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## ATTORNEYS

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## Cora A. Alsante

*Partner*

P: (315) 565-4500 (ext. 4501)

F: (315) 565-4600

calsante@hancocklaw.com



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Cora A. Alsante's Bio

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", in Syracuse, NY, for 2015.

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PRACTICE AREAS

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## BIO

### VALERIE J. BOGART

**Director, Evelyn Frank Legal Resources Program**

**NEW YORK LEGAL ASSISTANCE GROUP**

7 Hanover Square, 18<sup>th</sup> fl., NY NY 10004

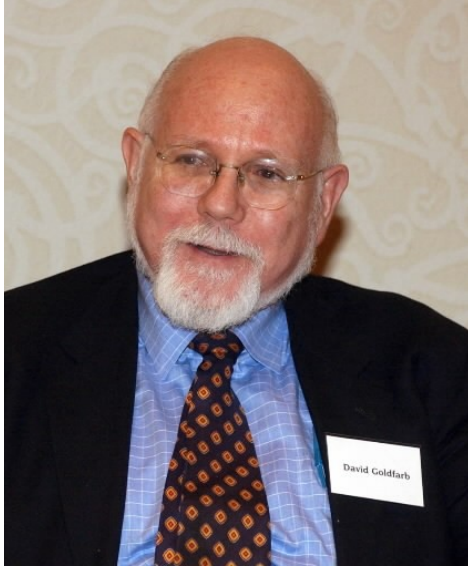
212-613-5074

[vbogart@nylag.org](mailto:vbogart@nylag.org)

[NYHealthAccess.org](http://NYHealthAccess.org)

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, a non-profit legal services organization. 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.





David Goldfarb is the managing partner of the law firm of Goldfarb Abrandt Salzman & Kutzin LLP. David is the co-author of the legal treatise *New York Elder Law* (formerly *New York Guide to Tax, Estate & Financial Planning for the Elderly*), (Lexis-Matthew Bender, 1999-2015). David was formerly an attorney and supervisor for the Civil Division of the Legal Aid Society in New York City. He has been listed in New York Super Lawyers since 2008. He has been included in The Best Lawyers in America in the specialty of Elder Law since 2010, and named Best Lawyers' 2014 New York City Elder Law "Lawyer of the Year." He has achieved the highest rating (AV) in Martindale-Hubbell.

David is a fellow of ACTEC. He is currently Chair Elect of the Elder Law & Special Needs Section of the New York State Bar Association. He was formerly Chair of the Legal Problems of the Aging Committee of the Association of the Bar of the City of New York. He has written extensively on civic and legal issues including two op-eds in the New York Times.

David was featured on August 22nd, 2003, in a "Public Lives" column in the *New York Times* and on August 26th 2003, in a column in the *Capital Times* (Madison, Wisconsin). His promotion of neighborhood and historic preservation on the World Wide Web has received extensive coverage including an article in *Preservation*, the Magazine of the National Trust for Historic Preservation and a Year 2000 Statewide Preservation Award from the Preservation League of New York State.

His firm's website is [www.seniorlaw.com](http://www.seniorlaw.com)





**Joseph A. Greenman**  
Member  
[jgreenman@bsk.com](mailto: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® 2016, Litigation - Trusts and Estates; Trusts and Estates
  - Martindale-Hubbell®, AV Preeminent Rated
  - New York Super Lawyers 2015®, Estate & Probate
- 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





**Hon. David H Guy** - Judge Guy has served as Broome County Surrogate Court Judge since January, 2011. In addition to Broome County Surrogate's Court, Judge Guy handles the Mental Hygiene Law Article 81 Guardianship matters throughout the 6<sup>th</sup> Judicial District and MHL Article 9 & 15 cases in Broome County. He serves on the New York State OCA Guardianship Advisory Committee. Before becoming Surrogate, Judge Guy was a partner with the Binghamton firm of Coughlin & Gerhart, LLP, where he practiced in the areas of estate planning and administration, elder law, real estate, business planning and taxation. Judge Guy received his BS from University of Rochester (1978) and JD from Albany Law School (1986). He is a member of the New York State and Broome County Bar Associations.



