FACULTY BIOGRAPHIES

OVERALL PLANNING CHAIRS AND MODERATORS

SYLVIA E. DI PIETRO, ESQ., LLC

55 West Fourteenth Street Suite 4H, New York, NY 10011 (212) 242-8800, fax (212) 633-6298

Website: *sylviadipietro.com* E-mail: *femalelitigator@yahoo.com*

Sylvia E. Di Pietro, Esq., LLC provides representation in the area of Elder Law, Article 81 and Article 83 Guardianship petitions and advocacy and related contested accounting and trust matters. The Firm also provides a full range of services with respect to probate, contested probate, complex trust litigation; and administration. The firm also focuses on negotiation and drafting of Risk Management Contracts in the Television, Music and Entertainment Industries.

Sylvia has also been appointed referee and receiver in real estate and guardianship matters. She is a member of the Guardianship Advisory Committee of the New York State Supreme Court, New York County. In 2013, Sylvia taught the first certified course in Elder and Article 81 Guardianship Law as an Adjunct Professor of Law at Brooklyn Law School.

In September 20, 2013, Sylvia was awarded by New York County Lawyers Association the Jack Newton Lerner Award for Excellence in the Contribution of CLE Training. Among the positions she presently holds are Chair of the Elder Law Section, former Vice Chair of the Estates Trusts Section, and present Chair of the CLE Committee for the New York State Bar Association, Trusts and Estates Section.

PRIOR LAW-RELATED EXPERIENCE

Official Court Reporter – Supreme Courts of State of New York, Queens County & Kings County

CORPORATE / EXECUTIVE EXPERIENCE

FORSYTHE INTERNATIONAL LTD., New York, NY – **President of Sales**
Managed a sales force in Premium Incentive and Advertising Specialty industries, promoting creative ideas to Fortune 500 companies. Clients include IBM, TRW, Iams, JC Penny, Shell Oil, Blue Cross/Blue Shield, Deluxe Checking, First Federal Savings, The Guardian, Iowa Film Office, Hyatt, Goldman Sachs & SW Bell Telephone

SYLVIA DI PIETRO CONSULTING, New York, NY
Specialized in the creation and implementation of new business concepts for start-up companies. Developed new businesses; researched and marketed intellectual properties. Created all aspects of public relations, media placement advertising and sales promotional campaigns for celebrity clients. Clients include Princess Elizabeth of Yugoslavia, The Medici Archives, Anthony Quinn, Michael Bolton & Sir John Mills.

SYLVIA E. DI PIETRO, ESQ. : BAR ASSOCIATION & LAW RELATED ACTIVITIES

New York Women's Bar Association

- *Vice President, 2007-08, 2008-09*
- *Recording Secretary, 2006-07*
- *NYWBA Delegate* to Network of Bar Leaders, 2007-08, 2008-09
- *NYWBA Delegate* to Women's Bar Association of the State of New York Board of Directors, 2008-09; previously served as an alternate *Delegate* to WBASNY Board of Directors Meetings (*e.g.*, 9/05, 11/05)

- *Member*, 2007 NYWBA Annual Dinner Committee
- *Co-Chair*, Women's History Month 2007, Commerce Bank Reception Honoring Phyllis Gangel-Jacob
- *Chair and Moderator*, NYWBA Seminar: "Improving Your Employment Potential," 2007
- *Co-Chair,* The Ins and Outs of Financing of Marital Homes In Divorce," American Home Mortgage October 2007
- *Co-Chair*, Inauguration of the Litigation Committee, Commerce Bank Reception, October 2007
- *Event Chairperson*, NYWBA & Three Other Women's Bar Associations, Judith Ripka Private Shopping Event, December 2007
- *Co-Chair*, NYWBA Judges' Reception, January 2008
- *Member,* 2008 Annual NYWBA Dinner Committee
- *Chair,* Saks Fifth Avenue Extravaganza November, 2008
- *Contributing Writer*, NYWBA Newsletter, "What It's Really Like to Practice Law in NYC as a Woman," Summer 2008
- *Co-Chair,* NYWBA Judges' Reception, January 2009
- Organized and promoted NYWBA CLE program, "Ethics Update" March 19, 2009
- *Member,* Committee on Trusts and Estates, 2006 to present
- *Speaker,* Elder & Disabilities Committee, "Role and Responsibilities of Trustees of Supplemental / Special Needs Trusts" - Thursday, January 31, 2013

New York County Lawyers Association- Member of the Board of Directors

- *Board Member,* Appointed to the NYCLA Board of Governance, May 2009-May 2013
- *Delegate to the NYSBA House of Delegates,* May 2009 to May 2013
- Member- NYCLA Foundation, Fundraising Committee to present
- *Chair*- Estates Trust Section 2008-2010. Duties include membership, "Meet & Greets," development and sponsorship of NYCLA & Section CLEs 2008-2010.
- *Vice-Chair*- Estates Trust Section 2008-2014. Duties include membership, "Meet & Greets," development and sponsorship of NYCLA & Section CLEs 2010 to present.
- *Chair*-Elder Law Section 2013 to present. Duties include membership, "Meet & Greets," development and sponsorship of NYCLA & Section CLEs 2013 to present.
- *Delegate* to Network of Bar Leaders as Representative for President, Ann P. Lesk, 2009-10.
- Member, Communications Committee
- Member Continuing Legal Education Committee
- Member Library Committee
- Past *Chair* of Real Property Section 6/2004-6/2008, *Co-Chair* of Committee on Condos & Coops *6/2004 to 6/2007.* Duties include membership, "Meet & Greets," development and sponsor of Bar Association & Section CLEs; creator, NYCLA Express Real Estate Online Forms.
- Member-Section on Trusts & Estates; Member-Legislative Committee; prepared Section Legislative Report
- Speaker, CLE Seminar, Blueprint for Building Your Practice October 28-29, 2005, October 20-21, 2006
- *Chair*, "The Great Debate over the City's West Side Stadium," March 2005
- *Chair, Citywide Bar Reception:* Christine Quinn Reception 2006
- *Chair ,* Estates Trusts Section*:* Ruth Lewinson Memorial Lecture, March 2009
- Speaker, CLE Seminar, Detecting Forgery, May 2009
- Member, NYCLA Board Committee on Communications
- Member, NYCLA Board, Committee on CLE
- Speaker, CLE Seminar, Bridging the Gap, topic: "Probate," August 2009
- Mentor, NYCLA Task Force on Professionalism, August 2009
- Speaker, CLE Seminar, Ethics in Trusts and Estate Transactions, September 2009
- Speaker, CLE Seminar, Bridging the Gap, topic: "Probate," October 2009
- Mentor, NYCLA, Ethics Institute, 2009-2010
- Speaker, CLE, Not for Profit Boards, October 2009
- Event Committee, Fall Nina McLemore Fashions, November 2009
- Mentor, NYCLA Pilot Mentoring Program, 2010 and 2011
- Speaker, CLE, Bridging the Gap, "New NYS Power of Attorney Form"- Jan. and Aug., 2010

- Speaker, CLE, ''Planning for Non-Traditional Couples''-Jan. 25, 2010
- Member, NYCLA Membership Task Force
- Speaker, CLE, ''Estate Planning for Real Estate Owners,'' October 2010
- Speaker, CLE, ''Bridging the Gap,'' The New NYS Power of Attorney Form, April 2011
- Speaker, CLE, ''What's Next in Estate Planning,'' with Trusts & Estates Magazine, May 2011
- Member, NYCLA Special Committee/Task Force Re: Membership
- Speaker, NYCLA. Bridging the Gap, ''New NYS Power of Attorney Form,'' July 2011
- Promotions, NYCLA Bar Foundation, Fall Founders Cocktail Party
- Member, NYCLA Task Force on Judiciary Budget Cuts 2011 & creator of Task Force Questionnaire, Chair of Guardianship Subcommittee and member of Surrogate's Committee
- Panelist/Speaker, NYCLA Task Force Public Forum on Judiciary Budget Cuts December 2, 2011
- Speaker, NYCLA CLE, ''New NYS Power of Attorney Form,'' December 2011
- Speaker, NYCLA CLE-Introduction to Guardianship Law, May 2012
- Speaker, NYCLA CLE-Introduction to Guardianship Law, July 2012
- Speaker, NYCLA CLE-Introduction to Guardianship Law, March 2012
- Speaker, NYCLA CLE-Guardianship and Landlord Tenant Law September 20, 2013
- NYCLA appointment to New York Supreme Court Guardianship Advisory Board
- Speaker, NYCLA CLE-Introduction to Guardianship Law, December 2013
- Member, Mentoring Committee

NYCLA AWARDS

- Jack Newton Lerner Award for Excellence in the Contribution of CLE Training, September 2013

New York State Bar Association

- *Chair, former Vice-Chair of CLE Section, Executive Board Member,* Section on Trusts and Estate; Committee on Elderly and Disabled; Committee on Estate Litigation; Pre-Mortem Will Contest Subcommittee
- *Contributing Author*, New York State Bar Association Litigation Committee's volume on New York Will Contests, *Co-Author,* chapter on "Undue Influence" (anticipated publication 2013)
- *Member,* Section on Elder Law
- *Member,* Commercial and Federal Litigation Section
- *Member, Select Appointment to Committee on Cyberspace Law,* 2003-2004
- *Speaker,* Contested Accountings, New York, December 2009
- *Speaker*, ''SCPA Discovery §2103, §2104 and §2105," June 2011
- *Speaker*, CLE, ''Powers of Attorney Practice and Litigation Under the New Law, Remedies,'' June. 2012
- *Statewide Co-Chair*. CLE, ''Practical Skills: Probate and the Administration of Estates,'' Fall 2012
- *Statewide Co-Chair*, CLE, ''Contested Accounting Proceedings in Surrogate's Court: The Law and
- Techniques You Should Know- Spring 2013
- *Statewide-Co-Chair,* CLE, ''Discovery Proceedings in Surrogate's Court: How to Fight Them and How to Avoid Them''-June 2014
- *Statewide Chair*, CLE, ''Introduction to Estate Planning''-November 2015

New York City Bar Association

- *Member,* Council on Judicial Administration, 2008-present;
- *Chair,* Subcommittee on Guardianship Law 2008-present
- *Member,* Committee on State Courts of Superior Jurisdiction, 2005-07
- *Speaker,* CLE, Detecting Forgery, Spring 2009
- *Speaker,* CLE, Power of Attorney, Summer 2009
- *Chair,* First Department Judicial Guardianship Roundtable, November 2009
- *Chair,* Subcommittee on Judicial Nominations, *Member,* Committee on Judicial Conduct
- *Speaker,* Law Week Public Forum: Planning for Late in Life, May 2011
- *Speaker,* Matrimonial Committee- Guardianship Law and Powers of Attorney

Network of Bar Leaders

Board member, Representative for Columbian Lawyers Assn. 2010-2011

Columbian Lawyers Association, First Judicial District

- *Publicity Chair*, 2010 to present
- *Speaker,* CLE, "New York's New Power of Attorney," Spring 2010

Jewish Lawyers Guild, member in good standing

American Bar Association, 2002-2006

NATIONAL ACADEMY OF CONTINUING LEGAL EDUCATION

National Speaker, "Power of Attorney," Spring 2012

PRO BONO ACTIVITIES

- Pro Bono Employer/Mentor of paralegal students with CUNY's Associate Degree Program at New York City College of Technology, Legal Assistant Studies Department 2006-2010
- Counseling in matrimonial matters

COMMUNITY BOARD 5 2011-2013

- General Board Member of Community Board 5 in New York City
- Committee Member of Consents and Variances Committee 2011-13
- Committee Member of Education, Health and Human Services Committee 2011-13
- Committee Member of Housing, Human Services & Youth 2011-13
- Committee on Vendor Investigations
- Opposition-Jamestown Plan for Chelsea Market
- DOITT's Request for information /Sidewalk Based Telecommunication Devices

COMMUNITY SERVICE SOCIETY, NYC

Formed in 1939 by the merger of two venerable social service agencies: The New York Association for the Improvement of the Condition of the Poor (founded in 1843) and the Charity Organization Society (founded in 1882). Organization that fights poverty, access to healthcare, Affordable Housing, Disconnected Youth, Economic Security, Imprisonment and Re-entry and Workforce Poverty.

