have been published in such publications as "Generations", "60 Plus", the Westchester County Business Journal, Westchester County Bar Newsletter and numerous New York State Bar Association publications.

Mr. Enea is Certified as an Elder Law Attorney by the National Elder Law Foundation as accredited by the American Bar Association. \*He is a former member of the Executive Committee of the Trusts and Estates Section of the New York State Bar Association as a Vice-Chair of the Committee on the Elderly and Disabled.

Mr. Enea is the Past Chair of the Elder Law Section of the New York State Bar Association.

Mr. Enea is a Past President and a Founding Member of the New York Chapter of the National Academy of Elder Law Attorneys (NAELA). He is also a member of the Council of Advanced Practitioners of NAELA.

Mr. Enea is a Past President of the Westchester County Bar Association.

Mr. Enea is the President of the Westchester County Bar Foundation.

Mr. Enea is a Vice President of the Columbian Lawyers Association of Westchester County.

Mr. Enea is the recipient of the "Above the Bar Award" as the Leading Eldercare attorney in Westchester County. This award is presented by the Westchester County Bar Association, Pace Law School, the Westchester Women's Bar Association, the Westchester County Business Journal and the firm of Citrin Cooperman.

Mr. Enea has been selected as a Super Lawyer for the eighth consecutive year and for 2009, 2010, 2013 and 2014 was selected as a Top 25 Super Lawyer in Westchester County.

Mr. Enea for the third consecutive year has also been selected for inclusion in the "Best Lawyers in America" as an Elder Law Attorney. For the year 2015, he is the recipient of the award as "Lawyer of the Year" for 2015 in Trusts and Estates for White Plains.

Mr. Enea is an "AV" Rated Preeminent Attorney as rated by Martindale-Hubbell.

Mr. Enea is also fluent in Italian.



**FRANCES M. PANTALEO, ESQ.**  
**BLEAKLEY PLATT & SCHMIDT LLP**  
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Frances M. Pantaleo is a partner at Bleakley Platt & Schmidt LLP, handling a broad range of matters with a particular emphasis in the areas of elder law, estate planning, drafting wills and trusts, probate and administration of estates, guardianship proceedings under Article 81 of the Mental Hygiene Law and Article 17A of the Surrogate's Court Procedure Act, and drafting and administration of supplemental needs trusts. Ms. Pantaleo has received an AV rating from the Martindale-Hubbell peer review, the highest rating available, for her legal skills and ethical standards.

Ms. Pantaleo is the immediate Past-Chair of the Elder Law and Special Needs Section of the New York State Bar Association and a member of the National Academy of Elder Law Attorneys. She has previously served as Chair of the Elder Law Committees of the Westchester Women's Bar Association and the Westchester County Bar Association.

Ms. Pantaleo received her J.D. from New York University Law School in 1979 and is a *summa cum laude* graduate of Brooklyn College, CUNY. Ms. Pantaleo has been recognized as a "Super Lawyer" in the area of Elder Law and was named one of the top twenty-five attorneys in Westchester County in both 2011 and 2012. In 2007, Ms. Pantaleo received a Partner in Justice Award in recognition of her outstanding pro bono assistance to Legal Services of the Hudson Valley. Ms. Pantaleo serves on the Board of the Hudson Valley/Rockland/Westchester Chapter of the Alzheimer's Association. She is a frequent lecturer on elder law and special needs planning for professional education programs for attorneys and financial professionals and to community organizations such as The Alzheimer's Association, AARP, UJA-Federation, The Pace Women's Justice Center, Westchester ARC and Senior Law Day programs offered by Westchester County Department of Senior Services and programs.



**COURSEBOOK AUTHORS**  
**BIOGRAPHIES**







**VALERIE J. BOGART**

**Director, Evelyn Frank Legal Resources Program  
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Valerie Bogart has been Director of the Evelyn Frank Legal Resources Program (EFLRP) since June 2002. Originally founded by Selfhelp Community Services, Inc., the Evelyn Frank program moved to the New York Legal Assistance Group in April 2013, where Valerie continues to serve as EFLRP's Director. EFLRP advocates for access to long-term care and other health care for low-income seniors and people with disabilities through direct legal representation, policy advocacy, legal education, and its website <http://NYHealthAccess.org>. Earlier, Valerie was an attorney for the Legal Aid Society Brooklyn Office for the Aging, Legal Services for the Elderly in Manhattan, and the Legal Aid Society in Minneapolis, where she was a Reginald Heber Smith Fellow. A graduate of the New York University School of Law, she lectures extensively for bar and social services organizations, has taught adjunct courses at CUNY and Fordham law schools, and has received numerous awards, including the Lawyers who Lead by Example Award from the New York Law Journal (2012), the Felix A. Fishman Award for Extraordinary Advocacy from New York Lawyers for the Public Interest (2011), the President's Award from the National Academy of Elder Law Attorneys (2010) and the Access to Justice Award of Project FAIR (2010). She is Co-Chair of the Medicaid Committee of the New York State Bar Association Elder Law Section.

## **BIOGRAPHY OF ROBERT M. FREEDMAN**

Robert M. Freedman is a partner at Schiff Hardin LLP in New York City. He focuses his practice on elder law, special needs planning, and trusts and estates. Mr. Freedman is nationally recognized authority and pioneer in the field of elder law. He has more than 30 years of experience assisting multigenerational families with planning for their current and future needs related to: Long-term care planning, Medicaid eligibility, Medicare, Guardianship, Tax planning and Estate administration. Mr. Freedman's focus on elder law began in law school, and in 1985, he founded one of the nation's first elder law firms. He is a founder of both the National Academy of Elder Law Attorneys (NAELA) and the Elder Law and Special Needs Section of the New York State Bar Association.

Mr. Freedman represents individuals with disabilities and mental illness and their families. His legal experience and his knowledge of available services for individuals with disabilities allow him to provide practical, thoughtful estate planning for his clients and their loved ones.



**Aaron D. Frishman**  
Associate  
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**Practice**  
Trust and Estate

**Education**  
George Mason University  
School of Law (J.D., 2005)  
Hobart and William Smith  
Colleges (B.A., *magna cum*  
*laude*, 2000)

**Bar/Court Admissions**  
New York  
Colorado

## Aaron D. Frishman

Aaron practices in all areas of trusts and estates and elder law matters. He focuses his work in the areas of estate and tax planning, trusts, guardianships, estate and trust administration, Medicaid planning, and other elder law and public benefits matters. In addition to this focus, Aaron frequently provides legal assistance to personal injury attorneys pertaining to the protection of settlement proceeds.

Aaron has lectured to individuals and at state bar associations on numerous estate planning and elder law issues and has been published nationally by the National Academy of Elder Law Attorneys (NAELA). He recently became a member of the Public Benefits Panel of the NYSBA Elder Law Section.

### Honors and Affiliations

- New York State Bar Association, Trust and Estate Section; Elder Law Section
- Colorado Bar Association, Trust and Estate and Elder Law Section
- Onondaga County Bar Association, Volunteer Lawyers Project – Surrogate’s Court Legal Clinic Volunteer, 2013-Present; Volunteer Lawyers Project – Upstate Medical Center Legal Clinic Volunteer, 2014-Present
- National Academy of Elder Law Attorneys
- Phi Beta Kappa

### Representative Presentations

- “Drafting Supplemental and Special Needs Trusts,” NYSBA CLE: Advanced Document Drafting for the Elder Law Attorney, Moderator and Chair, Syracuse, NY, November 2013
- “Settling Personal Injury Actions: Structured Settlements, Settlement of Medicare and Medicaid Claims, the Medical Indemnity Fund for Neurologically Impaired Infants,” New York State Bar Association, Elder Law Section, Fall Meeting, October 2013
- “Special Needs Event,” Menorah Park, Syracuse, NY, August 2013
- “Advanced Directives,” Elder Law Fair, Syracuse, NY, May 2013
- “Basics of Elder Law Practice,” New York State Bar Association, Elder Law Section, Syracuse, NY, May 2013
- “Elder Law: Basics of Elder Law A-Z,” Law Review Seminar, Denver, CO, July 2012
- “Medicare Subrogation Rights in Personal Injury Settlements,” Colorado Bar Association, Denver, CO, 2007

### Representative Publications

- Frishman, Medicare Set-Asides in Personal Injury Cases: Is There a Standard Method of Practice?, NAELA Journal, Volume 8, No. 2, 2012

### Other Activities

- 2014 Syracuse “40 Under Forty” Award Winner
- Steering Committee Member, F.O.C.U.S. Greater Syracuse Age-Friendly, 2014-Present
- Jewish Federation of Syracuse Young Leadership Program, 2014-2015
- Committee Member, YMCA Camp Cory Alumni, 2013-Present
- Volunteer Member, Finance Committee, Alzheimer’s Association, Central New York Chapter, Sept. 2014-Present
- Member/Congregant, Temple Concord
- Partner/Volunteer, Social Venture Partners Denver, 2007-2010

**Sara Meyers, Esq.**  
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Ms. Meyers is a Partner at the firm of Enea, Scanlan & Sirignano, LLP, and concentrates her practice on Elder Law, Estate Planning, Special Needs Planning, Guardianships, and long term care planning strategies, with a focus on Medicaid home care and nursing home.

Prior to joining Enea, Scanlan & Sirignano, Ms. Meyers was the staff attorney at the Sadin Institute on Law of the Brookdale Center on Aging of Hunter College. She concentrated on Medicaid, home care, and the Medicare Part D prescription drug program. She created materials and conducted training seminars for social service providers, attorneys, and social workers on topics including Elder Law, Medicaid, Medicare, home care, and Administrative Appeals.

Ms. Meyers has authored "Medicaid Managed Long Term Care is Coming to Westchester. Are You and Your Clients Ready?," Westchester County Bar Newsletter, January 2013; "Guardianships and Supplemental Needs Trusts (SNT) as planning tools for Parents of Adult Disabled Children," New York State Bar Association Elder Law and Special Needs Journal, Winter 2012; "An Overview of Medicaid Home Care Options for Seniors," New York State Bar Association Elder Law Attorney, Winter 2010; "Utilizing Medicaid Home Care as a Solution in a Post-DRA World," New York State Bar Association Elder Law Attorney, Summer 2007 and Westchester County Bar Newsletter, June 2007. Ms. Meyers coauthored with Anthony J. Enea "The Doors Open Further for the Nursing Home without Walls Program," Westchester County Bar Newsletter, November 2007.

Ms. Meyers is a frequent lecturer for Elder Law Programs sponsored by the New York State and Westchester County Bar Associations.

She is a member of the New York State Bar Association, the Elder Law (Executive Committee; Editor, Elder Law and Special Needs Journal) and Trust and Estates Sections, and a member of the Westchester County Bar Association (immediate past Co-Chair of the Elder Law Committee) and is an editor of the Westchester County Bar Journal.

Ms. Meyers has a B.A. in History, cum laude, from Brandeis University and a J.D. from the Cardozo School of Law. She is also a volunteer attorney for Legal Services of the Hudson Valley. She is a Trustee of the Board of Directors of the Westchester Day School in Mamaroneck, New York.



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Frances M. Pantaleo is a partner at Bleakley Platt & Schmidt LLP, handling a broad range of matters with a particular emphasis in the areas of elder law, estate planning, drafting wills and trusts, probate and administration of estates, guardianship proceedings under Article 81 of the Mental Hygiene Law and Article 17A of the Surrogate's Court Procedure Act, and drafting and administration of supplemental needs trusts. Ms. Pantaleo has received an AV rating from the Martindale-Hubbell peer review, the highest rating available, for her legal skills and ethical standards.

Ms. Pantaleo is the immediate Past-Chair of the Elder Law and Special Needs Section of the New York State Bar Association and a member of the National Academy of Elder Law Attorneys. She has previously served as Chair of the Elder Law Committees of the Westchester Women's Bar Association and the Westchester County Bar Association.