## SURROGATE PETER J. KELLY

Surrogate Kelly is a graduate of Iona College and St. John's University School of Law where he received his Juris Doctor degree in 1983.

Prior to his election to the bench, Surrogate Kelly was employed in the New York City Criminal and Civil Courts as a Law Assistant Trial Part with Hon. Phyllis Orlikoff Flug, He also served as Principal Law Clerk in Supreme Court, as well as Principal Law Clerk/Referee in Queens Surrogate's Court for Hon. Robert L. Nahman.

He was elected as a Judge of the Civil Court and as a Justice of the New York State Supreme Court in Queens County. In Nov. 2010 he was elected as Surrogate of Queens County and has served in that capacity since January of 2011.

In addition to his regular duties, Surrogate Kelly has served as an instructor for court clerks taking promotional examinations and frequently lectures at various bar associations and organizations including the Queens County Bar Association, the New York State Bar Association, and the Nassau County Bar Association.

Surrogate Kelly has been appointed to the Surrogate's Court Advisory Committee to the Chief Administrative Judge, and serves as Chair of the Executive Committee of the New York State Surrogate's Association. He is also a member of the Trust and Estates section of the New York State Bar association, the Queens County Bar Association, the Queens County Women's Bar Association, and the Queens Catholic Lawyer's Guild, serving as president from 1994 to 1998 and as Judicial Moderator since 2009. He is also a former member of the Board of Directors of the New York City Supreme Court Justices' Association and the New York City Civil Court Judges Association.

Surrogate Kelly is admitted to the New York State Bar as well as the United States District Court for the Southern District and the United States Supreme Court.





# ELDER LAW ASSOCIATES PA

**Howard S. Krooks, Esq., CELA, CAP**

HKrooks@ElderLawAssociates.com • [www.ElderLawAssociates.com](http://www.ElderLawAssociates.com)

Howard S. Krooks, a partner of Elder Law Associates PA with offices throughout Southeast Florida, is admitted to practice law in New York (1990) and Florida (2004). Mr. Krooks is Of Counsel to Amoruso & Amoruso, LLP, in Rye Brook, New York.

Mr. Krooks splits his time between New York and Florida, where his professional practice is devoted to elder law and trusts and estates matters, including representing seniors and persons with special needs and their families in connection with asset preservation planning, supplemental needs trusts, Medicaid, Medicare, planning for disability, guardianship, wills, trusts and health care planning with advance directives.

Mr. Krooks is certified as an Elder Law Attorney by the National Elder Law Foundation and is a Past President of the National Academy of Elder Law Attorneys (NAELA). He is also the current President of the New York chapter of NAELA. He is a Past Chair of the Elder Law Section of the New York State Bar Association (NYSBA). He was selected as a Florida Super Lawyer and a New York Super Lawyer (2007-2015). He was also named a Top 25 Westchester County Attorney (*New York Times* – Sept. 2012-2015). Mr. Krooks has a 10.0 (Excellent) rating from Avvo and is AV Preeminent<sup>®</sup> rated by Martindale-Hubbell, a testament that Mr. Krooks' peers rank him at the highest level of professional excellence.

Mr. Krooks received the Outstanding Achievement Award from the NY Chapter of NAELA in 2006 for serving as Co-Chair of a Special Committee on Medicaid Legislation formed by the NYSBA Elder Law Section to oppose NY Governor George Pataki's budget bills containing numerous restrictive Medicaid eligibility provisions that, if enacted, would severely impact the frail elderly and disabled populations. He was also recognized for serving as Co-Chair of the NYSBA Elder Law Section Compact Working Group, which received national attention for developing alternative methods of financing long-term care. Additionally, Mr. Krooks served as Chair of a Special Committee created by the NYSBA Elder Law Section to address the Statewide Commission on Fiduciary Appointments formed by Chief Justice Judith Kaye.