- Trustee, Member of the Board of Trustees-2011 to Present
- Member of Communications Committee
- Member of Committee on Development

UNITED NATIONS

Speaker, Sixth Session of the Conference of State Parties to the Convention on the Rights of Persons with Disabilities, 18th July 2013

Speaker, United Nations, "First Convocation of First Ladies of Africa, Latin America and Caribbean Nations," Women in Politics, September 24, 2013

COMMUNITY & POLITICAL ACTIVITIES-*Democratic State Committee Person 75th A.D.*

- *Member*, Independent Judicial Screening Panel, Civil Court, City of New York, 2004
- *Member,* Host Committee, "Show Up for Cocktails" Event at which Leecia Eve, former counsel to Senator Hillary Clinton, announced formation of "SHOW UP New York" to mobilize young voters, June 2006

- *Judicial Panel Administrator*, Democratic Party, First Judicial District for the Selection of Civil Court Judges, 2008
- *Member*, Independent Judicial Screening Panel, Civil Court, City of New York, 2010
- *Democratic County Committee Person*, Political District 83/66 2012-2013
- *Delegate: Democratic Judicial Convention,* September 24, 2012 to present
- *Executive Committee Member*, Chelsea Reform Democratic Club, September 2012 to present
- *New York State Democratic Committee,,* State Committee Person, 75th A.D. 2012 to present
- *Chair, Executive Committee, Nomination's Committee*, Chelsea Reform Democratic Club 1/2013
- *Chair, Executive Committee, Nomination's Committee*, Chelsea Reform Democratic Club 12/2013
- *Chair, Executive Committee, Nomination's Committee,* Chelsea Reform Democratic Club 2014
- *Female District Leader, 75th AD Part A 2014 to present*

PROFESSIONAL ACTIVITIES

- *Member,* National Organization of Italian American Women
- *Member,* Brooklyn Law School, Alumni Association; Judge, Prince Moot Court Competition, 2001-present
- *Member,* Italian American Law Students Association
- *Member,* Health Business Alliance 2010

MEDIA AND PUBLICATIONS

- *Author*, Verdict, "Crisis in Guardianships," National Coalition of Concerned Legal Professionals, Jan. 2010
- *Author*, Verdict, "Impact of the New Power of Attorney Form in New York," Jan. 2010
- *Author,* Live Your Life by the Numbers (Penguin Books, 1991)
- *Contributing Writer,* Nuvo News-Minneapolis, MN
- *Author*. NYSBA Chapter on "Undue Influence," presently pending publication

MEDIA APPEARANCES and SPEAKING ENGAGEMENTS

- 100+ national radio and television appearances and celebrity & political profiles, including on *The Montel Williams Show, Phil Donohue Show, Maury Povich, The Joan Rivers Show, Geraldo, CBS This Evening, NBC This Evening*, MSNBC, NYBC, Lifetime Television, BBC, Cablevision, WABC, WCBS. WMWK, WMCA, WOR, WLIB, KBX, WOOD
- *Featured*, New York Magazine, April 2008, "New York's Women's Leaders in the Law."
- *Featured speaker on national radio programs:* retirement and estate planning, relationship conflicts over money, prenuptial agreements, the Boston Catholic Church, cyber adultery, father's rights, custody issues
- *Featured Speaker:* "Backwards in Heels," Women's Networking Forum, First American Title Company, The Adventure Group, September 2008
- *Featured Speaker:* "Bath Junkie," Dr. Robert Sorin: Health, Comfort & Beauty, 1/15/09.
- *Featured Speaker:* "Just Us Girls," Women's Networking Group, 1/16/09.
- *Keynote Speaker*, National Coalition of Concerned Legal Professionals, May 2011 Reception-The Elder Law Crisis
- *Speaker,* National Coalition of Concerned Legal Professionals, ''Plan for Aging,'' October 5, 2012
- *Internet Speaker,* Consumermojo.com, Barbara Nevins Taylor, The Power of Attorney, 2013
- *Speaker*, United Nations, New York, ''The Interface Between Aging and Disability,'' July 18. 2013.
- *Speaker,* United States Court of International Trade, Preparing for Aging, September 30, 2015

PATRICIA J. SHEVY, ESQ.
THE SHEVY LAW FIRM, LLC

We are dedicated to providing our clients with not only the most appropriate estate or business plan, but one that is clear, easy to understand and will meet the client's needs today and for years to come.

Patricia J. Shevy is the founder of The Shevy Law Firm, LLC, of Albany, New York. Tricia focuses her practice exclusively in the areas of estate planning and administration, elder law and business succession planning.

Tricia believes in the teamwork approach and regularly works with her clients and their investment advisors, bankers, insurance agents and accountants to ensure that the plan meets the client's long term objectives.

Tricia is an active member of the New York State Bar Association- Trusts and Estates Section (former Chairperson and active member of the Life Insurance and Employee Benefits Committee) and Elder Law Section (Co-Chair of the Estates and Tax Committee and member of the Board of Editors of the Elder and Special Needs Law Journal). She is also a member of the Albany County Bar Association, National Academy of Elder Law Attorneys and Schoharie County Chamber of Commerce.

Tricia's past public service includes serving on the Boards of Directors of Childs Nursing Home, Albany County Correctional Facility for Children's Benefit, Rensselaer County Housing Resources Corporation and the Watervliet City School District Board of Education, serving as president for 3 years. Currently, Tricia is on the Board of Directors and Treasurer of The Bus Stop Club, Inc., a support program for the siblings of chronically ill children.

Tricia earned a Bachelor of Science in Management-Finance from Rensselaer Polytechnic Institute in 3 years. Following graduation from RPI in 1994, Tricia received her Juris Doctor, *cum laude*, from Albany Law School of Union University in 1997, where she was a member of the Justinian Society.

Tricia routinely lectures to small groups regarding estate tax planning, long term care planning, estate planning issues for parents of disabled children as well as the unique issues of estate planning for non-traditional families and small business owners. Tricia also regularly lectures and writes for continuing legal education programs offered by the New York State Bar Association.

7 EXECUTIVE CENTRE DRIVE
ALBANY, NEW YORK 12203
PHONE: 518-456-6705
FACSIMILE: 518-456-6709
WWW.SHEVYLAW.COM

FACULTY BIOGRAPHIES

Melville, L.I.

Susan Mary Bacigalupo, Esq.

McCoyd, Parkas & Ronan LLP, Garden City, NY

Partner

Areas of Practice

Estate Planning

Wills

Trusts

Real Estate

Estate and Trust Litigation

Estate and Trust Adminstration

Bar Admissions

New York, 1980

U.S. District Court Eastern District of New York, 1981

U.S. District Court Southern District of New York, 1981

Education

Hofstra University School of Law, Hempstead, New York

- J.D. - 1980
- Honors: With Distinction
- Law Review: Hofstra Law Review, Associate Editor, 1978 - 1980

Hofstra University

- B.A. *magna cum laude* - 1977

Past Employment Positions

Edward A. McCoyd, P.C., 1983 - 2000

McCoyd & Keegan, 1980 - 1983

Jill Choate Beier, Esq.

Jill Choate Beier is an Assistant Professor at Marymount Manhattan College teaching courses in accounting, business law and income taxation. Her research interests focus on the areas of trusts and estates law as well as income, estate and gift taxation. In addition to her teaching responsibilities, Professor Beier acts as the Faculty Advisor and Coach to the MMC Mock Trial Team. The team participates in a regional tournament sponsored by the American Mock Trial Association each year.

Professor Beier involves her students in community service work by coordinating MMC's participation in the Volunteer Income Tax Assistance program which is a nation-wide program administered by the IRS. Professor Beier teaches the student volunteers basic income tax preparation prior to their placement in a VITA site.

Ms. Beier is also a Partner of the McGlashan Law Firm located in New York City where her practice includes a broad range of matters in the personal planning area, including estate and tax planning for individuals and families; estate and trust administration; all aspects of Surrogate's Court practice, including probate proceedings, will contests and guardianships, and planning for charitable giving and philanthropy.

Prior to becoming a partner at MLF, Ms. Beier practiced law at Sullivan & Cromwell LLP and Patterson Belknap Webb & Tyler LLP and has held management positions at large financial institutions such as JP Morgan and Credit Suisse.

Ms. Beier is very active in the New York State Bar Association having held several positions of leadership on various committees of the Trusts and Estates Law Section. Ms. Beier is currently the Chair of the Estate and Trust Administration Committee.

Ms. Beier earned a BBA in Finance from the University of North Texas, an MBA from Fordham University Graduate School of Business (concentration in Professional Accounting), a J.D. from Touro Law School and a LL.M. in Taxation from New York University School of Law.

September 2015

KEITH D. BLACK, ESQ.

KEITH D. BLACK, P.C.
5173 MERRICK ROAD
MASSAPEQUA PARK, NEW YORK 11762
516.522.2873

WWW.KEITHBLACKLAW.COM

Mr. Black maintains a primary office in Massapequa Park, New York.

Mr. Black serves as special counsel to The Diamond Law Group. Mr. Black also provides counsel to the law firm of Greco & Wolfe, PLLC, located in Garden City, New York, and the LaSasso Law Group PLLC, located in Manhattan.

Mr. Black's law practice is focused on the areas of Trusts and Estates, which includes estate and trust administration, estate and gift tax planning, business succession planning, asset protection, estate and trust litigation, guardianship's, planning for individuals with special needs and real estate transaction. Mr. Black receives appointments by the Surrogate's Courts as a Guardian ad Litem to represent minors and other persons under a disability in Surrogate's Court proceedings. Mr. Black also receives appointments as a Guardian and Court Evaluator in Supreme Court matters brought under Article 81 of the New York Mental Hygiene Law.

Previously, Mr. Black was an associate attorney at Karol Hausman & Sosnik, P.C. and Brosnan & Hegler, LLP, both located in Garden City, New York. During his tenure at Brosnan & Hegler, LLP, Mr. Black directly assisted Mark J. Brosnan, Esq. as counsel to the office of the Nassau County Public Administrator. Mr. Black's legal experience began in 2000 when he worked in the litigation department of Clifford Chance Rogers and Wells, LLP, in New York City. Mr. Black also worked in the corporate real estate department of Skadden, Arps, Slate, Meagher & Flom, LLP, in New York City. Mr. Black's career in Trusts & Estates began in 2006 when he served as the law intern to the Honorable John B. Riordan, Surrogate of the Nassau County Surrogate's Court.

Mr. Black is an active member of the Nassau County Bar Association (Member: Surrogate's Court Estates & Trusts Committee, Tax Law Committee, Elder Law Committee, and Young Lawyers Committee). Mr. Black is a member of the New York State Bar Association (Member: Trusts and Estates Law Section and Elder Law Section). Mr. Black is also a member of the Touro College - Jacob D. Fuchsberg Law Center Alumni Council, and the Nassau Lawyers Association, to which he is the current Vice-President, and past Treasurer.

Mr. Black also sits on the Board of Trustees of Congregation Beth-Ohr (formerly, Bellmore Jewish Center, having completed merger and consolidation with Congregation Beth-El of Massapequa).

Mr. Black is admitted to practice before the courts of the State of New York.; Bar Admission: 2007; Touro College – Jacob D. Fuchsberg Law Center (J.D., 2006); State University of New York at Binghamton with dual concentration in finance and management information systems (B.S., 2001).

RMF
RUSKINMOSCOUFALTISCHEK P.C.
Counselors at Law

"

John G.
Farinacci

"

John G. Farinacci
Partner

Widener University School of Law (J.D. 1997) St. Johns University (B.A. 1994)

Phone: (516) 663-6628
Fax: (516) 663-6828
Email: jfarinacci@rmfpc.com
Add to Outlook Contacts

Mr. Farinacci is a partner and co-chair of the firm's Trusts and Estates Department.

Mr. Farinacci represents clients in all aspects of trust and estate law, including estate planning, probate, estate and trust administration, Surrogate's Court practice and guardianships. Mr. Farinacci's practice is most heavily concentrated in estate litigation, trust litigation and related disputes.

Mr. Farinacci has successfully handled numerous contested cases including both the prosecution and defense of contested probates/will contests, will and trust construction proceedings, contested fiduciary accounting proceedings, imprudent fiduciary investment cases, contested guardianship proceedings, kinship proceedings, discovery and turnover proceedings, constructive trust proceedings, and a broad variety of other disputes that relate to the affairs of a decedent or administration of an estate or trust.