Ms. Pantaleo received her J.D. from New York University Law School in 1979 and is a *summa cum laude* graduate of Brooklyn College, CUNY. Ms. Pantaleo has been recognized as a "Super Lawyer" in the area of Elder Law and was named one of the top twenty-five attorneys in Westchester County in both 2011 and 2012. In 2007, Ms. Pantaleo received a Partner in Justice Award in recognition of her outstanding pro bono assistance to Legal Services of the Hudson Valley. Ms. Pantaleo serves on the Board of the Hudson Valley/Rockland/Westchester Chapter of the Alzheimer's Association. She is a frequent lecturer on elder law and special needs planning for professional education programs for attorneys and financial professionals and to community organizations such as The Alzheimer's Association, AARP, UJA-Federation, The Pace Women's Justice Center, Westchester ARC and Senior Law Day programs offered by Westchester County Department of Senior Services and programs.

**KASSOFF, ROBERT & LERNER, LLP**

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**JOAN LENSKY ROBERT** is a member of KASSOFF, ROBERT & LERNER LLP, a law firm in Rockville Centre, New York practicing exclusively in the areas of elder law and disability law. Ms. Robert is a graduate of Skidmore College, where she was a member of Periclean, the Skidmore College Honor Society, the University of Pennsylvania, where she studied pursuant to a Ford Foundation Fellowship, and Touro College School of Law, summa cum laude, where she was the recipient of a Deans Fellowship and was valedictorian of the part time division. Prior to entering the practice of law, Ms. Robert taught French with the Valley Stream Central High School District.

Ms. Robert served as Chair of the New York State Bar Association Elder Law Section from 2003-2004 and served as Co-Chair of its Special Needs Planning Committee from 2006-2009. She served as Chair of its Mentorship Committee from 2010 – 2013 and is now Co-Chair of the Section's Mentoring program and of its Special Needs Planning Committee. She is a past member of the Committee of Persons with a Disability and of the Committee on Committees of the New York State Bar Association. She is an attorney member of the Guardianship Advisory Committee formed by the Office of Court Administration. She received a Lifetime Achievement Award from the New York State Elder Law and Special Needs Section in January, 2014. She has been named a Metropolitan New York Super Lawyer. Ms. Robert has been Board Certified as a Certified Elder Law Attorney (CELA) by the National Elder Law Foundation, approved as the sole Certifying Organization for Elder Law Attorneys by the American Bar Association.

A past member of the Board of Directors of the Nassau County Bar Association and a past chair of its Elder Law/Social Services/Health Advocacy Committee, Ms. Robert served as Dean of the Nassau Academy of Law. She served as a member of its nominating committee.

Ms. Robert is Past President of the New York Chapter of NAELA, the National Academy of Elder Law Attorneys and was a Co-Chair of the Special Needs Planning Summit sponsored by NAELA. She is a member of the Publications and Programs Task Force and is a member of the steering committee for the 2015 national NAELA ANNUAL CONFERENCE. Ms. Robert served as Co-Chair of the State Chapters Committee of NAELA. She received the NAELA award as outstanding member of the New York Chapter in 2012 and also received the Theresa Foundation Award for outstanding service and advocacy to persons with special needs, sponsored by NAELA.

Ms. Robert has been honored for outstanding service by the Long Island Alzheimer's Foundation, Project Real and the National Multiple Sclerosis Society.. She served on the Board of Editors of the Bill of Particulars, the

publication of the New York State Trial Lawyers Association, which honored her as outstanding downstate speaker. She has written numerous articles concerning the interrelationship between government entitlements and lawsuit recoveries. She co-wrote the chapter on Special Needs Planning in the book Guardianship Practice in New York State and wrote the chapters on Medicaid liens and planning in Personal Injury Actions in New York published by the New York State Bar Association. The author of numerous articles for community groups and professional groups concerning elder law and disability law, Ms. Robert has been a faculty member at various Bar Association programs concerning Elder Law, Supplemental Needs Trusts and asset preservation, and has been an instructor at certified training programs for Guardians, Supplemental Needs Trust Trustees and Court Evaluators. She is a past Editor in Chief of the New York Elder Law and Guardianship Newsletter.

Ms. Robert and her husband, Charles, are the proud parents of Heather Robert Coffman, Esq. and Jay Robert, Esq., an associate at Kassoff, Robert & Lerner, LLP. They are the doting grandparents of Naomi Coffman and Leo Coffman, residents of San Francisco.

## VINCENT J. RUSSO

Vincent J. Russo & Associates, P.C., Westbury

**VINCENT J. RUSSO**, Managing Shareholder of Vincent J. Russo & Associates, P.C., Long Island's Signature Elder Law, Special Needs and Estate Planning Law Firm with offices in Westbury, Islandia, Lido Beach and Manhattan, New York has championed the rights of seniors and people with special needs since 1985. Vincent is a Founding Member, Fellow and Fifth President of the **National Academy of Elder Law Attorneys (NAELA)** and is a Founding Member and First President of the New York Chapter of NAELA. He is the only NAELA member to receive the prestigious President's Award twice. He is also a member of the invitation only, NAELA Council of Advanced Practitioners (CAP). He is a Founding and current Chair of the **NAELA Foundation (NELF)** and the current Chair of the NELF Programs Committee. Vincent is a Founding Member and Past Chair of the **Elder Law Section of the New York State Bar Association (NYSBA)** and Co-Founder and Past Chair of the Board of **ElderCounsel, LLC**. Vincent is also a Member of the NYSBA Advocacy Committee on the Medicaid Budget. He is a Co-Founder of the **Academy of Special Needs Planners (ASNP)**, Past Board Member and current President of the **Guardianship Corporation of United Cerebral Palsy of Nassau County** and a Co-Founder of **Theresa Alessandra Russo Foundation** for children with special needs.

Vincent is the Founding Chair and current member of the Legal Advisory Committee of the **Alzheimer's Association Long Island Chapter** and a former Board Member of the **Arthritis Foundation Long Island Chapter** and **United Cerebral Palsy of Nassau County**.

His professional achievements include an invitation to join the **WHITE HOUSE 2005 Conference on Aging** as an at-large delegate. This invitation followed two other major events in Washington, D.C. as a representative of NAELA: (1) Testimony before the **UNITED STATES SENATE COMMITTEE ON AGING** on the proposed, detrimental changes in the Medicaid Program and (2) Featured Speaker at the Policy Forum of the **CATO INSTITUTE** on the subject of "Medicaid and the Long Term Care Crisis."

Joining a special group of New York attorneys, Mr. Russo is Co-Chair of the **New York State COMPACT Working Group**, introducing new and innovative long term care program which is being considered by the New York State Legislative.

As a national advocate for people with disabilities, seniors and their families, Mr. Russo has appeared on the **NBC's TODAY SHOW, WNBC NEWS, CBS SUNDAY MORNING, CNN, NEW YORK TIME FORUM, CNBC, the FOX NEWS NETWORK, CSPAN II, WCBSRADIO, TELECARE, NEWS 12 LONG ISLAND**, as well as numerous, other local radio and television programs. He created and co-hosts **Family Comes First** on cable TV, which won a Telly Award for the **Alzheimer's Impact on Family, The Henley Family Story**.



**EDWARD V. WILCENSKI, ESQ.**

**Wilcenski & Pleat, PLLC**

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EDWARD V. WILCENSKI, Esq., is a co-owner and co-manager of the law firm of Wilcenski & Pleat, PLLC, with offices in Clifton Park and Glens Falls, New York. He practices in the areas of Elder Law, Special Needs Planning, and Trust and Estate Planning.

Ed is a Trustee of the NYSARC (formerly the New York State Association for Retarded Children) Pooled Trust, and serves as a Trustee of the Wildwood Programs Pooled Trust, a trust program serving individuals with developmental and learning disabilities. In 2009 and again in 2013, he received the Marie Ivancich Memorial Award from the Brain Injury Association of New York State for professional commitment to the organization's mission of advocacy for individuals living with brain injuries.

His professional affiliations include membership in the National Academy of Elder Law Attorneys, and the New York State Bar Association's Elder Law and Trusts and Estates Sections. He is a member and former President of the Special Needs Alliance, [www.specialneedsalliance.org](http://www.specialneedsalliance.org), an invitation only, not for profit organization of leading disability attorneys who practice in the areas of Special Needs Trusts and public benefits.

Ed is a contributing author to various publications of the New York State Bar Association, including Representing People with Disabilities, and Planning for Incapacity, and Guardianship Practice in New York State. He lectures frequently to attorneys, agency staff and families on elder law, special needs trusts and other legal issues.

He is a graduate of Albany Law School, and received his Bachelor of Science in economics, magna cum laude, from Siena College in Loudonville, New York.



## **MELVILLE, L.I. FACULTY BIOGRAPHIES**



**Richard A. Weinblatt**

**Haley Weinblatt & Calcagni, LLP, Islandia**

Richard A. Weinblatt, a partner in the firm, concentrates in the areas of Elder Law, including Medicaid planning, representing clients before Departments of Social Services, and guardianship proceedings; estate planning and estate administration; and contested Surrogate's Court proceedings.

Richard received his undergraduate degree in accounting from New York Institute of Technology and a Master's degree in taxation from C.W. Post College. He received his law degree from St. John's University, from which he graduated magna cum laude and where he received numerous academic awards, which included the Prentice Hall Award in Taxation and American Jurisprudence Awards for excellence in Advanced Personal Income Tax and Gift and Estate Taxation. Upon graduation from law school, Richard entered private practice and joined our firm as a partner at its inception in 1994.

Richard is an adjunct professor of taxation law at Touro Law Center and is a frequent lecturer in the areas of Medicaid planning and trusts and estates for the New York State Bar Association and the Suffolk County Bar Association. Richard has also lectured on various Elder Law and estate-related topics for the Queens County and Nassau County Bar Associations, as well as for numerous community and religious organizations.

Richard has held offices in several professional organizations, including serving as President of the Suffolk County Chapter of the Long Island Estate Planning Council, District Delegate to the Elder Law Section of the NYS Bar Association, Associate Dean of the Suffolk Academy of Law, and Director of the Suffolk County Bar Association. He has chaired the Elder Law, Surrogate's Court and Tax Committees of the Suffolk County Bar Association. Richard has received an AV<sup>®\*</sup> rating from Martindale-Hubbell, its highest rating.

Richard is a member of both the National Association of Elder Law Attorneys and of its New York chapter. He is a Certified Public Accountant and served for many years both as trustee and as President of the Board of Education of the Smithtown School District.

## **Beth Polner Abrahams**

Attorney At Law  
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[Beth@BPAbrahamsLaw.com](mailto:Beth@BPAbrahamsLaw.com)

**Beth Polner Abrahams**, a 1981 graduate of Franklin Pierce Law Center in Concord, N.H (now, the University of New Hampshire School of Law), is an elder law, special needs, and estate and tax planning attorney. She is a trained mediator focusing on elder care, family, and guardianship disputes.

Ms. Polner Abrahams is a past chair of the Nassau County Bar Association's Elder Law Committee and is a member of the Suffolk County and New State Bar Associations. In 2009 Ms. Polner Abrahams was presented with an award from the NYS Bar Association's Elder Law Section recognizing her pro bono litigation to advance the rights of the elderly and persons with disabilities.

She serves as a member of the board of directors of the L.I. Center for Business and Professional Women, as incoming president of the advisory council for Nassau/Suffolk Law Services Committee, Inc., and sits on the board of directors for her community's senior center, Life Enrichment Senior Center at Oyster Bay.