Mr. Krooks co-authored the chapter, "Creative Advocacy in Guardianship Settings: Medicaid and Estate Planning Including Transfer of Assets, Supplemental Needs Trusts and Protection of Disabled Family Members" included in *Guardianship Practice in New York State*, and the chapter "Long Term Care Insurance in New York" included in *Estate Planning and Will Drafting in New York*, both published by the NYSBA. He is widely published on many elder law topics. A former Adjunct Assistant Professor at New York University's School of Continuing and Professional Studies, Mr. Krooks taught Asset Protection Planning. He also served as an instructor for the NY Certified Guardian & Court Evaluator Training program.

Mr. Krooks is a Founding Principal of ElderCounsel LLC, the premier elder law and special needs planning document drafting solution for attorneys.

As a frequent lecturer, Mr. Krooks has addressed many organizations including NAELA, Stetson Special Needs Conference, ALI-ABA, ElderCounsel, WealthCounsel, the National Guardianship Association, the Florida Bar Association, the Academy of Florida Elder Law Attorneys, NYSBA, New Jersey Bar Association, North Carolina Bar Association, Utah Bar Association, Washington NAELA Chapter, the Pennsylvania NAELA Chapter, the Association of the Bar of the City of New York, UJA Federation, the Brooklyn Bar Association, the Queens County Bar Association, Berkeley College, the United Federation of Teachers and the New York State United Teachers, among others. Mr. Krooks has been quoted in *The Wall Street Journal*, *The New York Times*, *Kiplinger's*, *USA Today*, *The New York Post*, *Newsday*, *The Journal News* and the *Boca Raton News*. He has appeared on PBS, the CBS Early Morning Show and elder law focused local cable television programs.



### **Surrogate Nelida Malave-Gonzalez**

Nelida Malave-Gonzalez, elected Bronx Surrogate whose term began on January 2, 2013, is a Bronx native born to Puerto Rican parents from San Sebastian, Puerto Rico. She is the youngest of 11 children raised in the Morrisania Projects. Surrogate Malave-Gonzalez attended St. Augustine Parochial School in the Morrisania section of the Bronx and Cardinal Spellman High School in the Baychester area of the Bronx. The Surrogate graduated from Fordham University, Rose Hill Campus also located in the Bronx. Due to the absence of any law schools in the Bronx, she ventured over the bridge to Queens and obtained her law degree from CUNY Law School at Queens College.

Prior to being elected, first as a Civil Court judge in 2005, Surrogate Malave-Gonzalez worked in private practice for 13 years. In 2011 she was appointed as acting Supreme Court Justice. Before her tenure on the bench, Surrogate Nelida Malave-Gonzalez served the Bronx County as a general practice attorney advocating for clients in Family, Housing, Criminal, Surrogate's, Civil and Supreme Courts. During that time, she also served as an Administrative Law Judge on the NYC Environmental Control Board in the Bronx where she conducted hearings regarding quality of life issues for Bronx residents.

Throughout her tenure as a jurist, Surrogate Malave-Gonzalez has handled a variety of matters. While in Civil Court, Surrogate Malave-Gonzalez was one of the first "Hybrid" Judges assigned to both Civil Court and Supreme Court simultaneously. As a "Hybrid" Judge, she continued her Civil Court duties which included presiding in every part of the Court including Small Claims, No-Fault, Consumer Credit Transactions and Commercial Landlord-Tenant while assuming responsibility for Supreme Court summary jury trials and foreclosure matters. During her tenure in Civil Court, she was assigned to Bronx Family Court to hear Juvenile Delinquency

cases which also required presiding over neglect of children, custody and visitation applications that could lead to the termination of parental rights.

As Acting Supreme Court Justice, Surrogate Malave-Gonzalez was assigned to the Matrimonial Part where she worked tirelessly to ensure justice while providing a neutral but empathetic environment for the Bronx litigants. Simultaneously, she was assigned to the Mental Hygiene Article 81 Part where her decisions had a direct effect on seniors, persons with disabilities, and/ or incapacitated individuals, all of whom needed their interests protected. In addition, as a “Hybrid” Judge, and as an Acting Supreme Court Justice, Surrogate Malave-Gonzalez also sat in the Arraignment Part of the Criminal Court of Bronx County and her quarterly weekend assignment to Criminal Court required her to consider the implications of immigration, civil and estate issues on the accused.