Mr. Farinacci handles appeals as well as cases at the trial court level. He has argued numerous appeals in

PRACTICE AREAS

- Estate Litigation
- Trusts and Estates

PUBLICATIONS

PDF Estate Tax Apportionment and Ratable Contribution to Elective Share (*Trusts and Estates*);

PDF The Right of Election and Tax Apportionment (*Trusts and Estates*);

PDF 'Knox,' the Prudent Investor and Fiduciary Duties - New York Law Journal, 9-18-2012 (*Trusts and Estates*);

PDF From Greiff to Campbell and Berk (*Trusts and Estates*);

PDF The Judicial Evolution of Spousal Protection Under Estates Law (*Trusts and Estates*);

the New York State Supreme Court, Appellate Division and successfully argued an appeal in New York's highest Court, the New York State Court of Appeals.

Mr. Farinacci's clients have included individual beneficiaries, heirs, executors, trustees and corporate fiduciaries.

Mr. Farinacci frequently lectures in continuing legal education programs of Law on various trusts and estates topics.

Mr. Farinacci got his start in Surrogate's Court practice as an intern with the Nassau County Surrogate's Court (Hon. C. Raymond Radigan) in 1996.

Mr. Farinacci serves on the Board of Trustees of the Long Island Children's Museum

Professional Associations

- New York State Bar Association Trusts and Estates Section Member since 1998
  Current member of the Executive Committee
  Current Chair of the Estate Litigation Committee
  Past Vice-Chair of the Continuing Legal Education Committee
  Past Chair of the Surrogate's Court Committee
- Nassau County Bar Association Surrogate's Court Estates and Trusts Committee
  Member since 1998
  Past Chair
- Columbian Lawyers Association of Nassau County
  Member since 2013
- Trustee of the Long Island Children's Museum

Honors and Awards

- Super Lawyers: 2015 selectee for New York Metro
- Long Island Business News' 40 under 40 Award. 2007 honoree.
- New York State Bar Association: Twelve time recipient of Certificates of Appreciation for the contribution of time, effort and ability in

improving the professional competence of the bar.

- Nassau Academy of Law: Presented with Certificates of Merit for service and expertise for the advancement of legal jurisprudence

Blogs

- A Matter of Convenience: From Bank Accounts to Real Property (Lexis Nexis Estate Practice and Elder Law Blog, 6/11/15)
- Rules Concerning Non-Party Subpoenas Finally Made Uniform (Lexis Nexis Estate Practice and Elder Law Blog, 4/29/14)
- Abandonment Cases in Surrogate's Court Present Difficult Factual Issues (Lexis Nexis Estate Practice and Elder Law Blog, 2/18/14)
- Estate Failed to Prove Museum's Laches on Claim to a 3,000 Year Old Archeological Artifact Missing Since WWII (Lexis Nexis Estate Practice and Elder Law Blog, 1/06/14)
- Spouse vs. Charity: Estate Tax Apportionment (Lexis Nexis Estate Practice and Elder Law Blog, 5/14/13)
- Hostility as a Basis to Deny Fiduciary Appointment (Lexis Nexis Estate Practice and Elder Law Blog, 3/01/13)
- Life Imitating Art on the Stage of the Surrogate's Court (Lexis Nexis Estate Practice and Elder Law Blog, 8/08/12)
- Summary Judgement in Will Contests: An Epilogue (Lexis Nexis Estate Practice and Elder Law Blog, 3/20/12)
- Summary Judgment in Will Contests: Matter of Lubin (Lexis Nexis Estate Practice and Elder Law Blog, 2/13/12)

FARRELLFRITZ PC
BECAUSE SUCCESS MATTERS.

Joseph T. La Ferlita

Trusts & Estates

Partner | 516-227-0714 | jlaferlita@farrellfritz.com

LOCATION: Uniondale

Joseph T. La Ferlita is partner to the firm concentrating his practice in trusts and estates law, with an emphasis on estate planning, estate and trust administration, and tax controversy. He counsels individual planning clients, beneficiaries, individual and corporate fiduciaries, and not-for-profit entities, including public charities and private foundations, in connection with a multitude of estate and trust-related matters. These include, among others, the drafting of wills and trusts, estate tax and generation skipping tax planning, audits of estate tax returns and income tax returns, the formation of not-for-profit entities, obtaining Private Letter Rulings from the Internal Revenue Service, probate proceedings, administration proceedings, judicial accounting proceedings, judicial proceedings for advice and direction on behalf of executors and trustees, spousal elective share proceedings, and proceedings for the construction and reformation of wills and trusts. He represents clients in the Surrogates Court and the United States Tax Court.

Mr. La Ferlita is admitted to practice in the State of New York, the Commonwealth of Massachusetts and the United States Tax Court. He is a member of the American and New York State Bar Associations.

Mr. La Ferlita is especially active in the Trusts and Estates Law Section of the New York State Bar Association, where he serves as District Representative for Nassau and Suffolk Counties, Chairman of the Surrogates Court Committee and Member of the Estate and Trust Administration Committee. He plays a key role in drafting proposals for new and amended estate-related New York statutes, some of which ultimately have been signed into law by the Governor of New York State.

In 2002, Mr. La Ferlita was a Judicial Intern to the Honorable Thomas C. Platt of the United States District Court, EDNY.

Mr. La Ferlita has had two LexisNexis Expert Commentaries published on Lexis.com. The first is entitled, "Whether the Distinction Between Construction and Reformation Proceeding in New York Surrogate Courts Still Exists." The second is entitled, " The Fundamentals of the Separate Share Rule."

In May 2011, Mr. La Ferlita received an LL.M. degree in taxation from New York University School of Law. He received his Juris Doctor degree, Dean's List, from St. John's University School of Law in 2004, where he served as a member of the ***American Bankruptcy Institute Law Review***. Mr. La Ferlita earned his M.A. degree in Theology from Boston College in 1998 and his B.S. degree in Biology from Fairfield University in 1996.

Prior to attending law school, Mr. La Ferlita was a high school teacher for several years in the Boston area.

Office
Uniondale
1320 RXR Plaza
Uniondale, NY 11556-1320

Practice Areas
Trusts & Estates
Tax

Education
Boston College (MA)
Fairfield University (BS)
New York University School of Law (LL.M.)
St. John's University School of Law (JD)

FARRELLFRITZ P.C.
BECAUSE SUCCESS MATTERS.

Jordan S. Linn

Trusts & Estates

Counsel | 516-227-0793 | jlinn@farrellfritz.com

LOCATION: Uniondale

Jordan S. Linn is counsel in the trusts and estates department focusing in estate planning and administration. He is a contributor to Farrell Fritz's New York Trusts & Estates Litigation blog. Mr. Linn is a frequent lecturer on trusts and estates topics, presenting at continuing education programs for both attorneys and accountants.

Mr. Linn's practice focuses upon structuring and implementing sophisticated gift, estate and generation skipping tax planning techniques, and the drafting of trust agreements, wills and advance directives. His practice also includes the representation of fiduciaries in the probate and administration of estates and trusts.

Mr. Linn has assisted in the representation of clients involved in Internal Revenue Service audits and United States Tax Court proceedings relating to gift, estate and excise taxes; as well as the formation and representation of private foundations and public charities.

Mr. Linn was selected for the *Super Lawyers New York Metro Rising Stars* (Estate & Probate) list in 2013-2015. Mr. Linn was recognized as one of *Long Island Business News'* "40 under 40" in 2014. He was also the recipient of the 2013 *Long Island Business News* "Leadership in Law" *Counsel* Award. *Long Island Pulse Magazine* recognized Mr. Linn as one of "2013 Top Legal Eagles". In October 2011, Mr. Linn was recognized in *Long Island Business News'* "Ones to Watch in Retirement and Estate Planning."

Representative matters include: - Drafting and implementation of Grantor Retained Annuity Trusts (GRAT), Qualified Personal Residence trusts (QPRT), Intentionally Defective Grantor Trust transactions (IDGT), Irrevocable Life Insurance Trusts, Charitable Lead and Remainder Trusts (CLAT/CRAT), Revocable Trusts, and Dynasty and Generation Skipping Tax (GST) trust planning. - Probate and administration of large estates which include numerous testamentary and inter-vivos trusts and involve the preparation of state and federal estate tax returns.

Mr. Linn serves as a member of the Holocaust Memorial and Tolerance Center of Nassau County's board of directors. In 2011, he was appointed to the New York State Bar Association's Electronic Communications Committee.

Mr. Linn earned his LL.M. degree in Taxation from the University of Alabama School of Law in 2013; his Juris Doctor degree in from Hofstra University School of Law in 1999 and his Bachelor of Arts in Political Science from Binghamton University, State University of New York in 1996.

Mr. Linn is admitted to practice before the United States Tax Court and New York State Courts. He is a member of the New York State Bar Association, and has served as an Adjunct Professor of Continuing Education at CUNY Queens College.

Mr. Linn is a New York State Office of Court Administration Certified Court Evaluator and Certified Counsel to Guardian.

Mr. Linn has an AV Preeminent Martindale-Hubbell Peer Review Rating.

Office
Uniondale
1320 RXR Plaza
Uniondale, NY 11556-1320

Practice Areas
Trusts & Estates
Tax

Education
Hofstra University School of Law
State University of New York at Binghamton
University of Alabama School of Law LL.M.

FARRELLFRITZ P.C.
BECAUSE SUCCESS MATTERS.

Eric W. Penzer

Estate Litigation

Partner | 516-227-0618 | epenzer@farrellfritz.com

LOCATION: Uniondale

Eric Penzer is a partner concentrating in trust and estate litigation. His practice includes contested probate proceedings, fiduciary accounting proceedings, discovery proceedings, and other litigation related to estates and trusts. He is a frequent contributor to Farrell Fritz's New York Trusts & Estates Litigation blog.

Mr. Penzer is a frequent author of articles on trust and estate litigation practice and lectures extensively on the subject. He is a member of the Executive Committee of the Trusts and Estates Law Section of the New York State Bar Association, a Chairperson of its Practice and Ethics Committee, and a former Chairperson of its Litigation Committee. Mr. Penzer is a member of the New York City Bar Association's Trusts, Estates, and Surrogate's Court Committee, and the Nassau County Bar Association's Surrogate's Court Estates & Trusts Committee.

Mr. Penzer has an AV Preeminent Martindale-Hubbell Peer Review Rating. In 2016, he was selected to The Best Lawyers in America. Mr. Penzer was selected for inclusion on the 2014 and 2015 *Super Lawyers New York - Metro Edition* list (Estate & Trust Litigation), having previously been included on the 2011 Super Lawyers Rising Stars list. In 2009, he was the recipient of *Long Island Business News*' "40 Under 40" award, honoring professionals for their business leadership and community involvement.

He is a Vice President and member of the Board of Directors of The Safe Center LI, located in Bethpage, a non-profit agency serving the victims of domestic abuse and child abuse. He is also a member of the Board of Directors of the Long Island Elite, an organization dedicated to promoting the growth and development of Long Island's business executives by combining community outreach, fundraising for Long Island charities, mentoring, and professional networking. In 2015, Mr. Penzer received the Nassau County Bar Association's Access to Justice Award for his pro bono work.

Mr. Penzer is a former intern to the Honorable Arthur D. Spatt, United States District Judge for the Eastern District of New York. He received his Juris Doctor in 1996 from Fordham University School of Law, where he was an Associate Editor of the Fordham Intellectual Property, Media & Entertainment Law Journal. In 1993, he received his Bachelor of Arts Degree from the State University of New York at Stony Brook.

Mr. Penzer is admitted to practice in the State of New York, in the United States District Courts for the Eastern and Southern Districts of New York, and in the United States Court of Appeals for the Second Circuit.

Office

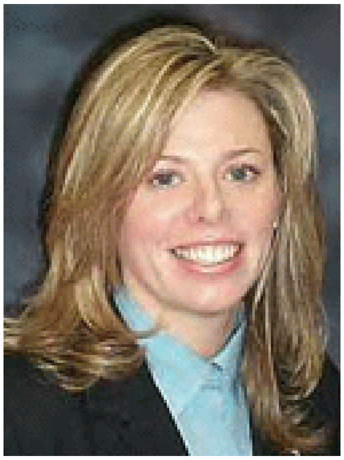
Uniondale
1320 RXR Plaza
Uniondale, NY 11556-1320

Practice Areas

Estate Litigation
Trusts & Estates

Education

Fordham University School of Law
State University of New York at Stony Brook



Wendy H. Sheinberg is a partner with the law firm of Davidow, Davidow, Siegel and Stern, LLP and concentrates in the areas of Guardianship, Elder Law, Special Needs Planning, Trust and Estate Planning and Trust and Estate Administration. She has presented at numerous seminars on Elder Law and Estate Planning, Senior Housing and on Probate and Estate Administration and has lectured for the New York State Bar Association, the Nassau County Bar Association and many other notable local civic and religious groups.