**Frank L. Buquicchio, Esq.**

Vincent J. Russo & Associates, P.C., Islandia

Frank is a Partner with the law firm of Vincent J. Russo & Associates, P.C. of Westbury, Islandia, Lido Beach and Manhattan, New York. He earned his law degree at Hofstra University School of Law and was admitted to practice in 1994. Frank focuses on the areas of Elder Law, Estate and Trust Planning, Veterans Benefits, Trust and Estate Administration, and Real Estate.

Frank has been designated a Certified Elder Law Attorney (CELA) by the National Elder Law Foundation and is also an accredited attorney with the Department of Veteran's Affairs.

Frank is admitted to the New York State Bar and is a member of the New York State and Suffolk County Bar Associations. He is also a member of the National Academy of Elder Law Attorneys (NAELA) and is on the Board of the New York Chapter of NAELA. He is a member of the New York State and Suffolk County Bar Associations' Elder Law Committees (Past Co-Chair), and the Suffolk County Bar Association Surrogate's Court Committee. In addition, he is on the Legal Advisory Committee for the Alzheimer's Disease Resource Center and the Board of the Arthritis Foundation Long Island Chapter.

Frank is a sought-after writer and speaker. He has published articles in The Suffolk Lawyer, 50+ Lifestyles Newspaper, and Eldercare, Ltd. He has appeared in Newsday's Act II as "Ask the Expert" and in "Gray Matters." In addition, he has appeared as a frequent guest speaker on WALK AM Radio's "Memories in Melodies." Frank has presented numerous seminars on Elder Law and Estate Planning throughout Nassau and Suffolk Counties to both consumers and professionals.

Frank's practice has been devoted to Elder Law and closely related areas from the beginning. "When I graduated from law school, my first job as an attorney was with an Elder Law firm," says Frank. "I quickly realized that this was the area of law that I was meant to practice in. It gives me the opportunity to work closely with people, protect their assets from the high cost of long-term care, and preserve their dignity in the face of the challenges that come with growing older."

Frank was born and raised on Long Island, where he still lives with his wife and four children. He enjoys spending time with family and friends, and he enjoys reading and sports, especially playing golf and soccer.

## Nancy Burner Esq., CELA - Founding Manager and Partner

Nancy Burner, Esq., CELA is the founding and managing partner of Nancy Burner & Associates, PC established in 1995.

Nancy earned her undergraduate degree from Stony Brook University in 1985 where she graduated Magna Cum Laude. She graduated from Hofstra University School of Law in 1988 with distinction, and placed eighth in her class of 278.

Nancy is a member of the National Academy of Elder Law Attorneys, the Elder Law and Trust and Estates sections of the New York State Bar Association, the Suffolk County Bar Association, the Suffolk County Woman's Bar Association and the Real Property, Trust and Probate Committee of the American Bar Association. Nancy is a past president of the Suffolk County Woman's Bar Association. Nancy is certified by the National Elder Law Foundation, accredited by the American Bar Association. She is a contributing editor to the New York State Bar Association and co-authored a chapter in the treatise entitled "Guardianship Practice in New York State."

Nancy was recently re-appointed by the New York State Court of Appeals to serve a fifth term as one of only seven Trustees of the New York Lawyers' Fund for Client Protection. The Lawyers' Fund for Client Protection is a State administered Agency which was created in 1981 to protect law clients from the misuse of their money by dishonest attorneys and to promote public confidence in the administration of justice in New York State.

In 2007, Minneapolis-based Law & Politics publishers of Super Lawyers magazines announced that Nancy had been named to the 2007 edition of New York Metro Super Lawyers for the first time. Super Lawyers, published in the New York Times Magazine is a listing of outstanding lawyers from more than 70 practice areas who have attained a high degree of peer recognition and professional achievement in their respective fields. Each year, no more than 5 percent of the lawyers in the state receive this honor.

Nancy has been named a Super Lawyer each year since 2009 and most recently in April of 2014 has been named once again a Super Lawyer for her sixth consecutive year.

Nancy sits on the Legal Advisory Board of the Alzheimer's disease Resource Center of Long Island, serving individuals and the families of individuals who have been affected by Alzheimer's disease. She was named as the Chairperson for this committee in late 2012 and now serves as a board member. Beginning in the fall of 2011, Nancy has also applied her expertise and knowledge in Elder Law as an adjunct professor at Hofstra Law School.

Nancy is admitted to practice law in the State of New York. She lives in Miller Place with her family.



## **Steven A. Kass, Esq.**

**Managing Partner**

### **Admitted**

New York, 1993

New Jersey, 1993

### **Education**

Pace University School of Law, J.D., 1992

Pace University School of Law, Certificate in Health Law and Policy, 1992

State University of New York at Stony Brook, B.A., 1987

### **Associations & Memberships**

American Bar Association

New York State Bar Association

Nassau County Bar Association

Suffolk County Bar Association (Co-Chair, Elder Law and Estate Planning Committee, 2010-2012)

National Academy of Elder Law Attorneys

National Elder Law Foundation

Academy of Special Needs Planners

### **Representative Published Cases**

Matter of DiCecco, 173 Misc2d 692, 661 NYS2d 943 (N.Y. Sup., July 21, 1997). Mr. Kass successfully argued in New York for the rights of seniors and persons with disabilities to implement Medicaid Planning over the then federal law criminalizing such planning.

Matter of Balich, 2003 WL 21649907 (N.Y. Sup.); N.Y. Slip Op. 51080 (N.Y. Sup., Suffolk City, July 10, 2003). Mr. Kass represented a party in determining that a validly executed Health Care Proxy and Durable Power of Attorney are the least restrictive alternative for a person's personal needs and property management if the Agents are acting within the scope of their authority; the appointment of a Guardian was denied.

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**JOAN LENSKY ROBERT** is a member of KASSOFF, ROBERT & LERNER LLP, a law firm in Rockville Centre, New York practicing exclusively in the areas of elder law and disability law. Ms. Robert is a graduate of Skidmore College, where she was a member of Periclean, the Skidmore College Honor Society, the University of Pennsylvania, where she studied pursuant to a Ford Foundation Fellowship, and Touro College School of Law, summa cum laude, where she was the recipient of a Deans Fellowship and was valedictorian of the part time division. Prior to entering the practice of law, Ms. Robert taught French with the Valley Stream Central High School District.

Ms. Robert served as Chair of the New York State Bar Association Elder Law Section from 2003-2004 and served as Co-Chair of its Special Needs Planning Committee from 2006-2009. She served as Chair of its Mentorship Committee from 2010 – 2013 and is now Co-Chair of the Section's Mentoring program and of its Special Needs Planning Committee. She is a past member of the Committee of Persons with a Disability and of the Committee on Committees of the New York State Bar Association. She is an attorney member of the Guardianship Advisory Committee formed by the Office of Court Administration. She received a Lifetime Achievement Award from the New York State Elder Law and Special Needs Section in January, 2014. She has been named a Metropolitan New York Super Lawyer. Ms. Robert has been Board Certified as a Certified Elder Law Attorney (CELA) by the National Elder Law Foundation, approved as the sole Certifying Organization for Elder Law Attorneys by the American Bar Association.

A past member of the Board of Directors of the Nassau County Bar Association and a past chair of its Elder Law/Social Services/Health Advocacy Committee, Ms. Robert served as Dean of the Nassau Academy of Law. She served as a member of its nominating committee.

Ms. Robert is Past President of the New York Chapter of NAELA, the National Academy of Elder Law Attorneys and was a Co-Chair of the Special Needs Planning Summit sponsored by NAELA. She is a member of the Publications and Programs Task Force and is a member of the steering committee for the 2015 national NAELA ANNUAL CONFERENCE. Ms. Robert served as Co-Chair of the State Chapters Committee of NAELA. She received the NAELA award as outstanding member of the New York Chapter in 2012 and also received the Theresa Foundation Award for outstanding service and advocacy to persons with special needs, sponsored by NAELA.

Ms. Robert has been honored for outstanding service by the Long Island Alzheimer's Foundation, Project Real and the National Multiple Sclerosis Society.. She served on the Board of Editors of the Bill of Particulars, the

publication of the New York State Trial Lawyers Association, which honored her as outstanding downstate speaker. She has written numerous articles concerning the interrelationship between government entitlements and lawsuit recoveries. She co-wrote the chapter on Special Needs Planning in the book Guardianship Practice in New York State and wrote the chapters on Medicaid liens and planning in Personal Injury Actions in New York published by the New York State Bar Association. The author of numerous articles for community groups and professional groups concerning elder law and disability law, Ms. Robert has been a faculty member at various Bar Association programs concerning Elder Law, Supplemental Needs Trusts and asset preservation, and has been an instructor at certified training programs for Guardians, Supplemental Needs Trust Trustees and Court Evaluators. She is a past Editor in Chief of the New York Elder Law and Guardianship Newsletter.

Ms. Robert and her husband, Charles, are the proud parents of Heather Robert Coffman, Esq. and Jay Robert, Esq., an associate at Kassoff, Robert & Lerner, LLP. They are the doting grandparents of Naomi Coffman and Leo Coffman, residents of San Francisco.



## **ROCHESTER FACULTY BIOGRAPHIES**



Miles P. Zatkowsky, Esq.  
Dutcher & Zatkowsky  
Rochester, NY

Miles received his Juris Doctor in 1981. Following law school, he worked for the Justices of the Appellate Division of the Supreme Court of the State of New York, in the Second Judicial Department, one of the busiest appellate courts in the nation. Today, his practice is focused on Elder Law, with a particular emphasis on Guardianships for incapacitated individuals, Medicaid Planning and Asset Protection, Estate Planning, Probate and Estate Administration. He also engages in civil litigation involving the recovery of assets wrongfully taken from elderly clients.

Miles lectures frequently on Elder Law issues involving Guardianships, hospital discharge planning and nursing home placements for various bar and judicial associations, and medical and health care groups. He is active in the National Academy of Elder Law Attorneys, serving on the Guardianship Steering Committee, and the New York State and Monroe County Bar Associations' Elder Law Committees and the state's Executive Committee. Miles serves on many Boards and Committees and is currently a Director of the Rochester Area Alzheimer's Association, the Rochester Board of Directors of the American Diabetes Association and is the Advocacy Chair, serving on national committees for the ADA. He is also one of the original Trustees of the Future Care Planning Pooled Supplemental Needs Trust.

He is a member of the Elder Abuse Prevention Consortium, a collection of professionals whose objective is to protect the rights of elder adults and reverse the growing trend of abuse. Miles also serves on the Monroe County Older Adult Fatality Review Committee, one of only a few panels in the nation which reviews the cases of deaths of older adults to assist in improving the availability of services in an effort to prevent future abuses and fatalities.

Born in Brooklyn, Miles moved to Rochester, New York, in 1986 and now resides in Brighton with his wife and two dogs. He has two grown daughters. When not practicing law, Miles is an avid cyclist, and enjoys skiing and the outdoors.

Bio: Jennifer Helmbold, MPA

Program Director Aging Adults with Developmental Disabilities, Future Care Planning Services

Trust Administrator: Future Care Planning Trust Services

Jennifer began her career in the field of aging and disabilities eighteen years ago when she joined Lifespan. Since day one, Jennifer has devoted her time and commitment towards identifying and addressing the unique needs faced by a population growing older. Jennifer is a strong advocate for both systems change and cross- systems collaboration in order to successfully serve and honor the older adult population. Jennifer has been the Director of Lifespan's Aging Adults with Developmental Disabilities program for thirteen years. Prior to this role, she worked as a care manager and this past winter Jennifer celebrated her two year anniversary after being given the opportunity and honor of leading the Future Care Planning Services and Future Care Trust. Future Care Planning Services and the Future Care Trust are a collaborative of Lifespan, Arc of Monroe and the Al Sigl Community of Agencies.