Throughout the years, this experience prepared Surrogate Malave-Gonzalez to fully understand the needs of the people of the Bronx and their communities. As the first female and first Latina elected Surrogate, she continues to serve the Bronx with due diligence and in a fair and impartial manner while remaining sensitive to the plight of its citizens.



# Robert P. Mascali, Esq.

Robert Mascali is a senior counsel at the Center for Special Needs Trust Administration, Inc. which is a national nonprofit organization that administers supplemental needs trusts. Mr. Mascali is based in Albany, New York and is responsible for the New York and New England markets for The Center. In addition, Mr. Mascali is “of counsel” with the law firm of Pierro Schaeffer & Connor, LLP in Latham, New York and concentrates in the areas of Special Needs Planning for persons with disabilities, Long-Term Care Planning, and Estate Planning. Mr. Mascali previously served as the Associate General Counsel at NYSARC, INC. and served as Counsel to NYSARC Trust Services. 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).

Mr. Mascali is a member of the New York State Bar Association and its Elder Law and Special Needs and the Trusts and Estates sections. He serves on the Executive Committee and is Co-Vice Chair of the Special Needs Planning and the Legislation Committees of the Elder Law and Special Needs Section. In 2013, Mr. Mascali was elected as the Third District Representative for the Elder Law Section to the NYSBA House of Delegates. In May 2014, Mr. Mascali received the *President’s Award* from the New York State Bar Association and the Albany Law School *Pro Bono Service Award* for his pro bono services and in October 2015 he was honored for his achievements during the American Bar Association’s National Pro Bono Access to Justice Recognition Ceremony.

He is a member of the Academy of Special Needs Planners and the National Academy of Elder Law Attorneys (NAELA), a member of the Board of Directors of the New York Chapter of NAELA and currently serves as President-elect. 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 of 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 Strategic Initiatives Committee. He is also a member of the Board of Directors of the Northeastern Association of the Blind Foundation, Inc.

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.



# BLEAKLEY PLATT



## Frances M. Pantaleo

### Partner

Ms. Pantaleo is the head of our Elder Law Practice Group. Prior to joining the firm, Ms. Pantaleo was a partner at Walsh Amicucci & Pantaleo LLP in Purchase, New York; of counsel to Keane & Beane, P.C. in White Plains, New York, an associate clinical professor at the Benjamin N. Cardozo School of Law and an adjunct professor at Pace Law School, where she developed and taught a course on elder law.

Ms. Pantaleo handles a broad range of matters with a particular emphasis on elder law, special needs planning, guardianship proceedings under Article 81 of the Mental Hygiene Law and Article 17A of the Surrogate's Court Procedure Act, drafting and administration of special needs trusts, estate planning, drafting of wills and trusts, and estate administration.

### Education

- | New York University Law School (J.D., 1979)
- | City University of New York's Brooklyn College (B.A., 1977) (summa cum laude)

### Bar Admissions

- | New York
- | U.S. District Courts for the Eastern and Southern Districts of New York
- | U.S. Court of Appeals, Second Circuit

### Memberships

Ms. Pantaleo is the former Chair of the Elder Law and Special Needs Section of the New York State Bar Association and a member of the Trusts and Estates Section. She is a member of the National Academy of Elder Law Attorneys and is a member and has served as past-chair of the Elder Law Committees of the Westchester Women's Bar Association and the Westchester County Bar Association. She is co-author of a chapter on elder law in General Practice in New York, published by the West Publishing Company.

Ms. Pantaleo has an AV rating from Martindale-Hubbell and has been voted a Super Lawyer in the area of Elder Law since 2011. She was named one of the top 25 lawyers in Westchester County in Westchester Magazine in 2011 and 2012.