Ms. Sheinberg has published articles in the New York State Bar Association Law Journal, the University of South Dakota Law Review, the NAELA Quarterly, Senior News and the Journal of the Nassau County Bar Association. Ms. Sheinberg has been interviewed and quoted in such notable publications and news services as U.S. News and World Reports, the New York Times, Newsday and Dow Jones Newswire.

Background
Ms. Sheinberg has been certified by the National Elder Law Foundation as a Certified Elder Law Attorney (CELA) and has completed the Guardianship Training at the Samuel Sadin Institute on Law of the Brookdale Center on Aging at Hunter College.

She was selected as a Fellow of the National Academy of Elder Law Attorneys (NAELA). Selection as a Fellow is the highest honor bestowed by the Academy. Election as a Fellow signifies that his/her peers recognize the lawyer as a model for others, and as an exceptional lawyer and leader. Selection as a Fellow acknowledges the highest degree of commitment to serving older persons and people with special needs.

Martindale-Hubbell recognizes Wendy H. Sheinberg as an AV® rated attorney. An AV® certification mark is a significant rating accomplishment – a testament to the fact that a lawyer's peers rank him or her at the highest level of professional excellence.

Ms. Sheinberg has repeatedly been named one of the top elder law attorneys in the New York Metro area by Super Lawyers and one of the top women attorneys in the New York Metro area by Super Lawyers.

Associations
Ms. Sheinberg is a member of the Special Needs Alliance and is a past member of the Board of Directors of the National Academy of Elder Law Attorneys and is a Vice President of the Long Beach Lawyers' Association. She is a member the National Academy of Elder Law Attorneys (NAELA) the New York State Bar Association: Elder Law Section and a member of the Irish American Bar Association of New York. Ms. Sheinberg is admitted to the Bar in New York State and Connecticut and is admitted to practice in the United States District Courts of the Eastern and Southern Districts.

Like Wendy on Facebook at https://www.facebook.com/sheinberglaw and follow her on Twitter @wendysheinberg; learn more at www.Sheinberglaw.com

MICHAEL J. SULLIVAN
msullivan@novicklawgroup.com

Michael J. Sullivan is an attorney at Novick & Associates.

Background
Michael was born in Brooklyn, New York. He is a graduate of Colgate University where he earned his Bachelor of Arts in Political Science. While attending New York Law School, he served as Managing Editor of the Law Review. Michael earned his Juris Doctorate with honors in 1989. He received his Masters of Law in Taxation from New York University School of Law in 1998. Michael is admitted to the bars of the States of New York, Connecticut, New Jersey and the United States District Court for the Eastern and Southern Districts of New York, and United States Tax Court.

Michael joined Donald Novick in 2003. Since working with Mr. Novick, he has developed his practice in estate planning, probate and estate litigation, and contested accountings. By preparing and analyzing estate matters at the outset, Mr. Sullivan has been able to settle many estate matters expeditiously and has maximized our client's financial recoveries.

Practice Areas
Michael concentrates his legal practice in the areas of Estate Planning, Estate Litigation, Probate, Taxation, Commercial Law, Trusts and Estate Administration.

Memberships
Mr. Sullivan is an active member of the New York State and Richmond County Bar Associations. He is also a member of the New York State Bar Associations Committees on Practice and Ethics and Newsletters and Publications.

FACULTY BIOGRAPHIES

Albany

JENNIFER L. ALLINSON
Partner
LaVelle & Finn, LLP, Latham

JENNIFER L. ALLINSON concentrates her practice on estate planning, estate administration and business succession planning. She also works and consults with property owners and their advisories on protecting land through the use of conservation easements and other tax advantaged strategies.

Ms. Allinson earned a Bachelor of Arts in Political Science and Philosophy from the University of Pittsburgh. She holds a Juris Doctor from Albany Law School and is admitted to practice in New York.

Before joining Lavelle & Finn, LLP, Ms. Allinson was a financial analyst for a large financial services company in Albany, New York.

Ms. Allinson is a member of the board of directors of the Estate Planning Council of Eastern New York, Inc., and a member of the New York State Bar Association - Trust & Estates Section.

JENNIFER M. BOLL

Partner

jboll@hodgsonruss.com 518.433.2416

677 Broadway
Suite 301
Albany, NY 12207

Jennifer focuses her practice on corporate, tax, and estate and business succession planning matters. She advises privately held companies and individuals with respect to a wide range of corporate and tax matters, including mergers and acquisitions, real estate, financial transactions, and complex trust and estate matters.

In addition to her legal practice, Jennifer is a lecturer for the M.S. in taxation program at the University at Albany, State University of New York, where she teaches courses on federal, state, and interstate taxation. She is also an adjunct professor at Albany Law School, where she teaches courses on corporate tax, state and local tax, and estate planning.

Honors

- Multiple Sclerosis Society of Northeastern New York Leadership Award
- *Albany Business Review*'s 2014 40 Under Forty Award

Experience

Jennifer has extensive experience handling a broad array of corporate and tax matters for her clients. Representative examples of Jennifer's work include:

- Recapitalizing a client's business entity and preparing all associated estate planning documents needed to allow for the orderly transfer of the client's businesses to the next generation
- Leading a team to assist a publicly held client in issuing a new class of preferred stock through a private placement
- Planning and implementing a stock repurchase program for a client with widely held securities
- Handling legal and tax aspects of several trusts formed to maintain significant rental real estate holdings, charitable interests, and other business holdings

Areas of Practice

Business Tax

Corporate & Business Law

Estates & Trusts

Family Business & Succession Planning

Mergers & Acquisitions

Startups & Emerging Companies

State & Local Tax

Tax Dispute Resolution

Admissions

New York

Connecticut

Massachusetts

U.S. Tax Court

U.S. District Court for the Northern District of New York

Education

B.A., summa cum laude, Siena College

J.D., cum laude, Harvard Law School

- Successfully concluding a significant IRS audit and appeals hearing involving deductibility of passive losses
- Obtaining voluntary disclosure agreements/penalty abatements for clients with significant unreported New York State income and sales and use tax
- Settling a New York State tax controversy involving employee classification and out-of-state contractors
- Advising several clients in the construction industry and design professions regarding corporate and operational planning needed to qualify for New York State WBE and DBE certifications
- Acted as a testifying expert witness with respect to income tax issues in a litigated corporate dissolution matter

News

Hodgson Russ Snags 2 Tax Pros for Upstate NY Offices
Law360, September 11, 2013

Jennifer M. Boll and Thomas J. Collura Join Hodgson Russ as Partners
September 9, 2013

Presentations

Albany Times Union Capital Region Women@Work Panel: Keys to Financial Success
Albany, NY, October 20, 2015

New York Council of Nonprofits Seminar: Living with the NY Nonprofit Revitalization Act - Practical Advice
Albany, NY, October 8, 2015

Affordable Care Act: 2015 Update for NYS Society of CPAs
August 24, 2015

2015 Tax Roadshow
July 15, 2015

Affordable Care Act: 2015 Update for Tax Professionals
Tuesday, June 2, 2015 & Wednesday, June 3, 2015

Managing Cyber Risk: A Primer for All Businesses
The Century House, 997 New Loudon Road, Latham, NY 12110, May 5, 2015

Schenectady County Bar Association Trusts and Estates CLE: Estate and Income Tax Update - The Year in Review
Scotia, NY, March 12, 2015

Association of Career and Technical Education Administrators Seminar: New York's Nonprofit Revitalization Act
Albany, NY, February 27, 2015

New York State Bar Association Seminar: The Non-Tax Lawyer's Guide to Tax Law
December 9, 2014

New York State Council of Educational Associations Seminar: NY Nonprofits - What You Need to Know About the NY Nonprofit Revitalization Act
October 24, 2014

Publications

Changes on the Horizon for the SBA 8(m) Women-Owned Small Business Program
Corporate & Business Law Alert, July 10, 2015

What to Expect in a New York Residency Audit
Hodgson Russ Publication, October 2014

New York's Estate Tax System Undergoes Major Overhaul
JD Supra, April 4, 2014

Major Changes Expected to New York State's Estate Tax System
JD Supra, January 28, 2014

Innocent Spouse Relief for Income Taxes: If at First You Don't Succeed
Capital District Women's Bar Association Newsletter, 2013

Marriage for Tax Sake
Capital District Women's Bar Association Newsletter, 2013

Once a Domicile in New York, Always a Domicile in New York - What Does it Mean?
Capital District Women's Bar Association Newsletter, January 1, 2012

Out of State Sales Tax Collection Obligations: Is Physical Presence Still the Standard?
CPA Journal, August 2008

Sarbanes-Oxley Creates Executive Stock Option Limits
Capital District Business Review, February 3, 2003

Sarbanes-Oxley Subjects CPA Firms to New Level of Oversight
Capital District Business Review, January 13, 2003

Professional Affiliations

- Harvard Law School Alumni Association
- Co-founder, Women Partners' Forum of the Capital Region
- American Bar Association Business Law and Taxation Sections

- New York State Bar Association Trusts & Estates, Business Law, and Real Estate Sections
- Past delegate, Women's Bar Association of the State of New York
- Chair, Capital District Women's Bar Association Legislative Committee
- Albany County Bar Association
- Columbia County Bar Association

Community & Pro Bono

- Siena College board of associate trustees
- Junior Achievement of Northeastern New York, Inc. board of directors
- Annual speaker, University of Albany Young Entrepreneur Program
- Lung Cancer Alliance advisory board
- Former co-chair, Community Cradle board of directors
- Former member, Governor's Capital Region Women's Advisory Council

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.

Cristine Cioffi, Esq.

Cristine Cioffi, Esq. is a graduate of Albany Law School and has practiced in the area of trusts and estates and elder law since 1979. She is a member of the Executive Committee of the Trusts and Estates Section of the New York State Bar Association, and the Elder Law Section.

She is the President of The New York Bar Foundation, the charitable arm of the New York State Bar Association, and through the Foundation helps facilitate grants to law-related non-profit organizations across NYS.

Her practice is located in Niskayuna, New York, where she is the President of Cioffi · Slezak · Wildgrube, P.C. She focuses on estate planning (including federal and NYS estate tax issues, charitable gift planning, drafting of Wills, Trusts, Powers of Attorney, Health Care Proxies and Article 81 Guardianships), estate administration (including Surrogate's Courts proceedings and income, gift and estate tax matters), and elder law.

She is immediate past Chair of the Board of Trustees of Ellis Medicine, Schenectady, New York, and serves on The Committee on Professional Standards for the Appellate Division, Third Department.

Cris can be contacted at:

Cioffi • Slezak • Wildgrube, P.C.
2310 Nott Street East
Niskayuna, NY 12309
518-377-6700 phone
518-377-6110 fax
ccioffi@cswlawfirm.com

March, 2015

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Richard D. Cirincione is one of two managing shareholders with McNamee Lochner Titus & Williams, P.C. He joined the firm in 1993 and has been a shareholder since 2002. His practice is concentrated in the areas of estate planning, estate administration, estate litigation, and guardianship law. Richard provides planning for high net worth individuals, including the preparation of sophisticated estate planning devices. He has considerable experience forming and administering family entities, such as family limited partnerships and sales to defective grantor trusts, as well as creating various charitable planning vehicles. Richard handles all phases of the administration of estates and trusts, including the preparation of estate tax returns.

Richard is a frequent lecturer for continuing education programs for the Trusts and Estates section of the New York State Bar Association. He is AV Preeminent rated by Martindale-Hubbell®, has been included in The Best Lawyers in America® since 2013, and Super Lawyers® since 2015.

Richard is admitted to practice law in the states of New York and Florida. He is the former chairperson of the firm's Trusts, Estates, & Elder law practice group. Prior to becoming an attorney, he worked as a Certified Public Accountant. Richard practices in both the Firm's Albany and Clifton Park offices.