Jennifer believes in Life Long Learning and in such fashion, teaches an elective course, Aging and Disabilities, as part of Lifespan's Gerontology certificate program. Jennifer is an active board member of CCCS of Rochester and participated in the Partner's Towards Independence collaborative.

Jennifer has devoted her career to ensuring older adults with disabilities are not forgotten or left behind in this fast-paced society. Moreover, Jennifer works tirelessly to ensure older adults with disabilities continue to have a voice and that their voice is heard. Jennifer works with various community providers to ensure older adults with disabilities are awarded the same opportunities and access to services available to all community members.



## Jesslyn A. Holbrook, JD, MSW

Jesslyn is an associate attorney with the law firm of Dutcher & Zatkowsky, where she focuses on all areas of Elder Law, including Mental Hygiene Law Article 81 Guardianship proceedings, Estate Planning, Surrogate's Court practice, and Medicaid Planning and Asset Protection.

Jesslyn is a magna cum laude graduate of the University at Buffalo School of Law and has a Master's degree in Social Work. She is a member of a number of civic and professional organizations, including the Greater Rochester Area Partnership for the Elderly (GRAPE), the New York State Bar Association, the Monroe County Bar Association (MCBA), and the Greater Rochester Association for Women Attorneys (GRAWA). She serves on several committees, including the Advocacy Committee for GRAPE, the Elder Law committee of the MCBA, and the Women's Health Committee of GRAWA. She has also been a volunteer educator for the Alzheimer's Association.

Jesslyn is enthusiastic about the practice of Elder Law and strives to create a professional, friendly, and welcoming environment for our clients. When Jesslyn is not practicing law, she can usually be found in a yoga or Pilates class, or spending time with her husband and three dogs.



## JULIE S. JORDAN, ESQ.

Rochester, New York

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*Ms. Jordan focuses her practice on claims involving medical malpractice and nursing home neglect and abuse. She leads Faraci Lange's Nursing Home Neglect and Abuse Practice and is a tireless advocate in New York State and Federal courts for injured individuals and families. She has successfully resolved claims involving injuries suffered due to medical malpractice, negligent care and treatment, defectively designed and manufactured products, and defective premises.*

Ms. Jordan serves on the Public Affairs Committee of the American Association for Justice and is also a member of the AAJ Nursing Home Neglect and Abuse Litigation Group. As part of her role on the Public Affairs Committee, Ms. Jordan advises Executives of AAJ on policies, legislation pending before Congress and state legislatures that affect trial lawyers, and offers strategies on how to deal with it.

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### PRACTICE AREA CONCENTRATION

Medical Malpractice  
Nursing Home Neglect & Abuse  
Products Liability

### MEMBERSHIPS

American Association for Justice  
New York State Academy of Trial Lawyers  
Greater Rochester Association for Women Attorneys  
Better Business Partners Serving Seniors  
The National Consumer Voice for Quality Long-Term Care  
New York State Bar Association  
Monroe County Bar Association

### EDUCATION

University of Rochester, B.A.  
Syracuse University College of Law, J.D.

### HONORS AND AWARDS

Upstate New York Super Lawyers Rising Star Medical Malpractice  
Daily Record 2010 Up & Coming Attorney

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Rochester, NY 14614

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**RICHARD A. MARCHESE, ESQ.**

Richard A. Marchese is a Partner at Woods Oviatt Gilman LLP in Rochester, New York. He is a member of the firm's Elder Law and Health Care Practice Group responsible for handling all elder law and health care issues. He concentrates his practice in Medicaid and Estate planning, Social Security, Medicare and Medicaid eligibility and recovery matters, asset protection, issues of spousal support, and the use of trusts in Medicaid planning. Mr. Marchese also provides counsel to health care providers in matters of compliance with federal and state regulations, defense of government audits and investigations, voluntary self-disclosures, corporate compliance and professional licensure issues.

Prior to joining the firm, Mr. Marchese served for over fifteen years as counsel to the Monroe County, N.Y. Department of Human Services, advising the Chronic Care, Home Care and Adult Protective units at that agency. He was a co-director of the Monroe County Provider Fund, Waste and Abuse Demonstration Project, and he now represents Medicaid providers in matters of compliance with government regulations and defense against government audits.

He received his JD from New York Law School and his BA from the State University of New York at Albany.

Mr. Marchese is a member of the Monroe County and New York State Bar Associations and a member of the National Academy of Elder Law Attorneys, Inc. (NAELA). He is also a member of the Executive Committee of the Elder Law Section of the New York State Bar Association and the Estate Planning Council of Rochester.

## Biography

**Jennifer N. Weidner, Esq.**  
*VP, Trust Administration Officer*

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### **YOUR FINANCIAL PROFESSIONAL**

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Jennifer brings over 20 years of trust & estate planning and administration experience. She joined CNB's Wealth Strategies Group in 2014 as Vice President and Trust Administration Officer. In this role, Jennifer supports the business initiatives of the Wealth Strategies Group along with the planning and administration of client fiduciary accounts, including those with our affiliate, Canandaigua National Trust Company of Florida.

Prior to joining CNB, Jennifer was partner in the Trust & Estate Group at the law firm of Boylan Code, where she specialized in trust and estate planning & administration, and transfer tax planning for high net worth individuals and business owners.

### **PROFESSIONAL & CIVIC AFFILIATIONS**

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NYS Bar Association, Chair of the TELS Membership Committee  
Monroe County Bar Association, Trust & Estate Section  
Estate Planning Council of Rochester, Secretary, Director, Chair of the Membership Committee, Executive Committee  
Foodlink, Inc., Leadership Committee  
Rochester Rehabilitation Center, past Board Member  
Monroe Community College Foundation, past Board Member

### **EDUCATION & DESIGNATIONS**

---

Brandeis University  
University of Buffalo, Juris Doctor, magna cum laude

Wealth  
Strategies  
Group



Canandaigua  
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Anthony J. Enea, Esq. is the managing member of Enea, Scanlan & Sirignano, LLP with offices in White Plains and Somers, New York. For approximately thirty (30) years, Mr. Enea has devoted his practice to educating and protecting the rights of seniors, the disabled and their families from the costs of long term care.

Mr. Enea and his firm concentrate their practice on Elder Law, Asset Protecting Planning, Medicaid Applications (Nursing Home and Home Care), Guardianships (contested/non-contested), Wills, Trusts and Estates, Estate Litigation and Nursing Home Negligence.

He is the author of hundreds of published articles and a frequent lecturer to seniors, the disabled, attorneys, CPA's and financial advisors, with respect to the planning options available to seniors and their rights. For decades these articles have been published in such publications as "Generations", "60 Plus", the Westchester County Business Journal, Westchester County Bar Newsletter and numerous New York State Bar Association publications.

**ES**  
**&S** Enea, Scanlan & Sirignano, LLP

Attorneys at Law

Mr. Enea is Certified as an Elder Law Attorney by the National Elder Law Foundation as accredited by the American Bar Association. \*He is a former member of the Executive Committee of the Trusts and Estates Section of the New York State Bar Association as a Vice-Chair of the Committee on the Elderly and Disabled.

Mr. Enea is the Past Chair of the Elder Law Section of the New York State Bar Association.

Mr. Enea is a Past President and a Founding Member of the New York Chapter of the National Academy of Elder Law Attorneys (NAELA). He is also a member of the Council of Advanced Practitioners of NAELA.

Mr. Enea is a Past President of the Westchester County Bar Association.

Mr. Enea is the President of the Westchester County Bar Foundation.

Mr. Enea is a Vice President of the Columbian Lawyers Association of Westchester County.

Mr. Enea is the recipient of the "Above the Bar Award" as the Leading Eldercare attorney in Westchester County. This award is presented by the Westchester County Bar Association, Pace Law School, the Westchester Women's Bar Association, the Westchester County Business Journal and the firm of Citrin Cooperman.

Mr. Enea has been selected as a Super Lawyer for the eighth consecutive year and for 2009, 2010, 2013 and 2014 was selected as a Top 25 Super Lawyer in Westchester County.

Mr. Enea for the third consecutive year has also been selected for inclusion in the "Best Lawyers in America" as an Elder Law Attorney. For the year 2015, he is the recipient of the award as "Lawyer of the Year" for 2015 in Trusts and Estates for White Plains.

Mr. Enea is an "AV" Rated Preeminent Attorney as rated by Martindale-Hubbell.

Mr. Enea is also fluent in Italian.



**ADRIENNE ARKONTAKY**

Cuddy Law Firm, White Plains

Adrienne J. Arkontaky is the Vice President and Managing Attorney of the White Plains Office with The Cuddy Law Firm. Adrienne's practice focuses on special needs planning, special education advocacy and guardianship for families of children with disabilities.

Adrienne focuses her practice on addressing the legal needs of families with loved ones with disabilities. Throughout her career, she has assisted families in obtaining appropriate education services for their children. She also helps in creating special needs estate plans that address the unique needs of individuals with disabilities and that protect access to government benefit programs, address guardianship issues and assist families and corporate trustees in administering special needs trusts. She also represents families in Medicaid and OPWDD hearings. She is committed to providing her clients with personalized service and expertise.

Adrienne previously served as the Pro Bono Coordinator for a major law firm and a Service Coordinator for Family Connection, an agency providing case management for families of children with disabilities. She also was the Supervising Partner of the Special Education practice group of a New York-based law firm advocating for the rights of children with special education needs in New York City and throughout New York State. She dedicates a portion of her practice to representing non-English-speaking families at due process hearings in New York City. Adrienne received her Juris Doctor degree from Pace University School of Law and received her Bachelor of Arts degree from Iona College.

Adrienne is also a member of the Committee on Issues Affecting Persons with Disabilities for the New York State Bar Association and the Co-Chairperson of the Special Needs Planning Committee of the NYSBA and Lawyering and Parenting Committee of the Westchester Women's Bar Association. She also serves as Co-Editor of the Elder Law and Special Needs Journal, a publication of the NYSBA. Adrienne is admitted to practice in the state of New York and the Southern District Court of New York.

Adrienne serves as Trustee on the Board of the John A. Coleman School, with campuses in New York City and White Plains. The John A. Coleman School serves children with multiple disabilities in Westchester and the five boroughs. She is a member of the Council of Parent Advocates and Attorneys (COPAA) and serves as acting President of Family Ties, an organization dedicated to serving the needs of families with loved ones with mental illness. Adrienne lectures nationally and locally on special needs planning and the importance of understanding special education laws.

Adrienne lives in Westchester with her husband, Peter and 3 children. She is the parent of a special needs child. The driving force to dedicate her practice in this area has been her daughter Jordan, who was born with severe disabilities.

## **BIOGRAPHY OF ROBERT M. FREEDMAN**

Robert M. Freedman is a partner at Schiff Hardin LLP in New York City. He focuses his practice on elder law, special needs planning, and trusts and estates. Mr. Freedman is nationally recognized authority and pioneer in the field of elder law. He has more than 30 years of experience assisting multigenerational families with planning for their current and future needs related to: Long-term care planning, Medicaid eligibility, Medicare, Guardianship, Tax planning and Estate administration. Mr. Freedman's focus on elder law began in law school, and in 1985, he founded one of the nation's first elder law firms. He is a founder of both the National Academy of Elder Law Attorneys (NAELA) and the Elder Law and Special Needs Section of the New York State Bar Association.

Mr. Freedman represents individuals with disabilities and mental illness and their families. His legal experience and his knowledge of available services for individuals with disabilities allow him to provide practical, thoughtful estate planning for his clients and their loved ones.

**JUDITH D. GRIMALDI, ESQ., CELA, CSW**

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**Judith D. Grimaldi**, is a partner in the pioneering elder law firm **GRIMALDI & YEUNG LLP**. Ms. Grimaldi's perspective on the issues facing the elderly and disabled is unique; it was shaped by more than a decade of field experience as a social worker. In this capacity, Ms. Grimaldi served as Director of Lutheran Medical Center's Community Care Organization and instructor in Gerontology in Marymount Manhattan College. In addition, she was a community relations and family coordinator at South Beach Psychiatric Center of Brooklyn and Staten Island, New York.