Ms. Pantaleo serves on the Board of Directors of the Hudson Valley/Rockland/Westchester Chapter of the Alzheimer's Association. 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 is a Fellow of the New York Bar Foundation.

T: (914) 287-6113  
F: (914) 683-6956

### Practices

- | Trusts and Estates

#### NEW YORK

One North Lexington Avenue  
PO Box 5056  
White Plains, NY 10602  
Main 914.949.2700  
Fax 914.683.6956

#### CONNECTICUT

Twenty-Five Field Point Road  
Greenwich, CT 06830  
Main 203.422.5050  
Fax 203.422.2345

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please visit our website at

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

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# BLEAKLEY PLATT

Ms. Pantaleo is a frequent lecturer at Continuing Legal Education programs which provide training to attorneys regarding elder law and special needs planning. She also makes frequent presentations on these topics to community organizations, consumers and non-legal professionals at the request of organizations such as the Alzheimer's Association, AARP, UJA- Federation, the Pace Women's Justice Center, Westchester Arc, the Public/Private Partnership for Aging Services and the Westchester County Department of Senior Programs and Services.

## Professional Recognition

- | New York Super Lawyers, 2014, 2015
- | The Best Lawyers in America,® 2015, 2016, Elder Law

**HON. BRANDON R. SALL**  
Surrogate, Westchester County  
Richard J. Daronco  
Westchester County Courthouse  
111 Dr. Martin Luther King, Jr., Blvd.  
White Plains, NY 10601  
(914) 824-5658  
[bsall@nycourts.gov](mailto:bsall@nycourts.gov)

## **PROFESSIONAL EXPERIENCE**

<b>6/2015-Present</b>	<b>Surrogate - Westchester County</b> Elected Surrogate - Westchester County - 11/2015 Appointed Surrogate - Westchester County by Governor Cuomo - 6/2015
<b>2014-5/2015</b>	<b>Sall, Geist, Schwarz &amp; Jellinek PLLC, Managing Member, White Plains, NY</b>
<b>2012-2014</b>	<b>Sall &amp; Geist, Partner, White Plains, NY</b>
<b>2004-5/2015</b>	<b>Gellert &amp; Rodner, Partner, White Plains, NY</b>
<b>2002-2011</b>	<b>Schuman Sall &amp; Geist, Partner, White Plains, NY</b>
<b>1992-2002</b>	<b>Schuman &amp; Sall, Partner, White Plains, NY</b>

As partner in these firms, I have specialized in trusts and estates, real estate law, tax certiorari, litigation, and transactional work, representing numerous cooperatives, condominiums, and homeowners' associations, other business entities, and individuals, and have been general counsel to the Westchester County Public Administrator since 2002.

### **1991-1992 Law Offices of Brandon R. Sall, Yonkers, New York**

As a sole practitioner, I specialized in trusts and estates, real estate law, litigation and transactional work, representing cooperatives and condominiums, other business entities and individuals.

### **1988-1990 Rothschild, Esposito, Himmelfarb, Sher & Pearl, White Plains, New York**

As an associate, I specialized in real estate, litigation and transactional real estate, including preparation of condominium and cooperative offering plans.

### **1986-1988 Jacobs, Sieratski & Zinns, New York, New York**

As an associate, I handled real estate litigation, including landlord-tenant matters.

## **PUBLIC SERVICE**

<b>2008-5/2015</b>	<b>Board Member-New York State Thruway Authority</b>
<b>2013-2014</b>	<b>Committee Member-Mass Transit Task Force that recommended transit proposal for I-287 corridor</b>
<b>2012</b>	<b>Chairman- Blue Ribbon Selection Committee that selected contractor for new Tappan Zee Hudson River Crossing Project</b>

## **PROFESSIONAL MEMBERSHIPS AND ACTIVITIES**

Admitted to New York, New Jersey, Connecticut and Florida Bars

Member, New York State Bar Association, Cooperative and Condominium Subsection, Trusts and Estates Section, and Trusts and Estates Litigation Committee, Real Property Section, and Westchester County Bar Association.