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Deborah S. Kearns
Chief Clerk, Albany County Surrogate's Court
Albany County Courthouse, Room 123
Albany, New York 12207
(518) 285-8585

Deborah Kearns works for the New York State Unified Court System as Chief Clerk of the Albany County Surrogate's Court. She started her legal career in private practice where she represented individuals and not-for-profit entities in estate, gift and income tax planning and most recently was on the faculty at Albany Law School. While at Albany Law School, she directed the Tax & Transactions Clinic and was responsible for the coordinated delivery of pro bono legal services through a faculty supervised clinical legal education program. In addition to her work in the clinic, she also taught Trusts & Estates and related courses, and lectured extensively on estate, gift and income taxation as well as on tax controversy matters.

Deborah has been active in the New York State Bar Association throughout her career and currently serves on the executive committee of the Trusts and Estates Law Section as a Vice Chair of the Trusts & Estates Law Section's Taxation Committee and as the Third Judicial District Representative. She was Chair of the Taxation Committee from 2007-2009 and served on the 2009 Ad Hoc committee working on the New York Power of Attorney Legislation. She is a member of the Capital District Women's Bar Association and the Albany County Bar Association and is an adjunct faculty member at Albany Law School. Deborah is a *summa cum laude* graduate of Albany Law School and received her LL.M. in Taxation from New York University.

Law Offices of
Pullano & Farrow
PLLC

Home | Our Team | Services | Contact | Employment

PHONE
585.730.4773 main
585.730.9065 direct
888.971.3736 fax

EMAIL
jlivingston@lawpf.com

MAIL
69 Cascade Drive Suite 307
Rochester, New York 14614

JASON LIVINGSTON

PRACTICE AREAS

- Asset Protection Planning
- Family Wealth Planning
- Retirement Benefit Planning
- Estate and Trust Administration
- Business Succession Planning
- Charitable and Foundation Planning
- Special Needs Planning

BAR ADMISSIONS

- New York

PROFESSIONAL EXPERIENCE

Jason Livingston is a member of the Law Offices of Pullano & Farrow PLLC. He concentrates his practice in the areas of Estate Planning, Business Succession Planning, Long Term Care Planning, Estate Administration, Trust Administration, and Guardianship Petitions.

Mr. Livingston received his J.D. degree from the State University of New York at Buffalo Law School and his B.A. degree, magna cum laude, from East Carolina University.

EDUCATION

- State University at Buffalo Law School, J.D.
- East Carolina University, B.A.

PROFESSIONAL AFFILIATIONS

- Mr. Livingston is an active member of the Monroe County Bar Association and New York State Bar Association. He is also a member of the Trusts and Estates Section of the Monroe County Bar Association.
- Mr. Livingston is an instructor for the Estate Planning Module of the Certified Financial Planner (CFP) Certification Course.
- Mr. Livingston was a member of the Rochester panel for the New York State Bar Association course entitled “Probate and the Administration of Estates.”

COMMUNITY INVOLVEMENT

- Board Member of the Epilepsy Foundation of Greater Rochester
- Board Member of the United Way of Ontario County Endowment Fund
- Committee Member for the Lollypop Farm Planned Giving Council
- Committee Member for the Counselor’s Cup Annual Tournament
- Active participant in the Volunteer Legal Services Project for the Rochester area

Cassandra A. Partyka
Cioffi Slezak & Wildgrube PC
Niskayuna

As an associate at Cioffi • Slezak • Wildgrube P.C., Cassandra works in the areas of estate planning and administration, elder law, real estate, business and corporate law. Her objective for clients is to customize legal services to fit their individual needs.

Cassandra's prior experience was with her father's law office. She had an internship with the New York State Department of Environmental Conservation and worked in the Vermont Law School Legal Clinic.

Cassandra received a B.A. in Psychology from the University of Pennsylvania. She also focused on global water issues, taking eight courses in this area and represented the University of Pennsylvania at World Water Forums in Stockholm, Sweden and Istanbul, Turkey. Cassandra was a varsity sabre fencer while at the University of Pennsylvania. She was recognized as First Team All Ivy, was awarded several letters, and participated as one of the top 24 women in the NCAA Finals. She studied abroad at the University of Queensland in Australia. Cassandra received her law degree and Masters in Environmental Law and Policy from Vermont Law School, cum laude, where she received an academic Excellence Award in Trial Practice, while serving as Co-Chair of the Women's Law Group, was the Research Editor and Summaries Editor for the Vermont Legal Research Group and was a member of Phi Alpha Delta.

Cassandra is a member of the New York State, Saratoga, Warren, Montgomery, Schenectady and Adirondack Women's Bar Associations. She has been involved in the Ronald McDonald House Fashion Show, which takes place every summer at the Saratoga Race Track since 2013, which is a major fundraiser for their facility for families. She has been selected to interview prospective students for the University of Pennsylvania.

Cassandra grew up in Charlton and presently lives in Glens Falls. She was excited to return home to the Capital Region to pursue her career while being close to family and friends. Cassandra enjoys traveling, cooking, arts and crafts and her fantastic dogs, Wookie and Teddie.

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.

5 Emma Lane, Clifton Park, NY 12065 | Phone: 518-881-1621
Empire Theatre Plaza, 11 South Street, Suite 202, Glens Falls, NY 12801 | Phone: 518-409-8534
www.WPLawNY.com | Email: lawyers@WPLawNY.com |Fax: 518-881-1622

Patricia J. Shevy, Esq.
the Shevy Law Firm, LLC

We are dedicated to providing our clients with not only the most appropriate estate or business plan, but one that is clear, easy to understand and will meet the client's needs today and for years to come.

Patricia J. Shevy is the founder of The Shevy Law Firm, LLC, of Albany, New York. Tricia focuses her practice exclusively in the areas of estate planning and administration, elder law and business succession planning.

Tricia believes in the teamwork approach and regularly works with her clients and their investment advisors, bankers, insurance agents and accountants to ensure that the plan meets the client's long term objectives.

Tricia is an active member of the New York State Bar Association- Trusts and Estates Section (former Chairperson and active member of the Life Insurance and Employee Benefits Committee) and Elder Law Section (Co-Chair of the Estates and Tax Committee and member of the Board of Editors of the Elder and Special Needs Law Journal). She is also a member of the Albany County Bar Association, National Academy of Elder Law Attorneys and Schoharie County Chamber of Commerce.

Tricia's past public service includes serving on the Boards of Directors of Childs Nursing Home, Albany County Correctional Facility for Children's Benefit, Rensselaer County Housing Resources Corporation and the Watervliet City School District Board of Education, serving as president for 3 years. Currently, Tricia is on the Board of Directors and Treasurer of The Bus Stop Club, Inc., a support program for the siblings of chronically ill children.

Tricia earned a Bachelor of Science in Management-Finance from Rensselaer Polytechnic Institute in 3 years. Following graduation from RPI in 1994, Tricia received her Juris Doctor, *cum laude*, from Albany Law School of Union University in 1997, where she was a member of the Justinian Society.

Tricia routinely lectures to small groups regarding estate tax planning, long term care planning, estate planning issues for parents of disabled children as well as the unique issues of estate planning for non-traditional families and small business owners. Tricia also regularly lectures and writes for continuing legal education programs offered by the New York State Bar Association.

7 executive Centre Drive
Albany, New York 12203
Phone: 518-456-6705
Facsimile: 518-456-6709
www.shevylaw.com

FACULTY BIOGRAPHIES

New York City

Amy F. Altman
Meltzer Lippe Golstein Breitstone LLP
Mineola, NY

Amy F. Altman is an Associate in the Firm's Trusts & Estates Practice Group. Amy focuses on estate and trust administration, estate planning, and probate litigation. She prepares wills, durable powers of attorney, and health care proxies and various types of trusts, including supplemental needs trusts. Amy understands, from personal experience, that the loss of a loved one can be a tumultuous time for any family. Amy is sensitive to the needs of each individual client and provides them with the time and attention they need to ensure that they understand the probate or administration process.

Amy advises executors, trustees and beneficiaries in contested probate and contested administration proceedings. She has been appointed as a guardian ad litem, by various Surrogates in multiple counties. Amy counsels families and individuals, who are in need of estate planning with the understanding that every family dynamic is different. Amy has a personal interest in planning for families with special needs children, as Amy had the privilege of growing up with her older sister Carol, who was born with cerebral palsy. Amy is a contributor to law.com, the New York Law Journal and the New York State Bar Association Trusts and Estates newsletter.

Amy has an interest in writing about cutting edge topics in trusts and estates, including art law—such as the new ban on ivory, New York's law on posthumously conceived children and ideas for new legislation.

Prior to joining Meltzer Lippe, Amy obtained estate administration and estate planning experience as an associate at Herzfeld & Rubin, P.C.

Lisa Barbieri joined the Office of the Attorney General of the State of New York as an Assistant Attorney General, Charities Bureau, in April 2006. Prior to this appointment, she was a Principal Court Attorney for the New York County Surrogate's Court. Before working for the State of New York, Lisa worked in private practice for five years, concentrating in the areas of tax law and estate planning. Then she joined Coopers & Lybrand, now PricewaterhouseCoopers, LLP, where she worked for seven years, also concentrating on tax law and estate planning. Additionally, Lisa has been a adjunct professor at Fordham Law School, teaching wills and trusts since 2009. Lisa earned an A.B. at the University of Chicago, a J.D. at Boston University School of Law, and a LL.M.. in tax at New York University School of Law.

Jill Choate Beier, Esq.

Jill Choate Beier is an Assistant Professor at Marymount Manhattan College teaching courses in accounting, business law and income taxation. Her research interests focus on the areas of trusts and estates law as well as income, estate and gift taxation. In addition to her teaching responsibilities, Professor Beier acts as the Faculty Advisor and Coach to the MMC Mock Trial Team. The team participates in a regional tournament sponsored by the American Mock Trial Association each year.

Professor Beier involves her students in community service work by coordinating MMC's participation in the Volunteer Income Tax Assistance program which is a nation-wide program administered by the IRS. Professor Beier teaches the student volunteers basic income tax preparation prior to their placement in a VITA site.

Ms. Beier is also a Partner of the McGlashan Law Firm located in New York City where her practice includes a broad range of matters in the personal planning area, including estate and tax planning for individuals and families; estate and trust administration; all aspects of Surrogate's Court practice, including probate proceedings, will contests and guardianships, and planning for charitable giving and philanthropy.

Prior to becoming a partner at MLF, Ms. Beier practiced law at Sullivan & Cromwell LLP and Patterson Belknap Webb & Tyler LLP and has held management positions at large financial institutions such as JP Morgan and Credit Suisse.

Ms. Beier is very active in the New York State Bar Association having held several positions of leadership on various committees of the Trusts and Estates Law Section. Ms. Beier is currently the Chair of the Estate and Trust Administration Committee.

Ms. Beier earned a BBA in Finance from the University of North Texas, an MBA from Fordham University Graduate School of Business (concentration in Professional Accounting), a J.D. from Touro Law School and a LL.M. in Taxation from New York University School of Law.

September 2015

IRINI BEKHIT
COURT ATTORNEY
SURROGATE'S COURT, RICHMOND COUNTY
BIOGRAPHY

IRINI BEKHIT, ESQ.a resident of Staten Island for over 24 years, is an active community leader, serving as a volunteer in many island and state wide organizations. She is also a full time employee of the Richmond County Surrogate's Court, and is currently a Senior Court Attorney.

Growing up on Staten Island, she graduated Staten Island Technical High School and went on to the New Jersey Institute of Technology where she obtained a B.A. in the History of Medicine, Technology and Environment. While attaining her undergraduate degree, she was the president of the Student Government for two years and helped bridge the gap between the administration and student body, while maintaining a high GPA and working part-time at a local Staten Island pharmacy. After graduating NJIT in 2005, she went on to earn her juris doctorate from Rutgers Law. She interned at numerous organizations during her educational career, including the Kings County District Attorney's Office, the ACLU, the Surrogate's Court of Richmond County and the Richmond County District Attorney's Office. In her endeavor to experience different areas of the law, she also worked for a mid-size personal injury firm in NYC, a real estate firm in down-town NYC and a local Staten Island law firm specializing in Trusts and Estates.