Each of these positions provided her with unique, first-hand encounters with the day-to-day impact of aging and disability.

As an attorney for over 20 years, Ms. Grimaldi has represented the rights of the elderly and disabled. She has special expertise on Medicare and Medicaid, health law, trusts and wills and estates. Her particular focus is on family caregivers and homecare. Ms. Grimaldi is a Certified Elder Law Attorney. She has been named one of **"New York's Women Leaders in the Law 2012"**, by New York Magazine and after an extensive peer review and rating process, New York Magazine has named her one of New York's **"Best Lawyers" 2008 to 2015**, and has also been named **"Super Lawyer" 2009 to 2014**. She is also Peer Review Rated for ethical standards and legal ability through Martindale-Hubbell, and is currently an adjunct professor of Brooklyn Law School.

Ms. Grimaldi is the Immediate Past President of the National Academy of Elder Law Attorneys (NAELA), New York Chapter, she is a member of NAELA's Council of Advanced Practitioners (CAP), and a past member of CAP's Steering Committee. She is past Chair of the New York City Bar Association's Legal Problems of the Aging Committee, Treasurer of the New York State Bar Association's Elder Law Section, Co-Chair of the Health Issues Committee of the New York State Bar Association's Elder Law Section, Charter member of the Academy of Special Needs Planners and the National Academy of Elder Law Attorneys, and active in the Senior Issue Committee of New York City's Community Board 10, where she is currently working on developing a Bay Ridge Age Friendly Improvement District. Ms. Grimaldi has been AV-rated by Martindale-Hubbell, named "Best Lawyer" from 2008 to 2015, "Super Lawyer" from 2009 to 2014, and has authored an upcoming book, **"5@55"**, a primer for essential legal tools for estate planning.

A 1993 graduate of Brooklyn Law School, Ms. Grimaldi also holds an MSW from Hunter College of the City of New York (1982, with honors) and a BA from Marymount Manhattan College with a certificate in Gerontology (1980, *summa cum laude*).

*Articles:*

*Author, "Staying at Home Options Other Than Medicaid," New York State Bar Association Advance Elder Law Seminar, Spring 2001; Personal Care Contract Options, January 2008, MOLST: New York State's Medical Orders to Honor the Wishes of Seriously Ill Patient, NYSBA Elder Law Attorney, Spring 2009; "New York State's Power of Attorney Gets a New Look & Better Control", Alzheimer's Association, NYC Chapter, Summer 2009; Overview of Health Care Reform: Impact on Medicare and Medicaid Recipients, NYSBA, Fall, 2010; Legal Capacity Counseling, NAELA Advanced Elder Law Review, January, 2011; Updates on Health Care Reform: Impact on Medicare and Medicaid Recipients, NAELA News, Winter, 2011; The Class Act – Community Living Assistance Services Supports Act—A Long Term Care Option in the Health Care Legislation, NYSBA Newsletter, Spring, 2011.*

*Books:*

*Inside the Minds: Best Practices for Long-Term Planning and Nursing Home Protection, Aspatore Publishers, a Thomson Reuters business - Authored chapter: Effective Strategies for Client Long-Term Care, March, 2011.*

**Sara Meyers, Esq.**  
**Enea, Scanlan & Sirignano, LLP**  
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Ms. Meyers is a Member of the firm of Enea, Scanlan & Sirignano, LLP, and concentrates her practice on Elder Law, Estate Planning, Special Needs Planning, Guardianships, and long term care planning strategies, with a focus on Medicaid home care and nursing home. She has been named to the 2013 and 2014 New York Metro Super Lawyers list in Elder Law.

Prior to Enea, Scanlan & Sirignano, Ms. Meyers was a staff attorney at the Sadin Institute on Law of the Brookdale Center for Healthy Aging and Longevity and the New York Legal Assistance Group. At Sadin, Sara concentrated on Medicaid, home care, and the Medicare Part D prescription drug program. She created materials and conducted training seminars for social service providers, attorneys, and social workers on topics including Elder Law, Medicaid, Medicare, home care, and Administrative Appeals.

Ms. Meyers has authored "Medicaid Managed Long Term Care is Coming to Westchester. Are You and Your Clients Ready?," Westchester County Bar Newsletter, January 2013; "Guardianships and Supplemental Needs Trusts (SNT) as planning tools for Parents of Adult Disabled Children," New York State Bar Association Elder Law and Special Needs Journal, Winter 2012; "An Overview of Medicaid Home Care Options for Seniors," New York State Bar Association Elder Law Attorney, Winter 2010; "Utilizing Medicaid Home Care as a Solution in a Post-DRA World," New York State Bar Association Elder Law Attorney, Summer 2007 and Westchester County Bar Newsletter, June 2007. Ms. Meyers coauthored with Anthony J. Enea "The Doors Open Further for the Nursing Home without Walls Program," Westchester County Bar Newsletter, November 2007.

Ms. Meyers is a frequent lecturer for Elder Law Programs sponsored by the New York State and Westchester County Bar Associations.

She is a member of the New York State Bar Association, the Elder Law and Special Needs Section (Executive Committee, vice-chair Medicaid Committee and 9<sup>th</sup> District Delegate; Editor, Elder Law and Special Needs Journal) and Trust and Estates Section, and a member of the Westchester County Bar Association (past Co-Chair of the Elder Law Committee) and is an editor of the Westchester County Bar Journal.

Ms. Meyers has a B.A. in History, cum laude, from Brandeis University and a J.D. from the Cardozo School of Law. She is also a volunteer attorney for Legal Services of the Hudson Valley. She is a Trustee of the Board of Directors of the Westchester Day School in Mamaroneck, New York.

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**JOAN LENSKY ROBERT** is a member of KASSOFF, ROBERT & LERNER LLP, a law firm in Rockville Centre, New York practicing exclusively in the areas of elder law and disability law. Ms. Robert is a graduate of Skidmore College, where she was a member of Periclean, the Skidmore College Honor Society, the University of Pennsylvania, where she studied pursuant to a Ford Foundation Fellowship, and Touro College School of Law, summa cum laude, where she was the recipient of a Deans Fellowship and was valedictorian of the part time division. Prior to entering the practice of law, Ms. Robert taught French with the Valley Stream Central High School District.

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Ms. Robert has been honored for outstanding service by the Long Island Alzheimer's Foundation, Project Real and the National Multiple Sclerosis Society.. She served on the Board of Editors of the Bill of Particulars, the

**Richard A. Weinblatt**

**Haley Weinblatt & Calcagni, LLP, Islandia**

Richard A. Weinblatt, a partner in the firm, concentrates in the areas of Elder Law, including Medicaid planning, representing clients before Departments of Social Services, and guardianship proceedings; estate planning and estate administration; and contested Surrogate's Court proceedings.

Richard received his undergraduate degree in accounting from New York Institute of Technology and a Master's degree in taxation from C.W. Post College. He received his law degree from St. John's University, from which he graduated magna cum laude and where he received numerous academic awards, which included the Prentice Hall Award in Taxation and American Jurisprudence Awards for excellence in Advanced Personal Income Tax and Gift and Estate Taxation. Upon graduation from law school, Richard entered private practice and joined our firm as a partner at its inception in 1994.

Richard is an adjunct professor of taxation law at Touro Law Center and is a frequent lecturer in the areas of Medicaid planning and trusts and estates for the New York State Bar Association and the Suffolk County Bar Association. Richard has also lectured on various Elder Law and estate-related topics for the Queens County and Nassau County Bar Associations, as well as for numerous community and religious organizations.

Richard has held offices in several professional organizations, including serving as President of the Suffolk County Chapter of the Long Island Estate Planning Council, District Delegate to the Elder Law Section of the NYS Bar Association, Associate Dean of the Suffolk Academy of Law, and Director of the Suffolk County Bar Association. He has chaired the Elder Law, Surrogate's Court and Tax Committees of the Suffolk County Bar Association. Richard has received an AV<sup>®\*</sup> rating from Martindale-Hubbell, its highest rating.

Richard is a member of both the National Association of Elder Law Attorneys and of its New York chapter. He is a Certified Public Accountant and served for many years both as trustee and as President of the Board of Education of the Smithtown School District.

publication of the New York State Trial Lawyers Association, which honored her as outstanding downstate speaker. She has written numerous articles concerning the interrelationship between government entitlements and lawsuit recoveries. She co-wrote the chapter on Special Needs Planning in the book Guardianship Practice in New York State and wrote the chapters on Medicaid liens and planning in Personal Injury Actions in New York published by the New York State Bar Association. The author of numerous articles for community groups and professional groups concerning elder law and disability law, Ms. Robert has been a faculty member at various Bar Association programs concerning Elder Law, Supplemental Needs Trusts and asset preservation, and has been an instructor at certified training programs for Guardians, Supplemental Needs Trust Trustees and Court Evaluators. She is a past Editor in Chief of the New York Elder Law and Guardianship Newsletter.

Ms. Robert and her husband, Charles, are the proud parents of Heather Robert Coffman, Esq. and Jay Robert, Esq., an associate at Kassoff, Robert & Lerner, LLP. They are the doting grandparents of Naomi Coffman and Leo Coffman, residents of San Francisco.





## **WESTCHESTER FACULTY BIOGRAPHIES**





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Frances M. Pantaleo is a partner at Bleakley Platt & Schmidt LLP, handling a broad range of matters with a particular emphasis in the areas of elder law, estate planning, drafting wills and trusts, probate and administration of estates, guardianship proceedings under Article 81 of the Mental Hygiene Law and Article 17A of the Surrogate's Court Procedure Act, and drafting and administration of supplemental needs trusts. Ms. Pantaleo has received an AV rating from the Martindale-Hubbell peer review, the highest rating available, for her legal skills and ethical standards.

Ms. Pantaleo is the immediate Past-Chair of the Elder Law and Special Needs Section of the New York State Bar Association and a member of the National Academy of Elder Law Attorneys. She has previously served as Chair of the Elder Law Committees of the Westchester Women's Bar Association and the Westchester County Bar Association.

Ms. Pantaleo received her J.D. from New York University Law School in 1979 and is a *summa cum laude* graduate of Brooklyn College, CUNY. Ms. Pantaleo has been recognized as a "Super Lawyer" in the area of Elder Law and was named one of the top twenty-five attorneys in Westchester County in both 2011 and 2012. In 2007, Ms. Pantaleo received a Partner in Justice Award in recognition of her outstanding pro bono assistance to Legal Services of the Hudson Valley. Ms. Pantaleo serves on the Board of the Hudson Valley/Rockland/Westchester Chapter of the Alzheimer's Association. She is a frequent lecturer on elder law and special needs planning for professional education programs for attorneys and financial professionals and to community organizations such as The Alzheimer's Association, AARP, UJA-Federation, The Pace Women's Justice Center, Westchester ARC and Senior Law Day programs offered by Westchester County Department of Senior Services and programs.

**ADRIENNE ARKONTAKY**

Cuddy Law Firm, White Plains

Adrienne J. Arkontaky is the Vice President and Managing Attorney of the White Plains Office with The Cuddy Law Firm. Adrienne's practice focuses on special needs planning, special education advocacy and guardianship for families of children with disabilities.

Adrienne focuses her practice on addressing the legal needs of families with loved ones with disabilities. Throughout her career, she has assisted families in obtaining appropriate education services for their children. She also helps in creating special needs estate plans that address the unique needs of individuals with disabilities and that protect access to government benefit programs, address guardianship issues and assist families and corporate trustees in administering special needs trusts. She also represents families in Medicaid and OPWDD hearings. She is committed to providing her clients with personalized service and expertise.