Lecturer on Estate Administration, New York State Bar Association, Continuing Legal Education Program

## **EDUCATION**

Benjamin N. Cardozo School of Law, New York, New York, JD. 1985

University of Miami, Miami, Florida, B.B.A., 1982

## **PUBLICATIONS**

**Estate of Gordon, 2008-1716/D** - NYLJ, September 4, 2015, pg. 21, col. 2;

**Matter of Dorrie E. Miller** - 2015 NY Slip Op 52498(U); NYLJ, October 15, 2015, pg. 23, col. 3; NYLJ, October 23, 2015, pg. 21, col. 3;

**Estate of Pernicone** - NYLJ, November 16, 2015, pg. 17, col. 3;

## About David A. Smith, Esq.

**David A. Smith** is an attorney with more than thirty-five years' experience in civil litigation. From 1979 to 1981, Mr. Smith was the Attorney In Charge of the New York State Attorney General's Plattsburgh Regional Office. In 1981, he opened the New York State Attorney General's first Nassau County Office, which he ran until 1987, when he entered private practice at Meyer, Suozzi, English & Klein.

In early 1996 Mr. Smith founded The Law Office of David A. Smith, PLLC which is located at 500 Old Country Road, Suite 109, Garden City, New York 11530, phone number (516) 294-3701.

Mr. Smith and his associates have a civil litigation, elder law and disabilities law practice in which they focus on representing individual clients in guardianship proceedings, contested guardianship litigation, estate planning, estate administration, contested estate litigation, Medicaid planning, application and fair hearings, Mental Hygiene Law retention and outpatient treatment cases, "right to die" cases, and general civil litigation. Mr. Smith also serves as counsel to prominent members of the medical malpractice and personal injury bar in connection with the resolution of Medicaid liens and other claims against plaintiffs' settlement or judgment proceeds and, where necessary, coordinating proceedings for appointment of a guardian with the settlement proceedings .

Mr. Smith also has lectured often at Bar associations and law schools on these subjects, as well as the subject of contested Mental Hygiene Law Article 81 guardianship proceedings. He authored the "Contested Guardianship Proceedings" chapter in the New York State Bar Association treatise Guardianship Practice in New York State.

Mr. Smith has also litigated many "right to die" cases including New York's "Baby Jane Doe" case. For more than twenty-five years, he has lectured to professional and lay groups throughout the country concerning medical treatment decision-making for patients unable to make their own decisions. He also has appeared on numerous television programs, including the "Today Show", "NBC Dateline", CNN programs and Court TV programs to discuss these issues.

Mr. Smith is a member of the New York State and Nassau County Bar Associations. He is also a past President of the Board of Directors of the Mental Health Association of Nassau County. He is a graduate of Hofstra University and the George Washington University School of Law.





Hon. Stacy L. Pettit, Surrogate  
Albany County Surrogate's Court  
Albany County Courthouse, Room 123  
Albany New York 12054  
518-285-8585

Stacy Pettit is a graduate of Vassar College and Albany Law School. She began her legal career working for 16 years in private practice, concentrating in trust and estate planning, probate and administration, and Surrogate's Court practice. While in private practice, she served area Surrogate's Courts as a guardian ad litem for parties under disability, and as the examiner of guardianship accounts.

She began working in the New York State court system in 1999, when she became a part-time law clerk in Albany Surrogate's Court while still in private practice. She became a full-time court employee as the Chief Clerk of Surrogate's Court in 2001. In March 2012, she joined the Appellate Division, Third Department as a principal appellate court attorney. On January 1, 2015, Judge Pettit's term as the Surrogate of Albany County began, after having been elected in November of 2014. Prior to election, she was honored to be rated "Highly Qualified" for the position by the NYS Independent Judicial Election Qualification Commission.