Ms. Bekhit began her career in the Surrogate's Court of Richmond County in January 2011 and since then has joined the Board of Director of Meals on Wheels of Staten Island for four years and chaired the 2014 Meals on Wheels Annual Luncheon. She is also an active member of the County Committee of the Richmond County Democratic Party and chaired the annual Gala in 2010. She is also a member of the Trusts and Estates Committee on the Richmond County Bar Association and is the 13th District Representative for the Trusts and Estates Law Section for the NYS Bar Association. She is also the union delegate for the Court Attorney's Association representing Surrogate and Supreme Court attorneys. She joined the faculty of the College of Staten Island, part of the CUNY system in the fall of 2015 and is an adjunct professor teaching Business Law to undergraduate students. She was sworn in as a Director for the Richmond County Bar Association in 2015 and since then has joined the Young Lawyer's Committee as well as the New Members Committee of the RCBA.

As a court attorney, she spearheads the Miscellaneous department, handles conferences, and drafts legal opinions in an effort to assist the Surrogate. She works closely with the Clerk's office and the interns throughout the year. She has presented numerous CLE's to the Richmond County Bar, to the Bay Ridge Lawyers Association and to the New York State Bar Association.

Ms. Bekhit resides in Staten Island, with her husband, Dr. A. Jay Mosses, who is an Ob/Gyn attending physician with RUMC and the Community Health Center of Richmond, as well as her two year old son.

SYLVIA E. DI PIETRO, ESQ., LLC

55 West Fourteenth Street Suite 4H, New York, NY 10011 (212) 242-8800, fax (212) 633-6298

Website: *sylviadipietro.com* E-mail: *femalelitigator@yahoo.com*

Sylvia E. Di Pietro, Esq., LLC provides representation in the area of Elder Law, Article 81 and Article 83 Guardianship petitions and advocacy and related contested accounting and trust matters. The Firm also provides a full range of services with respect to probate, contested probate, complex trust litigation; and administration. The firm also focuses on negotiation and drafting of Risk Management Contracts in the Television, Music and Entertainment Industries.

Sylvia has also been appointed referee and receiver in real estate and guardianship matters. She is a member of the Guardianship Advisory Committee of the New York State Supreme Court, New York County. In 2013, Sylvia taught the first certified course in Elder and Article 81 Guardianship Law as an Adjunct Professor of Law at Brooklyn Law School.

In September 20, 2013, Sylvia was awarded by New York County Lawyers Association the Jack Newton Lerner Award for Excellence in the Contribution of CLE Training. Among the positions she presently holds are Chair of the Elder Law Section, former Vice Chair of the Estates Trusts Section, and present Chair of the CLE Committee for the New York State Bar Association, Trusts and Estates Section.

PRIOR LAW-RELATED EXPERIENCE

Official Court Reporter – Supreme Courts of State of New York, Queens County & Kings County

CORPORATE / EXECUTIVE EXPERIENCE

FORSYTHE INTERNATIONAL LTD., New York, NY – **President of Sales**
Managed a sales force in Premium Incentive and Advertising Specialty industries, promoting creative ideas to Fortune 500 companies. Clients include IBM, TRW, Iams, JC Penny, Shell Oil, Blue Cross/Blue Shield, Deluxe Checking, First Federal Savings, The Guardian, Iowa Film Office, Hyatt, Goldman Sachs & SW Bell Telephone

SYLVIA DI PIETRO CONSULTING, New York, NY
Specialized in the creation and implementation of new business concepts for start-up companies. Developed new businesses; researched and marketed intellectual properties. Created all aspects of public relations, media placement advertising and sales promotional campaigns for celebrity clients. Clients include Princess Elizabeth of Yugoslavia, The Medici Archives, Anthony Quinn, Michael Bolton & Sir John Mills.

SYLVIA E. DI PIETRO, ESQ. : BAR ASSOCIATION & LAW RELATED ACTIVITIES

New York Women's Bar Association

- *Vice President, 2007-08, 2008-09*
- *Recording Secretary, 2006-07*
- *NYWBA Delegate* to Network of Bar Leaders, 2007-08, 2008-09
- *NYWBA Delegate* to Women's Bar Association of the State of New York Board of Directors, 2008-09; previously served as an alternate *Delegate* to WBASNY Board of Directors Meetings (*e.g.*, 9/05, 11/05)

- *Member*, 2007 NYWBA Annual Dinner Committee
- *Co-Chair*, Women's History Month 2007, Commerce Bank Reception Honoring Phyllis Gangel-Jacob
- *Chair and Moderator*, NYWBA Seminar: "Improving Your Employment Potential," 2007
- *Co-Chair,* The Ins and Outs of Financing of Marital Homes In Divorce," American Home Mortgage October 2007
- *Co-Chair*, Inauguration of the Litigation Committee, Commerce Bank Reception, October 2007
- *Event Chairperson*, NYWBA & Three Other Women's Bar Associations, Judith Ripka Private Shopping Event, December 2007
- *Co-Chair*, NYWBA Judges' Reception, January 2008
- *Member,* 2008 Annual NYWBA Dinner Committee
- *Chair,* Saks Fifth Avenue Extravaganza November, 2008
- *Contributing Writer*, NYWBA Newsletter, "What It's Really Like to Practice Law in NYC as a Woman," Summer 2008
- *Co-Chair,* NYWBA Judges' Reception, January 2009
- Organized and promoted NYWBA CLE program, "Ethics Update" March 19, 2009
- *Member,* Committee on Trusts and Estates, 2006 to present
- *Speaker,* Elder & Disabilities Committee, "Role and Responsibilities of Trustees of Supplemental / Special Needs Trusts" - Thursday, January 31, 2013

New York County Lawyers Association- Member of the Board of Directors

- *Board Member,* Appointed to the NYCLA Board of Governance, May 2009-May 2013
- *Delegate to the NYSBA House of Delegates,* May 2009 to May 2013
- Member- NYCLA Foundation, Fundraising Committee to present
- *Chair*- Estates Trust Section 2008-2010. Duties include membership, "Meet & Greets," development and sponsorship of NYCLA & Section CLEs 2008-2010.
- *Vice-Chair*- Estates Trust Section 2008-2014. Duties include membership, "Meet & Greets," development and sponsorship of NYCLA & Section CLEs 2010 to present.
- *Chair*-Elder Law Section 2013 to present. Duties include membership, "Meet & Greets," development and sponsorship of NYCLA & Section CLEs 2013 to present.
- *Delegate* to Network of Bar Leaders as Representative for President, Ann P. Lesk, 2009-10.
- Member, Communications Committee
- Member Continuing Legal Education Committee
- Member Library Committee
- Past *Chair* of Real Property Section 6/2004-6/2008, *Co-Chair* of Committee on Condos & Coops *6/2004 to 6/2007.* Duties include membership, "Meet & Greets," development and sponsor of Bar Association & Section CLEs; creator, NYCLA Express Real Estate Online Forms.
- Member-Section on Trusts & Estates; Member-Legislative Committee; prepared Section Legislative Report
- Speaker, CLE Seminar, Blueprint for Building Your Practice October 28-29, 2005, October 20-21, 2006
- *Chair*, "The Great Debate over the City's West Side Stadium," March 2005
- *Chair, Citywide Bar Reception:* Christine Quinn Reception 2006
- *Chair ,* Estates Trusts Section*:* Ruth Lewinson Memorial Lecture, March 2009
- Speaker, CLE Seminar, Detecting Forgery, May 2009
- Member, NYCLA Board Committee on Communications
- Member, NYCLA Board, Committee on CLE
- Speaker, CLE Seminar, Bridging the Gap, topic: "Probate," August 2009
- Mentor, NYCLA Task Force on Professionalism, August 2009
- Speaker, CLE Seminar, Ethics in Trusts and Estate Transactions, September 2009
- Speaker, CLE Seminar, Bridging the Gap, topic: "Probate," October 2009
- Mentor, NYCLA, Ethics Institute, 2009-2010
- Speaker, CLE, Not for Profit Boards, October 2009
- Event Committee, Fall Nina McLemore Fashions, November 2009
- Mentor, NYCLA Pilot Mentoring Program, 2010 and 2011
- Speaker, CLE, Bridging the Gap, "New NYS Power of Attorney Form"- Jan. and Aug., 2010

- Speaker, CLE, "Planning for Non-Traditional Couples"-Jan. 25, 2010
- Member, NYCLA Membership Task Force
- Speaker, CLE, "Estate Planning for Real Estate Owners," October 2010
- Speaker, CLE, "Bridging the Gap," The New NYS Power of Attorney Form, April 2011
- Speaker, CLE, "What's Next in Estate Planning," with Trusts & Estates Magazine, May 2011
- Member, NYCLA Special Committee/Task Force Re: Membership
- Speaker, NYCLA. Bridging the Gap, "New NYS Power of Attorney Form," July 2011
- Promotions, NYCLA Bar Foundation, Fall Founders Cocktail Party
- Member, NYCLA Task Force on Judiciary Budget Cuts 2011 & creator of Task Force Questionnaire, Chair of Guardianship Subcommittee and member of Surrogate's Committee
- Panelist/Speaker, NYCLA Task Force Public Forum on Judiciary Budget Cuts December 2, 2011
- Speaker, NYCLA CLE, "New NYS Power of Attorney Form," December 2011
- Speaker, NYCLA CLE-Introduction to Guardianship Law, May 2012
- Speaker, NYCLA CLE-Introduction to Guardianship Law, July 2012
- Speaker, NYCLA CLE-Introduction to Guardianship Law, March 2012
- Speaker, NYCLA CLE-Guardianship and Landlord Tenant Law September 20, 2013
- NYCLA appointment to New York Supreme Court Guardianship Advisory Board
- Speaker, NYCLA CLE-Introduction to Guardianship Law, December 2013
- Member, Mentoring Committee

NYCLA AWARDS

- Jack Newton Lerner Award for Excellence in the Contribution of CLE Training, September 2013

New York State Bar Association

- *Chair, former Vice-Chair of CLE Section, Executive Board Member,* Section on Trusts and Estate; Committee on Elderly and Disabled; Committee on Estate Litigation; Pre-Mortem Will Contest Subcommittee
- *Contributing Author,* New York State Bar Association Litigation Committee's volume on New York Will Contests, *Co-Author,* chapter on "Undue Influence" (anticipated publication 2013)
- *Member,* Section on Elder Law
- *Member,* Commercial and Federal Litigation Section
- *Member, Select Appointment to Committee on Cyberspace Law,* 2003-2004
- *Speaker,* Contested Accountings, New York, December 2009
- *Speaker*, "SCPA Discovery §2103, §2104 and §2105," June 2011
- *Speaker*, CLE, "Powers of Attorney Practice and Litigation Under the New Law, Remedies," June. 2012
- *Statewide Co-Chair*. CLE, "Practical Skills: Probate and the Administration of Estates," Fall 2012
- *Statewide Co-Chair,* CLE, "Contested Accounting Proceedings in Surrogate's Court: The Law and
- Techniques You Should Know- Spring 2013
- *Statewide-Co-Chair,* CLE, "Discovery Proceedings in Surrogate's Court: How to Fight Them and How to Avoid Them"-June 2014
- *Statewide Chair*, CLE, "Introduction to Estate Planning"-November 2015

New York City Bar Association

- *Member,* Council on Judicial Administration, 2008-present;
- *Chair,* Subcommittee on Guardianship Law 2008-present
- *Member,* Committee on State Courts of Superior Jurisdiction, 2005-07
- *Speaker,* CLE, Detecting Forgery, Spring 2009
- *Speaker,* CLE, Power of Attorney, Summer 2009
- *Chair,* First Department Judicial Guardianship Roundtable, November 2009
- *Chair,* Subcommittee on Judicial Nominations, *Member,* Committee on Judicial Conduct
- *Speaker,* Law Week Public Forum: Planning for Late in Life, May 2011
- *Speaker,* Matrimonial Committee- Guardianship Law and Powers of Attorney

Network of Bar Leaders
Board member, Representative for Columbian Lawyers Assn. 2010-2011

Columbian Lawyers Association, First Judicial District
- *Publicity Chair*, 2010 to present
- *Speaker,* CLE, "New York's New Power of Attorney," Spring 2010

Jewish Lawyers Guild, member in good standing

American Bar Association, 2002-2006

NATIONAL ACADEMY OF CONTINUING LEGAL EDUCATION
National Speaker, "Power of Attorney," Spring 2012

PRO BONO ACTIVITIES
- Pro Bono Employer/Mentor of paralegal students with CUNY's Associate Degree Program at New York City College of Technology, Legal Assistant Studies Department 2006-2010
- Counseling in matrimonial matters

COMMUNITY BOARD 5 2011-2013
- General Board Member of Community Board 5 in New York City
- Committee Member of Consents and Variances Committee 2011-13
- Committee Member of Education, Health and Human Services Committee 2011-13
- Committee Member of Housing, Human Services & Youth 2011-13
- Committee on Vendor Investigations
- Opposition-Jamestown Plan for Chelsea Market
- DOITT's Request for information /Sidewalk Based Telecommunication Devices

COMMUNITY SERVICE SOCIETY, NYC
Formed in 1939 by the merger of two venerable social service agencies: The New York Association for the Improvement of the Condition of the Poor (founded in 1843) and the Charity Organization Society (founded in 1882). Organization that fights poverty, access to healthcare, Affordable Housing, Disconnected Youth, Economic Security, Imprisonment and Re-entry and Workforce Poverty.