Adrienne previously served as the Pro Bono Coordinator for a major law firm and a Service Coordinator for Family Connection, an agency providing case management for families of children with disabilities. She also was the Supervising Partner of the Special Education practice group of a New York-based law firm advocating for the rights of children with special education needs in New York City and throughout New York State. She dedicates a portion of her practice to representing non-English-speaking families at due process hearings in New York City. Adrienne received her Juris Doctor degree from Pace University School of Law and received her Bachelor of Arts degree from Iona College.

Adrienne is also a member of the Committee on Issues Affecting Persons with Disabilities for the New York State Bar Association and the Co-Chairperson of the Special Needs Planning Committee of the NYSBA and Lawyering and Parenting Committee of the Westchester Women's Bar Association. She also serves as Co-Editor of the Elder Law and Special Needs Journal, a publication of the NYSBA. Adrienne is admitted to practice in the state of New York and the Southern District Court of New York.

Adrienne serves as Trustee on the Board of the John A. Coleman School, with campuses in New York City and White Plains. The John A. Coleman School serves children with multiple disabilities in Westchester and the five boroughs. She is a member of the Council of Parent Advocates and Attorneys (COPAA) and serves as acting President of Family Ties, an organization dedicated to serving the needs of families with loved ones with mental illness. Adrienne lectures nationally and locally on special needs planning and the importance of understanding special education laws.

Adrienne lives in Westchester with her husband, Peter and 3 children. She is the parent of a special needs child. The driving force to dedicate her practice in this area has been her daughter Jordan, who was born with severe disabilities.

## **BIOGRAPHY OF ROBERT M. FREEDMAN**

Robert M. Freedman is a partner at Schiff Hardin LLP in New York City. He focuses his practice on elder law, special needs planning, and trusts and estates. Mr. Freedman is nationally recognized authority and pioneer in the field of elder law. He has more than 30 years of experience assisting multigenerational families with planning for their current and future needs related to: Long-term care planning, Medicaid eligibility, Medicare, Guardianship, Tax planning and Estate administration. Mr. Freedman's focus on elder law began in law school, and in 1985, he founded one of the nation's first elder law firms. He is a founder of both the National Academy of Elder Law Attorneys (NAELA) and the Elder Law and Special Needs Section of the New York State Bar Association.

Mr. Freedman represents individuals with disabilities and mental illness and their families. His legal experience and his knowledge of available services for individuals with disabilities allow him to provide practical, thoughtful estate planning for his clients and their loved ones.

**Sara Meyers, Esq.**  
**Enea, Scanlan & Sirignano, LLP**  
**245 Main Street**  
**White Plains, NY 10601**  
**(914) 948-1500**  
**s.meyers@esslawfirm.com**

Ms. Meyers is a Partner at the firm of Enea, Scanlan & Sirignano, LLP, and concentrates her practice on Elder Law, Estate Planning, Special Needs Planning, Guardianships, and long term care planning strategies, with a focus on Medicaid home care and nursing home.

Prior to joining Enea, Scanlan & Sirignano, Ms. Meyers was the staff attorney at the Sadin Institute on Law of the Brookdale Center on Aging of Hunter College. She concentrated on Medicaid, home care, and the Medicare Part D prescription drug program. She created materials and conducted training seminars for social service providers, attorneys, and social workers on topics including Elder Law, Medicaid, Medicare, home care, and Administrative Appeals.

Ms. Meyers has authored "Medicaid Managed Long Term Care is Coming to Westchester. Are You and Your Clients Ready?," Westchester County Bar Newsletter, January 2013; "Guardianships and Supplemental Needs Trusts (SNT) as planning tools for Parents of Adult Disabled Children," New York State Bar Association Elder Law and Special Needs Journal, Winter 2012; "An Overview of Medicaid Home Care Options for Seniors," New York State Bar Association Elder Law Attorney, Winter 2010; "Utilizing Medicaid Home Care as a Solution in a Post-DRA World," New York State Bar Association Elder Law Attorney, Summer 2007 and Westchester County Bar Newsletter, June 2007. Ms. Meyers coauthored with Anthony J. Enea "The Doors Open Further for the Nursing Home without Walls Program," Westchester County Bar Newsletter, November 2007.

Ms. Meyers is a frequent lecturer for Elder Law Programs sponsored by the New York State and Westchester County Bar Associations.

She is a member of the New York State Bar Association, the Elder Law (Executive Committee; Editor, Elder Law and Special Needs Journal) and Trust and Estates Sections, and a member of the Westchester County Bar Association (immediate past Co-Chair of the Elder Law Committee) and is an editor of the Westchester County Bar Journal.

Ms. Meyers has a B.A. in History, cum laude, from Brandeis University and a J.D. from the Cardozo School of Law. She is also a volunteer attorney for Legal Services of the Hudson Valley. She is a Trustee of the Board of Directors of the Westchester Day School in Mamaroneck, New York.

**Deepankar Mukerji**

Of Counsel

Keane & Beane, P.C., White Plains

**Professional Experience**

Deepankar Mukerji conducts a general law practice in the areas of elder law, Medicaid planning, estate administration and planning, guardianships, real estate and trusts. He is well known for his work in the elder law arena. Mr. Mukerji became of counsel to the firm in 2007 after twelve years with the Westchester County Department of Social Services.

**Admissions**

State Courts of Connecticut

State Courts of New York

Professional Associations

New York State Bar Association (Vice-Chair, Legislation Committee; Vice-Chair, Diversity Committee; Ninth District Representative; Executive Committee Member)

Westchester County Bar Association (Vice-Chair, Elder Law Committee)

**Professional Activities/Publications**

Mr. Mukerji is a frequent lecturer on elder law issues for the New York State Bar Association, Westchester County Bar Association and Pace University School of Law. His lectures have included: "Hot Topics in Elder Law: Home Care"; "Hot Topics in Elder Law: Medicaid Issues"; and "Paying for Long Term Care".

In 2011, Elder Law Attorney published "Article 17-A Guardianships -- In Need of a Legislative Overhaul" by Mr. Mukerji. He is also an Editor and Contributor for Elder Law E-News.

**Community Service**

Mr. Mukerji is on the Board of Directors for the Center for Aging in Place Support. He is also active in the Long Term Care Council of Westchester and the Geriatric Mental Health Coalition of Westchester.

**Education**

1995, J.D., Fordham University School of Law

1983, B.A., State University of New York at Buffalo

### MARIE VAZ

Marie Vaz has been a Staff Attorney in the Evelyn Frank Legal Resources Program since 2012. The Evelyn Frank program moved from Selfhelp Community Services, Inc. to the New York Legal Assistance Group in April 2013. Marie specializes in Medicaid and Medicare eligibility and services, emphasizing the needs of low-income people seeking long-term care services. She graduated from Fordham Law School in 2011 as a Stein Scholar in Public Interest Law and Ethics, where she participated in the Consumer Law Clinic. Marie interned during and after law school in Medical-Legal Partnership programs at Manhattan Legal Services and Legal Services NYC-Bronx office, and also for Georgia Legal Services. She represented and coordinated services for children with severe developmental disabilities for SKIP of New York. Marie graduated from Emory University.



## **ALBANY FACULTY BIOGRAPHIES**



JulieAnn Calareso, Esq.

JulieAnn Calareso, Esq. is a principal of Burke & Casserly, P.C. She focuses her practice on **elder law, wills and trusts, estate administration and probate, special needs planning, and corporation and business formation and succession planning.**

Beginning in the spring of 2015, JulieAnn is serving as the Chair of the New York State Bar Association's Elder Law and Special Needs section. JulieAnn also represents the New York State Bar Association on a state wide initiative formed in collaboration with the New York State Office for the Aging, the Office of Court Administration, and private groups seeking to evaluate the delivery of legal services in New York to the elderly and disabled, and charged with recommending changes to make New York's legal system more accessible to that population.

JulieAnn serves on the Board of Directors of the Alzheimer's Association of Northeastern New York's, and has previously been honored with the Lisa Goldberg Memorial Award for outstanding commitment and service to that Board. She also serves as a member of the Board of Directors of Catholic Charities Senior and Caregiver Support Services, an agency under Catholic Charities of the Roman Catholic Diocese of Albany, New York. The focus of this agency is providing services to seniors and caregivers throughout the Diocese's fourteen county region. JulieAnn is a former Director of Senior Services of Albany, and is a member of the Capital District Caregivers Coalition, where she works with other dedicated professionals to provide educational and supportive programming for persons providing care to others. She is a graduate of the Leadership Tech Valley Class of 2011, a joint leadership initiative of the Albany Colonie and Schenectady Chambers of Commerce.

JulieAnn was honored by the Albany-Colonie Regional Chamber of Commerce as the recipient of its 2009 Women of Excellence award in the Emerging Professional category.

She is a graduate of Albany Law School of Union University where she earned her Juris Doctorate, magna cum laude, having earned membership into the Justinian Honor Society for excellence in legal scholarship. She served as an Associate Editor of the Albany Law Review, and interned at the New York State Office of the Attorney General, Charities Bureau.

Before joining the firm, JulieAnn worked as an Appellate Court Attorney for the New York State Supreme Court, Appellate Division, Third Department.

Her undergraduate degree is from Fordham University, where, in 1994, she earned a Bachelor of Arts in Communications, cum laude, while participating in the Honors Program. Prior to beginning a career of law, JulieAnn worked in television and feature film production in New York and Los Angeles.

Heidi J. Flatt, CPA  
Chief Operating Officer  
NYSARC Inc. Trust Services  
Latham

Heidi J. Flatt, CPA is the Associate Executive Director for Trust Services for NYSARC, Inc. Ms. Flatt has been the administrator of NYSARC's trust programs since 2000. She has been employed in a financial management capacity for NYSARC since 1992. A graduate of the State University of New York at Oneonta, she holds a Bachelor of Science degree in Business Economics with Accounting and Finance concentrations. Ms. Flatt is a Certified Public Accountant, licensed in the State of New York. Her professional affiliations include membership in the American Institute of Certified Public Accountants and the New York State Society of Certified Public Accountants. She is a Trustee of the Brittonkill Educational Foundation and a parishioner and past Vestry member of All Saints Church in Hoosick, NY. Heidi has presented on NYSARC's trust services programs for the NYS Bar Association, law firms, agencies, and service providers across New York State. She is dedicated to addressing the needs of individuals with disabilities through the use of supplemental needs trusts. Her extensive experience working with supplemental needs trusts and programs for the disabled has allowed her to become very knowledgeable in the areas of Medicaid, Social Security, and other government benefits, as well as, to understand the needs of those with varying disabilities.

**Robert P. Mascali, Esq.**

Pierro, Schaeffer & Connor, LLC., Albany

Bob Mascali has over 35 years of experience and concentrates in the areas of Special Needs Planning for persons with disabilities, Long-Term Care Planning, and Estate Planning. Before joining Pierro, Schaeffer & Connor, LLC in 2012, Mr. Mascali served as the Associate General Counsel at NYSARC, INC. and served as Counsel to NYSARC Trust Services which operates a nationally renowned special needs trust program, including one of the largest pooled trusts in the nation. Prior to that position, Mr. Mascali was appointed and served as Deputy Counsel and Managing Attorney for the New York State Office of Mental Retardation and Developmental Disabilities (now the Office for People with Developmental Disabilities) and was primarily responsible for providing legal advice to senior state officials on guardianship matters and special needs trusts.

Mr. Mascali is a member of the New York State Bar Association and its Elder Law and Trusts and Estates sections. He serves on the Executive Committee and is Co-Chair of the Special Needs Planning Committee of the Elder Law Section. In 2013, Mr. Mascali was elected as the Third District Representative for the Elder Law Section to the NYSBA House of Delegates. He is a member of the National Academy of Elder Law Attorneys (NAELA), and current serves as 2015 President-elect of the New York Chapter. Prior to his governmental service, Mr. Mascali was a founding partner of Cohen, Jason and Mascali in Scarsdale, New York and was engaged for over 20 years in private practice in metropolitan New York concentrating on real property and estate and trust matters.