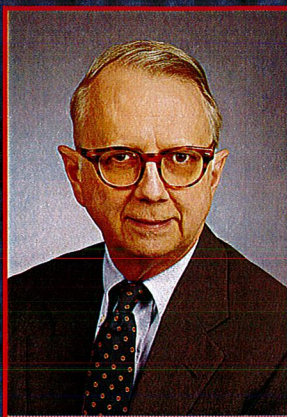
She has been an active member of the New York State Bar Association throughout her career, serving as the chair of the committee on Surrogate's Court of the Trusts & Estates section, as a district representative and member at large of the section's executive committee, and as a delegate to the New York State Bar House of Delegates. She served as Vice President of the New York State Surrogate's Court Chief Clerks' Association, and as a member of the New York State Surrogate's Court Law Association. She has also served on the Office of Court Administration's Surrogate's Court Examination Committee and Forms Committee. She has presented seminars and written articles for the New York State Bar Association for over twenty years, and for the Office of Court Administration, the New York State Surrogate's Court Clerks' Association, the New York State Legislature and the Supreme Court Appellate Division, Third Department, in addition to other organizations.

Married for more than 30 years, Stacy and her husband have three adult sons.



## AREAS OF PRACTICE

- Elder Law/Long Term Health Care and Medicaid Planning
- Health Care
- Estate and Trust Administration
- Guardianships
- Estate and Trust Litigation



**PHONE:** 585-987-2858

**FAX:** 585-987-2958

**EMAIL:** rreixach@woodsoviatt.com

## EDUCATION

- Harvard Law School, J.D.
- Yale College, B.A.

# ❖ RENÉ H. REIXACH, JR. ❖

## AT A GLANCE

René H. Reixach, Jr. is a partner in the firm's Elder Law and Health Care Practice Group and responsible for handling all elder law and health care issues.

Mr. Reixach received his J.D. degree from Harvard Law School, and his B.A. degree from Yale College.

Prior to joining Woods Oviatt, Mr. Reixach was the Executive Director of the Finger Lakes Health Systems Agency, a health planning agency covering a nine county region of western New York. In this capacity, he oversaw the local input to the State Department of Health process for planning and review of the development of the health facility services in this area.

## REPRESENTATIVE MATTERS

### Elder Law Representation:

- Successfully represented Medicaid applicants in federal court litigation in New York, Connecticut and Pennsylvania, including an appeal to the United States Court of Appeals for the Second Circuit:
  - Morenz v. Wilson-Coker, 415 F.3d 230 (2d Cir. 2005)
  - Robbins v. DeBuono, 218 F.3d 197 (2d Cir. 2000)
  - VerDow v. Sutkowy, 209 F.R.D. 309 (N.D.N.Y. 2002)
  - Mertz v. Houstoun, 155 F. Supp. 2d 415 (E.D.Pa. 2001)
- Established rules favorable to Medicaid applicants throughout New York State through administrative hearings affirmed on review by the Supervising Administrative Law Judge, e.g., Appeal of Arnold S., establishing that retirement accounts, including IRAs, owned by a Medicaid applicant in a nursing home, are exempt resources so long as they are in periodic payment status.
- Represented amicus curiae in successful litigation establishing that guardianships for Medicaid planning are appropriate under New York law. Matter of Shah, 95 N.Y.2d 148, 733 N.E.2d 1093, 711 N.Y.S.2d 824 (2000).

### Health Law Representation:

- Successfully represented large primary care medical group in contract dispute with HMO over change in contract terms by HMO during contract term. Buffalo Family Practice Medical Associates, P.C.v. Individual Practice Association, 256 A.D.2d 1230, 683 N.Y.S.2d 457 (4th Dept. 1998).
- Successfully defended large medical group against federal government claims of millions of dollars of over billing to Medicare and potential False Claims Act liability, resulting in favorable settlement for a small fraction of alleged overpayments.
- Represented multi-disciplinary group in establishment of health care management organization to negotiate with local insurers and HMOs.

## RENÉ H. REIXACH, JR. *continued*

### COMMUNITY INVOLVEMENT

Among Mr. Reixach's civic and charitable involvements are serving as a board member of the Wesley Group, a Rochester long term care community, and he is past president of the Foundation of the Monroe County Bar.

### BAR ADMISSIONS

Mr. Reixach is admitted to practice in the State of New York, all federal district courts in New York, the United States Court of Appeals for the Second Circuit and the Supreme Court of the United States.