- Trustee, Member of the Board of Trustees-2011 to Present
- Member of Communications Committee
- Member of Committee on Development

UNITED NATIONS
Speaker, Sixth Session of the Conference of State Parties to the Convention on the Rights of Persons with Disabilities, 18th July 2013

Speaker, United Nations, "First Convocation of First Ladies of Africa, Latin America and Caribbean Nations," Women in Politics, September 24, 2013

COMMUNITY & POLITICAL ACTIVITIES-*Democratic State Committee Person 75th A.D.*
- *Member*, Independent Judicial Screening Panel, Civil Court, City of New York, 2004
- *Member,* Host Committee, "Show Up for Cocktails" Event at which Leecia Eve, former counsel to Senator Hillary Clinton, announced formation of "SHOW UP New York" to mobilize young voters, June 2006

- *Judicial Panel Administrator*, Democratic Party, First Judicial District for the Selection of Civil Court Judges, 2008
- *Member*, Independent Judicial Screening Panel, Civil Court, City of New York, 2010
- *Democratic County Committee Person*, Political District 83/66 2012-2013
- *Delegate: Democratic Judicial Convention,* September 24, 2012 to present
- *Executive Committee Member*, Chelsea Reform Democratic Club, September 2012 to present
- *New York State Democratic Committee,,* State Committee Person, 75th A.D. 2012 to present
- *Chair, Executive Committee, Nomination's Committee*, Chelsea Reform Democratic Club 1/2013
- *Chair, Executive Committee, Nomination's Committee*, Chelsea Reform Democratic Club 12/2013
- *Chair, Executive Committee, Nomination's Committee,* Chelsea Reform Democratic Club 2014
- *Female District Leader, 75th AD Part A 2014 to present*

PROFESSIONAL ACTIVITIES

- *Member,* National Organization of Italian American Women
- *Member,* Brooklyn Law School, Alumni Association; Judge, Prince Moot Court Competition, 2001-present
- *Member,* Italian American Law Students Association
- *Member,* Health Business Alliance 2010

MEDIA AND PUBLICATIONS

- *Author*, Verdict, "Crisis in Guardianships," National Coalition of Concerned Legal Professionals, Jan. 2010
- *Author,* Verdict, "Impact of the New Power of Attorney Form in New York," Jan. 2010
- *Author,* Live Your Life by the Numbers (Penguin Books, 1991)
- *Contributing Writer,* Nuvo News-Minneapolis, MN
- *Author*. NYSBA Chapter on "Undue Influence," presently pending publication

MEDIA APPEARANCES and SPEAKING ENGAGEMENTS

- 100+ national radio and television appearances and celebrity & political profiles, including on *The Montel Williams Show, Phil Donohue Show, Maury Povich, The Joan Rivers Show, Geraldo, CBS This Evening, NBC This Evening*, MSNBC, NYBC, Lifetime Television, BBC, Cablevision, WABC, WCBS. WMWK, WMCA, WOR, WLIB, KBX, WOOD
- *Featured,* New York Magazine, April 2008, "New York's Women's Leaders in the Law."
- *Featured speaker on national radio programs:* retirement and estate planning, relationship conflicts over money, prenuptial agreements, the Boston Catholic Church, cyber adultery, father's rights, custody issues
- *Featured Speaker:* "Backwards in Heels," Women's Networking Forum, First American Title Company, The Adventure Group, September 2008
- *Featured Speaker:* "Bath Junkie," Dr. Robert Sorin: Health, Comfort & Beauty, 1/15/09.
- *Featured Speaker:* "Just Us Girls," Women's Networking Group, 1/16/09.
- *Keynote Speaker*, National Coalition of Concerned Legal Professionals, May 2011 Reception-The Elder Law Crisis
- *Speaker,* National Coalition of Concerned Legal Professionals, ''Plan for Aging,'' October 5, 2012
- *Internet Speaker,* Consumermojo.com, Barbara Nevins Taylor, The Power of Attorney, 2013
- *Speaker*, United Nations, New York, ''The Interface Between Aging and Disability,'' July 18. 2013.
- *Speaker,* United States Court of International Trade, Preparing for Aging, September 30, 2015

Stern Keiser & Panken LLP

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Laurence Keiser

Partner
lkeiser@skpllp.com
Phone: 914-428-8800

Laurence Keiser practices in the areas of tax planning and litigation, and estate planning and administration. Mr. Keiser received his B.S. in Accounting, 1971, and a Master of Laws (in Taxation), 1978, from New York University and his J.D., 1975, from St. John's University. He has long been a regular lecturer for the Annual Estate Planning Institute of the Practicing Law Institute, and a member of the Westchester County, New York State and American Bar Associations. He is also a CPA and has served as an officer and executive committee member of the New York State Society of CPA's and as President of its Westchester Chapter. He is a nationally known author and lecturer on tax subjects.

Areas of practice:
Estate and Business Succession Planning
Tax Planning and Controversies

- Susan H. Accetta
- David B. Augenbaum
- Jamieson L. Keiser
- Laurence Keiser
- Judith B. Kunreuther
- Kelley T. Mikulak
- Andrew I. Panken
- David M. Stern

1025 Westchester Ave.
Suite 305
White Plains, NY 10604
Phone: 914-428-8800
Fax: 914-428-3199

60 East 42nd Street
47th Floor
New York, NY 10165
Phone: 212-370-5970

Ian W. MacLean, Esq.
MacLean Law Firm, P.C.

60 East 42nd Street, 40th Floor
New York, NY 10165
212-682-1555

100 S. Bedford Road, Suite 340
Mt. Kisco, NY 10549
914-293-1008

ianwmaclean@mlfpc.com

Ian W. MacLean is the managing attorney of the MacLean Law Firm, P.C. While Mr. MacLean focuses his practice on traditional trusts and estates litigation and has successfully handled numerous cases for clients in the Surrogate's and Supreme Courts of New York, he devotes a significant part of his practice to resolving controversies through negotiation and customized solutions. His firm specializes in representing beneficiaries who rights and interests are not being respected and fiduciaries who are seeking to fulfill their responsibilities despite challenges from competing beneficiary interests. For several years Mr. MacLean focused on estate planning for high net worth and family business clients, and managed relationships as a trust officer. He is AV Peer Review Rated, Avvo rated 10/10, and is elected to New York Super Lawyers.

Mr. MacLean is an active member on the Executive Committee of the New York State Bar Association, Trusts & Estates Law Section, where he is currently the District Representative for the 1st Judicial District and a vice-chair of the Surrogate's Court Committee. He is formerly co-chair of the Legislation and Governmental Relations Committee, chair and Editor-in-Chief of the Newsletter and Publications Committee, and chair of the Estate Planning Committee. He is also a member of the NYC Bar Association and the Westchester County Bar Association. He has chaired meetings in New York State and Florida for the Trusts and Estates Law Section and lobbied for three years in Albany on behalf of the Section to pass bills improving the trusts and estates laws of New York State. Mr. MacLean has written and spoken for the NYS Bar Association and other organizations on multiple trusts and estates topics, including the enforcement of exculpatory clauses, in terrorem clauses and retention clauses; the role of the Charities Bureau of the NYS AG in estate and trust proceedings; planning to avoid litigation over testamentary disposition; pitfalls in the New York marital right of election; and the importance of designating an agent for the disposition of one's earthly remains. Mr. MacLean is also the editor of the chapter on "Jurisdiction of the Surrogate's Court" in *Probate and Administration of N.Y. Estates*, published by the NYSBA.

March 2015

KEVIN MATZ is the managing attorney of Kevin Matz & Associates PLLC, with offices in Midtown Manhattan and White Plains, New York, where his practice is principally devoted to domestic and international estate and tax planning, estate administration and related litigation. Mr. Matz earned his J.D. from Fordham University School of Law (where he was a Notes & Articles Editor of the *Fordham Law Review*) and his LL.M. in Taxation from New York University School of Law, and was a senior associate in the private clients group of White & Case LLP and a Partner at a medium-sized law firm in Midtown Manhattan prior to starting his own law firm in 2009. He is a Fellow of the American College of Trust and Estate Counsel ("ACTEC"), and a member of the New York City Bar Association, the New York State Bar Association and the New York State Society of Certified Public Accountants (the "NYSSCPA"), among other professional organizations, and has helped to draft several of the City Bar's, the State Bar's and the NYSSCPA's comment letters to both the United States Department of Treasury and the New York State legislative and executive branches.

Mr. Matz has written and spoken extensively about the use of family limited partnerships and various other leveraged transfer techniques, as well as estate planning strategies for groups ranging from private equity fund managers to professional athletes, and has been frequently cited in the professional literature (including at the Heckerling Institute on Estate Planning) for his innovative solutions and analysis. In addition, Mr. Matz is the co-author of two estate planning treatises, *Manning on Estate Planning* (Practicing Law Institute 2015), and *Estate Planning for Professionals – Understanding What is Needed for Estates of Any Size* (Cannon Financial Institute 2009), and is a certified public accountant, in which connection he is a past Chairman of the Estate Planning Committee of the NYSSCPA, a past Chairman of the NYSSCPA's Entertainment, Arts and Sports Committee, and currently a member of both the NYSSCPA's Board of Directors and the Foundation for Accounting Education's Board of Trustees. Further, Mr. Matz currently serves as Vice Chair of the UJA-Federation of New York Lawyers Division Trusts & Estates Group and is also a member of its Accountants Executive Committee.

Mr. Matz may be contacted at 914-682-6884 or kmatz@kmatzlaw.com.

WILK AUSLANDER

Marc Selden

Counsel

+1 212 421 2902
mselden@wilkauslander.com

Wilk Auslander LLP
1515 Broadway
New York, NY 10036
T 212 981 2300
F 212 752 6380
wilkauslander.com

Overview

Marc Selden is Counsel in the firm's Trusts & Estates and Tax Practice. Marc's practice focuses on the design and implementation of estate, business succession, and asset protection plans that achieve the objectives of the individuals, families, and business owners he represents.

Marc's approach is to make the complex simple by asking the right questions to fully understand his clients' concerns, to identify potential problems, and develop solutions that accomplish the clients' goals. His ultimate objective is to implement a plan that provides comfort and confidence to his clients. Marc's expertise, combined with the firm's processes, enables him to meet our clients' objectives in a practical, comprehensive, and efficient manner.

Prior to joining Wilk Auslander in 2015, Marc had been the managing attorney of his own firm, Selden Law Group, P.C., an estate planning boutique, for 14 years. Previously, Marc practiced civil litigation in the New York market.

Marc has received a "Superb -10/10" rating from the Nationally Recognized Attorney Rating Service, 'AVVO' for 2009, 2010, 2011, 2012, 2013, 2014, 2015, and 2016.

Service Areas

Tax

- International Transactions

Trusts & Estates

- Administration
- Asset Protection
- Estate Planning

Education

Boston University School of Law, LL.M., Taxation, 2015, Class rank: 5th out of 66 (2014/2015 graduates)

Syracuse University College of Law, J.D. (1993)

State University of New York at Albany, B.A., cum laude (1990)

Bar Admissions

New York

United States District Court for the Southern District of New York

United States District Court for the Eastern District of New York

Affiliations

- Wealth Counsel; President of the WealthCounsel NY/NJ Forum – 2009 to present
- New York State Bar Association, Trusts and Estates Section
- International Fiscal Association – 2014 to present
- Laureate Center for Wealth Advisors – 2009 to present

FACULTY BIOGRAPHIES

Rochester

NIXON PEABODY

THOMAS J. D'ANTONIO

Thomas D'Antonio is an associate in Nixon Peabody's Private Clients group. He concentrates his practice in the areas of Estate Planning and Estate and Trust Administration.