Mr. Mascali currently serves on the Board and Directors of Northern Rivers Family Services, Inc. which provides services and supports to vulnerable children and their families in upstate New York and is a member of the Executive Committee and chair of its Audit and Compliance Committee. He also serves on the Foundation Board of Directors for the Northeastern Association of the Blind at Albany (NABA). Mr. Mascali is a graduate of St. John's University (1973) and its law school (1976).

Mr. Mascali has lectured at a number of NYSBA and NAELA sessions dealing with planning issues for the elderly and for individuals with special needs and their families and care givers and has authored and co-authored a number of articles on these and related issues. In 2014, Mr. Mascali was honored with the New York State Bar Association President's Pro Bono Service Award for the 3rd Judicial District and the Albany Law School Pro Bono Program's Service Award. He was recognized for his work spearheading the first Albany Law School Special Needs Planning Day and his involvement with Senior Citizens Law Day and Veterans Law Day.



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TRUST & ESTATE PLANNING

ELDER LAW

SPECIAL NEEDS ESTATE PLANNING

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### TARA ANNE PLEAT, ESQ.

**“AV” rated by Martindale-Hubbell---the highest rating for expertise and ethics given by the independent rating service of the legal profession.**

TARA ANNE PLEAT, Esq., co-owns the law firm Wilcenski & Pleat PLLC. She practices in the areas of special needs estate planning and administration, traditional estate planning and administration, long-term care planning, and elder law. Tara graduated cum laude from Albany Law School with honors in the Estate Planning concentration and earned her undergraduate degree from the State University of New York at Albany. She is admitted to practice in New York, Florida, and Massachusetts as well as the United States Tax Court and the U.S. Federal District Court in the Northern District of New York.

Tara is co-chair of the Special Needs Planning Committee of the Elder Law Section of the New York State Bar Association and is a member of the Taxation Committee of the Trusts and Estates Law Section. Tara is the vice-chair of the publications committee of the Elder Law Section of the New York State Bar Association which publishes the Elder and Special Needs Law Journal on a quarterly basis. She was recently elected as incoming Treasurer of the Elder Law Section of the New York State Bar Association. She is honored to be a member of the Special Needs Alliance, an invitation-only, national network of leading attorneys dedicated to the practice of disability and public benefits law.

Tara is the Immediate Past President of the Board of Directors of the Estate Planning Council of Eastern New York, and serves as vice-president of the Board of Directors of Domestic Violence and Rape Crisis Services of Saratoga County. In addition, Tara is a graduate of the 2006 class of Leadership Saratoga, sponsored by the Saratoga Springs Chamber of Commerce, and currently is a member of the Leadership Saratoga Advisory Board. Tara is a Member of the Board of Directors of AIM Services, Inc., a disability service organization based in Saratoga Springs, New York and recently joined the Board of Directors of the Wesley Foundation.

In the fall of 2012, Tara was appointed as an adjunct professor of law at Albany Law School, where she teaches a course in the spring semester on estate and financial planning for the elderly and individuals with special needs.

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**Daniel R. Santola, Esq.**  
**Powers & Santola, LLP**  
**39 North Pearl Street**  
**Albany, New York 12207**  
**518-465-5995**



Daniel R. Santola is a senior partner and co-founder of Powers & Santola, LLP, a firm which has consistently been given the highest ranking by U.S. News and World Report/Best Lawyers. His practice is limited to the representation of catastrophically injured individuals, the field of law in which he has over 35 years experience. Born in Syracuse, New York, Dan received his undergraduate degree in Economics from the University of Buffalo in 1971.

After graduating from Albany Law School, he was an assistant professor at Rensselaer Polytechnic Institute School of Management in Troy, New York, until 1976, when he decided to concentrate his legal efforts in the field of personal injury law.

In 1987, he and longtime friend and colleague, John K. Powers, decided to form the firm of Powers & Santola, LLP.

Dan has achieved several awards of distinction. He has consistently been named as one of the “Best Lawyers in America” and is listed by the American Trial Lawyers Association as one of the top 100 trial lawyers. He was named as “Lawyer of the Year” for 2012 and again in 2014 for Medical Malpractice Law by Best Lawyers.

Dan has spent more than 30 years teaching various topics within the field of personal injury law, covering subjects such as construction accidents, medical malpractice, trial tactics, evidence and products liability. He has lectured for the Office of Court Administration in its Continuing Legal Education programs for judges and court attorneys, the New York State Academy of Trial Lawyers, the New York Trial Lawyers Association and served on the State Bar Association.

**EDWARD V. WILCENSKI, ESQ.**

**Wilcenski & Pleat, PLLC**

[www.WPLawNY.com](http://www.WPLawNY.com)

EDWARD V. WILCENSKI, Esq., is a co-owner and co-manager of the law firm of Wilcenski & Pleat, PLLC, with offices in Clifton Park and Glens Falls, New York. He practices in the areas of Elder Law, Special Needs Planning, and Trust and Estate Planning.

Ed is a Trustee of the NYSARC (formerly the New York State Association for Retarded Children) Pooled Trust, and serves as a Trustee of the Wildwood Programs Pooled Trust, a trust program serving individuals with developmental and learning disabilities. In 2009 and again in 2013, he received the Marie Ivancich Memorial Award from the Brain Injury Association of New York State for professional commitment to the organization's mission of advocacy for individuals living with brain injuries.

His professional affiliations include membership in the National Academy of Elder Law Attorneys, and the New York State Bar Association's Elder Law and Trusts and Estates Sections. He is a member and former President of the Special Needs Alliance, [www.specialneedsalliance.org](http://www.specialneedsalliance.org), an invitation only, not for profit organization of leading disability attorneys who practice in the areas of Special Needs Trusts and public benefits.

Ed is a contributing author to various publications of the New York State Bar Association, including Representing People with Disabilities, and Planning for Incapacity, and Guardianship Practice in New York State. He lectures frequently to attorneys, agency staff and families on elder law, special needs trusts and other legal issues.

He is a graduate of Albany Law School, and received his Bachelor of Science in economics, magna cum laude, from Siena College in Loudonville, New York.



## **SYRACUSE FACULTY BIOGRAPHIES**





**Joseph A. Greenman**  
**Member**

jgreenman@bsk.com

Syracuse, NY  
(315) 218-8178  
(315) 218-8100 fax

**Practice**

Trust and Estate

**Education**

Syracuse University College  
of Law (*cum laude*, 1974)  
Colby College (B.A., 1971)

**Bar/Court Admissions**

New York  
U.S. Supreme Court  
U.S. Court of Appeals for the  
Second Circuit  
U.S. District Court for the  
Northern District of New York  
U.S. District Court for the  
Western District of New York

## Joseph A. Greenman

Joseph counsels individual clients and business owners in estate and financial planning, estate administration, asset preservation and elder law matters. He has lectured extensively on probate and administration of estates, elder law and estate planning.

### Honors and Affiliations

- Listed in:
  - The Best Lawyers in America® 2015, Litigation - Trusts and Estates, Trusts and Estates - Elder, Estate Planning, Gift Planning, Probate, Special Needs, Succession Planning, Tax
  - Martindale-Hubbell®, AV Preeminent Rated
  - New York Super Lawyers 2014®, Estate Planning & Probate, Elder Law, Estate & Trust Litigation
- New York State Bar Association, Elder Law Section, Committee on Estates, Trusts and Medicaid; Co-Vice Chairman, Special Needs Subcommittee Elder Law Section; Trust and Estate Section; Past Chair, Estates & Surrogate's Court Committee
  - 2014 Co-Chair, Elder Law and Special Needs Section Summer Meeting, 8/7-9/14

### Other Activities

- President & Director, Jewish Home of CNY, Inc.
- Village Justice, Village of Manlius
- Director, Menorah Park Foundation
- Advisory Board, FM A Better Chance
- Past Director, CNY Estate Planning Council



## Cora A. Alsante

*Partner*



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Cora A. Alsante is the Leader of the Elder Law & Special Needs Practice and a partner in the Tax and Trusts & Estates Practices. She is also member of the Firm's Executive Committee. Ms. Alsante focuses her practice on estate planning, trusts, planning for the elderly and disabled, and estate and trust administration. She represents individuals and numerous assisted living and skilled nursing facilities.

Ms. Alsante frequently lectures for organizations such as the New York State Bar Association, Onondaga County Bar Association, Special Needs Alliance and Alzheimer's Association on topics including guardianships, supplemental needs trusts, estate planning, planning for the elderly and disabled, and estate and trust administration.

Ms. Alsante was instrumental in creating and establishing the Loretto Foundation Community Trust, a pooled supplemental needs trust, which benefits many seniors and disabled individuals in the community.

Ms. Alsante was named one of the "Top 25 Female Upstate New York Super Lawyers" for 2011 and 2013 and was selected as a *Best Lawyers in America* "Lawyer of the Year" in the area of "Litigation - Trusts and Estates" for 2015.

### PRACTICE AREAS

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- Elder Law & Special Needs
- Regulatory & White Collar Crime
- Trusts & Estates
- Health Care
- Tax

### RECOGNITIONS AND HONORS

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- Rated, AV Preeminent, Martindale-Hubbell
- Selected, *The Best Lawyers in America*, Lawyer of the Year, Litigation - Trusts and Estates (2015)
- Selected, *The Best Lawyers in America* (2009-2015)
- Selected, New York - Upstate, Super Lawyers (2008-2014)
- Selected, Top 25 Female Upstate New York Super Lawyers (2011 and 2013)

### PROFESSIONAL AND COMMUNITY ACTIVITIES

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- Fellow, American College of Trusts & Estates

- President, New York Chapter of the National Academy of Elder Law Attorneys (NAELA)
- Executive Committee Member, New York State Bar Association, Trusts and Estates Section
- Member, Special Needs Alliance
- Member, Onondaga County Bar Association
- Member, PACE CNY, Board of Trustees
- Member, Loretto Foundation, Board of Trustees
- Past Member, CNY Women's Bar Association, Judicial Screening Committee
- Past President, New York Chapter of the National Academy of Elder Law Attorneys
- Past Chair, New York State Bar Association, Elder Law Section
- Past Member, New York State Bar Association, CLE Committee

## SPEAKING ENGAGEMENTS

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- NYSBA, "Utilizing Supplemental Needs Trusts for Persons with Disabilities" (May 2015)
- NYSBA Trusts and Estates Law Section Spring Meeting (April 2015)
- Second Annual Advisors to Small Business Symposium (June 2014)
- Estate & Long Term Care Planning Breakfast Club, "Hot Topics in Long-Term Care Planning: An Interactive Discussion" (May 2014)
- New York State Bar Association, "Article 81 of the Mental Hygiene Law" (June 2013)
- Hancock Estabrook's Annual Advisors to Small Business Symposium (June 2013)
- 2013 Elder Law Fair, "Estate Planning for Special Needs" (May 2013)
- Elder Law Fair (May 2012)

## PRESS AND PUBLICATIONS

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- ["How to Plan Financially for Children with Special Needs", WCNY's Financial Fitness TV, December 2014](#)

## EDUCATION

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- University at Buffalo Law School, J.D., 1988
- Hamilton College, B.S., academic honors, 1985

## ADMISSIONS

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- New York

Alyssa M. Barreiro, Esq.  
Vice President  
Senior Trust Counsel  
Tompkins Trust Company

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Alyssa joined Tompkins Trust Company as Vice President and Senior Trust Counsel in its Central New York Region following over 20 years of private law practice in Binghamton, New York. Most recently she was a partner at Levene Gouldin & Thompson, LLP and before that, a partner at Hinman, Howard & Kattell, LLP. Her work focused on contested guardianship and trust matters as well as health care law, including nursing home representation. She is an appointed member of the New York State Office of Court Administration Guardianship Advisory Committee, and serves as New York State Bar Association Vice-President for the 6th Judicial District. She has been an active member of the NYSBA Health Law and Elder Law sections. She is also a member of the Finger Lakes Women's Bar Association. Her volunteer activities include the Surrogate Decision-Making Panel for the State of New York Commission on Quality of Care and Advocacy for Persons with Disabilities. Alyssa graduated from State University of New York at Binghamton and Syracuse University College of Law. She obtained a Master of Business Administration degree from Binghamton University School of Management.