### PROFESSIONAL AFFILIATIONS

Mr. Reixach is a member of the Monroe County, New York State and American Bar Associations.

He is a member of the American Health Lawyers Association and a Fellow of the National Academy of Elder Law Attorneys. Mr. Reixach also has served on many advisory committees, including the New York State Department of Health Certificate of Need Reform Advisory Committee, and the Community Coalition for Long Term Care.

### OTHER

Mr. Reixach authors a monthly health column in the Rochester Business Journal and has written for other professional, trade and business publications. He has lectured frequently on health care topics, including Medicaid litigation, Medicaid eligibility and health planning for the New York State Bar Association, the National Academy of Elder Law Attorneys, National Business Institute, the University of Rochester, Rochester Institute of Technology, and Cornell Law School. He also appeared as an expert witness on Medicaid eligibility for the New York State Supreme Court.

Mr. Reixach is listed in the current edition of "The Best Lawyers in America" and was named the "Lawyer of the Year for Healthcare for 2011" by the "Best Lawyers in America" publication.

Michael P. Ryan

Michael P. Ryan joined Jaspan Schlesinger LLP in their Trusts and Estates Department in January 2015. He was previously a partner at the firm of Cullen and Dykman in Manhattan and was the chair of their Trusts and Estates Department. Before that, he had a long career as a member of the Surrogate's Court staff and as a lecturer on a variety of topics related to trusts and estates. He had been Chief Clerk Referee of the Nassau County Surrogate's Court since 2005. Prior to his tenure as Chief Clerk, he was a Court Attorney Referee in the Surrogate's Law Department.

Aside from his passion for trusts and estates litigation, Mr. Ryan loves to teach and is an Adjunct Professor of Law in the Taxation LL.M. program. He teaches courses in trust and estate litigation and federal gift and estate taxation to LL.M. and J.D. candidates. He has published an article for the New York State Bar Association titled, "Post Mortem Estate Planning Using Qualified Disclaimers." He has been a contributing editor for the LexisNexis Corporation since 2001. His responsibilities there included review and updating of several Matthew Bender publications, such as Warren's Heaton on Surrogate's Court Practice, New York Civil Practice (Weinstein, Korn and Miller), Bender's Forms for the Civil Practice, and Practical Solutions for New York Lawyers. LexisNexis has published his article in Warren's Heaton Legislative Digest titled "Virtual Representation, A Primer." He is a frequent speaker and lecturer at various bar associations, court conferences, etc.

Michael Ryan was admitted to practice in 1980 in New York and in the United States District Courts for the S.D.N.Y and E.D.N.Y. Mr. Ryan received his B.A. from the University of Notre Dame and his J.D. from Fordham University School of Law.

He is married to Linda Murray Ryan, Esq., retired Assistant Dean and Research Professor at St. John's Law School. He is also the father of two wonderful sons. Finally, he is never bored and is passionately interested in everything, from jazz to history to opera to tennis and Notre dame football.

Last but not least, Michael Ryan is inordinately proud of having been born and raised in Brooklyn, New York.



**Richard A Weinblatt**

*Attorney at Law*

Richard A. Weinblatt is a partner in the law firm of Haley Weinblatt & Calcagni, LLP located in Islandia, New York. He practices primarily in the areas of Elder Law and Trusts and Estates. Richard graduated *magna cum laude* from St. John's University School of Law in 1988. He is a member of the New York State Bar Association, National Academy of Elder Law Attorneys and a former Director of the Suffolk County Bar Association. He is the Immediate Past Chair of the New York State Bar Association's Elder Law and Special Needs Section. Richard is a past Associate Dean of the Suffolk County Bar Association's Academy of Law, past President of the Estate Planning Council of Long Island, Suffolk Chapter and is a former Co-Chair of the Suffolk County Bar Association's Elder Law Committee, Surrogate's Court Committee and Tax Committee. Richard is also an adjunct professor at Touro College Jacob D. Fuchsberg Law Center.