What do you focus on?

I design and implement plans for individuals and families with diverse estate planning objectives, including drafting wills, revocable trusts, charitable trusts, irrevocable gift trusts and irrevocable life insurance trusts. I have significant experience using a variety of techniques and vehicles to transfer wealth to the next generation while minimizing income and transfer taxes. I also have experience working with families in estate administration matters from the probate process through the distributions to beneficiaries and settlement.

I have represented corporate and individual trustees and executors, as well as beneficiaries, in various judicial matters, including trust construction matters, fiduciary litigation matters and proceedings to modify trusts.

Additionally, I am able to represent clients with respect to tax matters and disputes with the Internal Revenue Service and state and local taxing authorities. I also counsel public charities and private foundations on federal tax matters.

What do you see on the horizon?

As technology evolves and becomes more intertwined with our lives, we also need to evolve the way we think of "traditional" estate planning. Taking things like digital assets into account when crafting one's estate plan is a way to help better serve our clients. Being on the forefront of this area of law helps to provide clients with the flexibility, security and peace of mind that they deserve.

CONTACT

Thomas J. D'Antonio
Associate

Rochester
Phone: 585-263-1260

Fax: 855-689-9176
tdantonio@nixonpeabody.com

SERVICES

Private Clients, Estate, Trust & Financial Planning
Estate & Gift Planning
Estate Administration
Executive Planning Services
Income Tax Planning & Preparation
Trust & Fiduciary Services
Trusts & Estates Litigation

EDUCATION

College of William & Mary Marshall-Wythe School of Law, J.D.
Loyola College in Maryland, B.A., Political Science and Writing

ADMISSIONS

New York

AFFILIATIONS

Thomas serves on the Young Alumni Board of McQuaid Jesuit High School and volunteers at Nativity Preparatory Academy. He is a member of the New York and Monroe County Bar Associations.

Karin Sloan DeLaney
Sloan DeLaney P.C.

Karin Sloan DeLaney is the principal attorney at Sloan DeLaney P.C. With nearly 20 years of experience in Trusts and Estates law, Elder Law, Special Needs Planning and Tax Law, Karin counsels clients in all aspects of estate planning and administration including the preparation of wills and trusts, estate tax planning, long term care planning and business succession.

Karin is a Syracuse native and a graduate of the State University of New York at Albany (B.A.), Western New England University School of Law (J.D.) and Syracuse University College of Law (LL.M. Taxation). She is a frequent lecturer and author of a variety of estate planning topics for the public and professionals.

A runner, triathlete and Syracuse University basketball fan, Karin enjoys life in Syracuse with her husband and children.

MARCY ROBINSON DEMBS

Barclay Damon LLP
Syracuse

Marcy Dembs focuses her practice in the area of estate planning, trust and estate administration, and estate-related litigation with a special interest in Supplemental Needs Trusts and the representative needs of the disabled. Marcy has been practicing for over 30 years throughout Central New York while maintaining a large presence in the North Country, furthering her commitment to families and business owners in New York. Marcy serves as Co-Chair of the firm's Trusts & Estates Practice Area.

In addition to practicing in New York, Marcy is also admitted to practice in Florida and uses her insights to help clients take better advantage of estate tax laws. Marcy frequently speaks before groups of professionals including State bar attorneys, certified public accountants and financial planners, in addition to not-for-profit administrators which serve disabled individuals and their families. She also has offered legal insight on several Central New York television programs such as WWNY's "Noon Newscast" and WCNY's "Financial Fitness."

From litigating assets wrongly removed from an estate by an agent using a power of attorney, to assisting farmers and business owners with succession planning and transfers, Marcy's goal is to listen well and educate her clients so they can make informed decisions regarding their estate and business plans.

Marcy is a strong supporter of the Women's Forum. As a mother of two, having practiced since 1985, she has seen firsthand the importance of an effort dedicated to support women and help them find balance in their family lives and practice.

Representative Experience

Successfully used Constructive Trust theory to recover life insurance proceeds wrongly diverted from decedent's children to surviving spouse in violation of children's mother's separation agreement with decedent.

Successfully litigated to replace Trustee based on breach of fiduciary duty for lack of diversification of portfolio and excessive fees.

Created and funded numerous Supplemental Needs Trusts in Wills. Used post mortem judicial reformation and pursuant to regulations for inter vivos trusts to position disabled adults to qualify for critically needed governmental medical assistance.

Successfully defended Will contest by decedent's immediate family in favor of Will beneficiaries in litigation involving choice of law principals and complex issues of proof.

Routinely represents estate planning needs of non-citizens addressing unique estate and gift tax ramifications of their status.

R. Thompson Gilman
Partner
Woods Oviatt Gilman LLP,

Education
Albany Law School, J.D.
University of Vermont, B.A.

Bar Admissions
States of New York and Florida

Profile Education Representative Matters Affiliations
Tom Gilman is a Partner in the firm and Chair of the Family Wealth & Estate Planning Department, where his practice is concentrated in estate planning, trust and estate administration, probate and estate tax law.

Practice Areas

Asset Protection Planning

Business Succession Planning

Elder Law/Long Term Health Care and Medicaid Planning

Estate & Trust Administration

Estate & Trust Taxation

Family Wealth Planning

Florida Estate & Trust Practice

Retirement Benefit Planning

Special Needs Planning

Charitable and Foundation Planning

Nancy Klotz is Vice President and Senior Trust Counsel with Tompkins Trust Company. She has over fifteen years of experience in private practice, advising individuals and corporate fiduciaries on sophisticated estate planning techniques, estate and trust administration, probate and tax law. At Tompkins, Nancy is responsible for developing estate planning strategies for clients. She works closely with clients' legal, tax and investment advisors to design, implement and administer appropriate trust and estate plans.

Nancy received her B.A. degree from Yale College and her J.D. degree from the University of California, Los Angeles, School of Law, Order of the Coif. She is a member of the Executive Committee of the Trusts and Estates Section of the New York State Bar Association, the Executive Committee of the Trusts and Estates Section of the Monroe County Bar Association, the Estate Planning Council of Rochester, and the Planned Giving Advisory Council of the University of Rochester. She has lectured to both professional and lay groups on estate planning topics.

LEVENE GOULDIN & THOMPSON, LLP
ATTORNEYS AT LAW

Main Office:
450 Plaza Drive
Vestal, NY 13850
Phone: 607.763.9200
Fax: 607.763.9211

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Albert B. Kukol

LGT Partner
Assistant Managing Partner
akukol@lgtlegal.com
akukol@lgtlegal.com
607-584-5705

Download vCard

LGT Vestal Office
450 Plaza Drive
Vestal, New York 13850
607-763-9200 main
607-763-9211 fax

Practice Areas

- Elder Law and Special Needs
- Trusts and Estates
- Guardianship
- Tax Practice (Chair)

Legal Secretary

Erin Handzel
ehandzel@lgtlegal.com
ehandzel@lgtlegal.com
607-584-5622

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Education

- A.B., Anthropology, College of William & Mary (1975)
- M.B.A., Finance, State University of New York at Binghamton (1977)
- J.D., magna cum laude, Albany Law School of Union University (1990)

Admissions

- New York Bar (1991)
- Pennsylvania Bar (2010)

Professional Background and Activities

- Broome County Bar Association
- New York State Bar Association (Section on Trusts and Estates, Member and Lecturer, Section on Elder Law, Member and Lecturer-Executive Committee)
- CERTIFIED FINANCIAL PLANNER ™ Certification
- Academy of Special Needs Planners
- Financial Planning Association of the Southern Tier of New York, Inc. (Member and Director)
- To Trust or Not to Trust - Speaker to the Broome County Bar Association, Nov. 5th, 2015

Honorary Recognitions

- New York State Bar Association 2004 President's Pro Bono Service Attorney Award
- Selected for inclusion in "The Best Lawyers in America®" in the area of Elder Law
- Selected for inclusion in New York Super Lawyers, Upstate Edition

Community Activities

- The Shore Owners Association of Chase's Lake, Inc. (Director)
- NYSARC, Inc. Broome-Tioga County Chapter, dba Achieve- Guardianship Committee

Publications

- Co-Author, "Creditor's Claims -- Do They Die With the Debtor?" NYSBA Journal (Feb. 2006) p. 18
- Co-Author, "The Conflicting Rights of Creditors and Beneficiaries in a Decedent's Estate -- An Examination of the Laws of New York, New Jersey and Connecticut" (2006)

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Law Offices of
Pullano & Farrow
PLLC

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PHONE
585.730.4773 main
585.730.9065 direct
888.971.3736 fax

EMAIL
jlivingston@lawpf.com

MAIL
69 Cascade Drive Suite 307
Rochester, New York 14614

JASON LIVINGSTON

PRACTICE AREAS

- Asset Protection Planning
- Family Wealth Planning
- Retirement Benefit Planning
- Estate and Trust Administration
- Business Succession Planning
- Charitable and Foundation Planning
- Special Needs Planning

BAR ADMISSIONS

- New York

PROFESSIONAL EXPERIENCE

Jason Livingston is a member of the Law Offices of Pullano & Farrow PLLC. He concentrates his practice in the areas of Estate Planning, Business Succession Planning, Long Term Care Planning, Estate Administration, Trust Administration, and Guardianship Petitions.

Mr. Livingston received his J.D. degree from the State University of New York at Buffalo Law School and his B.A. degree, magna cum laude, from East Carolina University.

EDUCATION

- State University at Buffalo Law School, J.D.
- East Carolina University, B.A.

PROFESSIONAL AFFILIATIONS

- Mr. Livingston is an active member of the Monroe County Bar Association and New York State Bar Association. He is also a member of the Trusts and Estates Section of the Monroe County Bar Association.
- Mr. Livingston is an instructor for the Estate Planning Module of the Certified Financial Planner (CFP) Certification Course.
- Mr. Livingston was a member of the Rochester panel for the New York State Bar Association course entitled “Probate and the Administration of Estates.”

COMMUNITY INVOLVEMENT

- Board Member of the Epilepsy Foundation of Greater Rochester
- Board Member of the United Way of Ontario County Endowment Fund
- Committee Member for the Lollypop Farm Planned Giving Council
- Committee Member for the Counselor’s Cup Annual Tournament
- Active participant in the Volunteer Legal Services Project for the Rochester area

Rachelle H. Nuhfer, Esq.
Lacy Katzen LLP
Rochester

Associated Practice Areas:
Estate and Trust Planning; Business Succession Planning; Trust and Estate Administration; Business and Corporate Law; Trust and Estate Litigation.

Rachelle works closely with clients to understand the clients' needs and to develop a strategic estate plan that best protects the clients' assets while achieving the clients' planning objectives. Rachelle counsels clients in all estate planning matters including the preparation of wills, trusts, powers of attorney, health care proxies, and beneficiary designations.

Rachelle also counsels clients regarding various business and corporate law matters, including formation and structuring of business entities, mergers and acquisitions, and succession planning.

Before joining Lacy Katzen LLP, Rachelle spent two years as an Appellate Court Attorney with the Appellate Division, Fourth Department, where she handled both civil and criminal appeals.

Education:
University at Buffalo Law School (J.D.), *Summa Cum Laude*;

St. Bonaventure University (B.A.), *Summa Cum Laude*.

Admissions:
New York State Bar

Florida State Bar

Professional and Community Affiliations:
Rachelle is a member of the New York State Bar Association, the Monroe County Bar Association, the Greater Rochester Association for Women Attorneys, and the SUNY Buffalo Law Alumni Association.

Rachelle is also a volunteer with the Volunteer Legal Services Project of Monroe County.

Anthony T. Selvaggio: Mr. Selvaggio is a 1994 graduate of the State University of New York at Buffalo, School of Law and a 1991 graduate of St. John Fisher College. He concentrates his practice in the areas of wealth transfer planning, the drafting of Wills and trusts, and representing individual and corporate fiduciaries in the administration of estates and trusts. He has over a decade of experience in counseling clients in sophisticated planning techniques used to minimize estate, gift, and income taxes while addressing his clients' personal and family estate planning goals. He practices with the firm of Jill M. Cicero & Associates in Rochester, NY.