**Christine Woodcock Dettor**

**Contact Information**

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**Practice Areas**

Not-For-Profit Organizations  
Trusts and Estates  
Health Care  
Professional Practices

**Education**

J.D., Syracuse University College  
of Law, 1996  
  
B.A., Wellesley College, 1992

**Admissions**

New York

Christine practices in the areas of not-for-profit organizations, trusts and estates, health care, professional practices, and elder law.

Christine represents not-for-profit organizations with regard to formation, federal and state tax matters and compliance, liability concerns, governance and the structuring of charitable gift planning to include the drafting of endowment funds, donor advised funds, charitable remainder trusts and other charitable planned giving vehicles.

Christine's trusts and estates and estate planning experience includes the planning and preparation of wills and trusts that anticipate tax, family management issues, discounting of gifts and transfers of assets to children and grandchildren. She assists clients in all aspects of the planning process, including the initial discussion of needs, anticipation of future issues, drafting and tailoring of documents, and completion of the plan, which may include deed transfers, changes in beneficiary designations and account transfers. She assists clients in all aspects of the probate process and with the transfers and funding of testamentary dispositions.

Christine represents elderly and disabled individuals in the area of elder law and provides guidance regarding supplemental needs trusts, asset protection, Medicaid planning and guardianship matters. Christine prepares living wills, health care proxies and durable powers of attorney as well as revocable and irrevocable trusts for her clients.

Christine's health law and professional practices experience includes advising physicians and hospitals on federal and state health care regulatory compliance, the incorporation and corporate governance of medical practices, the development of corporate compliance plans, the formation and merger and sale of professional practice groups, licensure issues, and risk management. She has served as general counsel for a rural hospital in Northern New York and for its Hospital Foundation since 2003 and handles medical staff, physician recruitment, Stark, and anti-kickback matters.

**Experience**

- Served as counsel to Metropolitan Development Association of Syracuse and Central New York, Inc. and the Greater Syracuse Chamber of Commerce, Inc. in the structuring and creation of CenterState Corporation for Economic Opportunity; secured CenterState's federal tax status; reviewed existing grants and contracts and related entities
- Served as Counsel to Board of Directors of not for profit organization with a focus on venture philanthropy; guided Directors with regard to organizational structure, compliance with New York and Federal Tax Laws; focused on development of strategic partnerships and compliance with private inurement and excess benefit transaction rules in setting executive compensation
- Negotiated and represented second generation family business owner with regard to acquisition, structure and buy out of first generation business
- Served as Counsel to not for profit organization with regard to the creation and management of subsidiary and supporting organization and relationship and between the two entities

# Christine Woodcock Dettor

## Community Involvement

Christine has served as Past Chair of the Central New York Community Foundation and currently serves on its Audit Committee and as Chair of its Professional Advisors Council. Christine serves on the Boards of Loretto Management Corporation and Manlius Pebble Hill School. She is a member of the New York State Bar Association's Audit Committee and serves as Co-Chair of the Charitable Organizations Committee of the Association's Trusts & Estates Section. Christine is a frequent lecturer on issues pertaining to tax exempt organizations, trusts and estates and charitable planning. Other community activities and volunteer services include:

- Syracuse Stage, Past Member, Board of Directors
- Literacy Volunteers of Greater Syracuse, Past Member, Board of Directors
- Auburn Public Theater, Past Member, Board of Directors
- Central New York Community Foundation, Past Chair of the Board of Directors Audit Committee Member and Co-Chair of the Professional Advisors Council
- Manlius Pebble Hill School, Member, Board of Trustees; Past Planned Giving Committee Member and Past Alumnae Board Member
- Loretto Management Corporation (Loretto) Board of Directors
- Leadership Greater Syracuse, Graduate, Class of 2003
- AARP Legal Services Network, Attorney Member
- Central New York Business Journal "40 Under 40" Award Recipient, 2006
- Friends of Jowonio, Past Board of Directors
- Central New York Chapter of the Autism Society of America, Past Board of Directors
- Wellesley College, Past Alumnae Admissions Representative

## Affiliations & Acknowledgements

- Awarded the designation of Accredited Estate Planner (AEP) by the National Association of Estate Planners and Councils
- New York State Bar Association, Co-Chair, Charitable Organizations Committee, Trusts & Estates Section, Executive Committee Member
- New York State Bar Association, Trusts & Estates, Health Law and Elder Law Sections, Executive Committee Member, Past Audit Committee Member
- Onondaga County Bar Association, Surrogates Court Committee
- Central New York Women's Bar Association
- Estate Planning Council of Central New York, Attorney Member
- Super Lawyer, New York State Edition





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**Practice**  
Trust and Estate

**Education**  
George Mason University  
School of Law (J.D., 2005)  
Hobart and William Smith  
Colleges (B.A., *magna cum*  
*laude*, 2000)

**Bar/Court Admissions**  
New York  
Colorado

## Aaron D. Frishman

Aaron practices in all areas of trusts and estates and elder law matters. He focuses his work in the areas of estate and tax planning, trusts, guardianships, estate and trust administration, Medicaid planning, and other elder law and public benefits matters. In addition to this focus, Aaron frequently provides legal assistance to personal injury attorneys pertaining to the protection of settlement proceeds.

Aaron has lectured to individuals and at state bar associations on numerous estate planning and elder law issues and has been published nationally by the National Academy of Elder Law Attorneys (NAELA). He recently became a member of the Public Benefits Panel of the NYSBA Elder Law Section.

### Honors and Affiliations

- New York State Bar Association, Trust and Estate Section; Elder Law Section
- Colorado Bar Association, Trust and Estate and Elder Law Section
- Onondaga County Bar Association, Volunteer Lawyers Project – Surrogate’s Court Legal Clinic Volunteer, 2013-Present; Volunteer Lawyers Project – Upstate Medical Center Legal Clinic Volunteer, 2014-Present
- National Academy of Elder Law Attorneys
- Phi Beta Kappa

### Representative Presentations

- “Drafting Supplemental and Special Needs Trusts,” NYSBA CLE: Advanced Document Drafting for the Elder Law Attorney, Moderator and Chair, Syracuse, NY, November 2013
- “Settling Personal Injury Actions: Structured Settlements, Settlement of Medicare and Medicaid Claims, the Medical Indemnity Fund for Neurologically Impaired Infants,” New York State Bar Association, Elder Law Section, Fall Meeting, October 2013
- “Special Needs Event,” Menorah Park, Syracuse, NY, August 2013
- “Advanced Directives,” Elder Law Fair, Syracuse, NY, May 2013
- “Basics of Elder Law Practice,” New York State Bar Association, Elder Law Section, Syracuse, NY, May 2013
- “Elder Law: Basics of Elder Law A-Z,” Law Review Seminar, Denver, CO, July 2012
- “Medicare Subrogation Rights in Personal Injury Settlements,” Colorado Bar Association, Denver, CO, 2007

### Representative Publications

- Frishman, Medicare Set-Asides in Personal Injury Cases: Is There a Standard Method of Practice?, NAELA Journal, Volume 8, No. 2, 2012

### Other Activities

- 2014 Syracuse "40 Under Forty" Award Winner
- Steering Committee Member, F.O.C.U.S. Greater Syracuse Age-Friendly, 2014-Present
- Jewish Federation of Syracuse Young Leadership Program, 2014-2015
- Committee Member, YMCA Camp Cory Alumni, 2013-Present
- Volunteer Member, Finance Committee, Alzheimer’s Association, Central New York Chapter, Sept. 2014-Present
- Member/Congregant, Temple Concord
- Partner/Volunteer, Social Venture Partners Denver, 2007-2010

**Emilee K. Lawson Hatch**  
**BOUSQUET HOLSTEIN PLLC**  
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Emilee Lawson Hatch is an Attorney and Member at Bousquet Holstein, PLLC. She concentrates her practice in the areas of estate planning, trust and estate administration, and estate and gift taxation. Offering the assurance of complete confidentiality and exceptionally responsive service, Emilee can put a client's mind to rest on all matters relating to trusts and estates law, as she helps them draft a comprehensive, strategic and highly-personalized plan that addresses their goals and wishes.

Emilee is a frequent lecturer and recently completed a three-year stint as the author of the Syracuse Law Review's Survey of New York Law. She was honored with the CNY Business Journal 40 Under Forty Award in 2014 and has been named a New York Super Lawyers Rising Star in 2013, 2014 and 2015. She received the Onondaga County Bar Association Volunteer Lawyer Project 2014 Distinguished Service Pro Bono Award. Emilee has most recently been honored as the 2015 NYSBA President's Pro Bono Service Award for the 5th Judicial District.

Emilee is an advocate for lifelong learning. She believes in providing opportunities for all people to have access to education and legal services. Emilee demonstrates her commitment to the CNY community through her work with many local charitable organizations. She also serves as a volunteer at the Crouse & Upstate Hospital Legal Clinic, Surrogate's Court Legal Clinic, Vera House Legal Clinic, and the "Say Yes to Education" Legal Clinics.

Emilee grew up in the mountains in Evergreen, Colorado. After she earned her Bachelor's degree, she traveled to New York where she received her J.D. from Syracuse University College of Law in 2008. Following law school, she obtained an LL.M. in Estate Planning from the University of Miami School of Law. Emilee is admitted to practice law in New York and Massachusetts. She has made her home in Syracuse with her husband, Ryan, and sons, Stuart and Lee.

**Anthony A. Marrone II**  
Attorney at Law  
The Marrone Law Firm, P.C.  
East Syracuse, New York

Anthony A. Marrone II focuses his practice and regularly appears in the news and gives public presentations in the areas of elder law, Medicaid, trust and estates, guardianships, and special needs planning.

His elder law practice focuses on Medicaid pre-planning including the use of trusts to assist clients in protecting assets in advance of incurring long-term care expenses. Mr. Marrone also provides crisis planning to clients who are already in the nursing home and have not implemented an advance plan. Even for these clients, Mr. Marrone is able to preserve a significant portion of their assets. Mr. Marrone also provides Medicaid application assistance and representation through all stages of the Medicaid application process, including fair hearings and appeals of Medicaid denials.

Through his trusts and estates practice, Mr. Marrone helps families protect, preserve, and efficiently transfer wealth. He uses the latest tax-savings strategies to avoid or minimize estate, gift and income taxes. This practice also includes the preparation of wills, trusts, health care proxies and powers of attorneys for individuals and families. Additionally, Mr. Marrone provides significant post-mortem planning for executors, trustees and estate fiduciaries, and has handled several will and trust contest proceedings.

Mr. Marrone's guardianship and special needs planning practice includes guardianship applications for disabled minors and adults, both with mental and physical impairments. Additionally, Mr. Marrone regularly prepares trusts for individuals with special needs and clients receiving large settlements seeking to preserve government benefit eligibility. This practice includes comprehensive representation in any legal proceedings and interfacing with Department of Social Services, Social Security Administration and other government agencies to coordinate benefits.

Prior to founding The Marrone Law Firm, P.C., Mr. Marrone practiced in the Estate and Elder Law department of a regional Upstate New York law firm.

