

PROBATE AND THE ADMINISTRATION OF ESTATES

THURSDAY, OCTOBER 27, 2016
New York City

FACULTY BIOGRAPHIES

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



SYLVIA E. DI PIETRO, ESQ., LLC

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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*
 - *Statewide Chair, Continuing Legal Education Statewide Noontime Webcast Programs*
 - *Statewide Chair, Estate Planning and Will Drafting, Spring 2016*

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
- *Speaker*, Staten Island Bar Association, “Introduction to Estate Planning,” –June, 2016

Douglas H. Evans, Esq.
Sullivan & Cromwell, LLP
New York, NY

Doug Evans has extensive experience in estate administration, tax planning and charitable organizations. He has worked on a number of estate litigations, including the Johnson will contest and the Donner estate accounting that went to the Court of Appeals.

Mr. Evans heads the Firm's pro bono AIDS clinic at New York Presbyterian Hospital. He has lectured widely for various bar associations, Practising Law Institute and the NYU Tax Institute. Doug is the co-author and editor-in-chief of *Probate and Administration of New York Estates*, now in its second edition.



Ian W. MacLean, Esq.

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Ian W. MacLean is the managing attorney of The MacLean Law Firm, P.C. Mr. MacLean is a trust and estate litigation attorney. He focuses his practice on litigation in the Surrogate's Court, fiduciary responsibility and liability, fiduciary taxation, and counsel to beneficiaries and fiduciaries in non-litigated probate and estate and trust administration and accounting. Mr. MacLean devotes significant time to resolving trusts and estates controversies through negotiation, alternate dispute resolution, and outside the box solutions.

Mr. MacLean is AV rated by Martindale-Hubbell Peer Review, peer elected to Super Lawyers, and rated 10/10 on AVVO. A magna cum laude graduate of St. Lawrence University, he holds a J.D. cum laude from New York Law School and an LL.M. in taxation from New York University School of Law.

Mr. MacLean is an active member of 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 a 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 lobbied for three years in Albany on behalf of the Section to pass bills improving the trusts and estates laws of New York State. He has co-chaired meetings in New York State and Florida for the Trusts and Estates Law Section. He is also a member of the NYC Bar Association, Committee on Trusts, Estates & Surrogate's Court and the Westchester County Bar Association, Trusts and Estates Section.

Mr. MacLean is the editor of the chapter on "Jurisdiction of the Surrogate's Court" in *Probate and Administration of N.Y. Estates*, NYSBA, 2nd ed. (G. Mund & D. Evans, eds). Mr. MacLean writes and lectures for the NYSBA and other organizations regularly on diverse trusts and estates topics, including ethical and professional conduct; probate; 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 dispositions; and pitfalls in the New York marital right of election statute.

Lori J. Perlman, Esq., Princeton Junction, NJ

Lori J. Perlman provides legal services individually and serves as independent counsel for major law firms in New York. Previously, she spent over 11 years as Of Counsel to The Law Offices of Hugh Janow in Pearl River, New York. She specializes in Surrogate Court practice and procedure and contested Surrogate's Court proceedings.

Lori has over 20 years of Trusts & Estates experience. Prior to joining Hugh Janow, Lori was an attorney in the Private Clients Group at White & Case in New York for over five years, serving as the liaison between the Litigation Department and the Private Clients Group. Lori left White & Case to join the staff of the New York County Surrogate's Court as a Court Attorney Referee, where she supervised settlement conferences and presided over fact-finding hearings. Lori was later an attorney in the Trust & Estates departments of Graubard, Mollen & Miller, and Brauner Baron Rosenweig & Klein, both in New York City.

Throughout her career, Lori has helped families resolve estate related disputes, sometimes through negotiations, and other times through litigation where negotiation fails. She has also negotiated and drafted contested marital agreements and complex Wills and Trusts, and has provided counsel to individual and corporate fiduciaries.

Lori is an active member of the Trusts and Estates section of the New York State Bar Association, serving as a current member and the past Chair of the Practice and Ethics Committee and a member of the Surrogate's Court Committee, and previously serving as vice-chair of the Technology Committee. Lori has also presented informational seminars on Estate Planning, Health Care Proxies and Living Wills to various community groups in New York and New Jersey.

Education:

SUNY Albany, 1987, Bachelor of Arts *cum laude* in psychology,

Fordham University School of Law, 1993, JD *cum laude*; Order of the Coif; Law Review

Ashwani Prabhakar

Court Attorney-Referee, Orchard Park, NY

Ashwani Prabhakar has been a court attorney to Surrogate Margarita López Torres for five years. He was also an associate at Greenfield Stein & Senior, where his practice focused solely on trusts and estates litigation. Mr. Prabhakar is a former adjunct professor at New York Law School and former member of the City Bar's Trusts, Estates and Surrogate's Court Committee. His articles have been published in The New York Law Journal, The Buffalo Law Journal, and the N.Y.S.B.A.'s Trusts and Estates Section newsletter.

Dan Rottenstreich Bio

Dan Rottenstreich is a partner at Cohen Clair Greifer Thorpe & Rottenstreich, LLP.

Mr. Rottenstreich has extensive experience handling complicated financial and custody cases, including many with international components. With a unique combination of accounting knowledge as a CPA and a career honing his litigation skills, Mr. Rottenstreich has litigated many extraordinarily complex financial cases, including cases with sham offshore trusts and corporate entities. Mr. Rottenstreich has litigated valuation issues across many different types of businesses and industries, including hedge funds and private equity interests, partnership interests, retail clothing chains, biotech companies and commercial and residential real estate holdings.

Mr. Rottenstreich has also litigated challenging and acrimonious custody cases when appropriate custody arrangements could not be agreed upon, including cases with underlying mental health or substance abuse issues of a parent.

Notwithstanding his extensive litigation experience, Mr. Rottenstreich makes every effort to resolve cases early on, many times before litigation has even commenced.

Mr. Rottenstreich has been voted a New York Family Law "Super Lawyer" by his peers each year since 2013. He is also a past member of the Board of Directors of the New York University Alumni Association. He was also a legal consultant to Showtime's award-winning series "The Affair" for seasons two and three.

Prior to law school, Mr. Rottenstreich worked as a senior audit associate at Coopers & Lybrand. After law school, Mr. Rottenstreich clerked for the Honorable William M. Hoeveler, in the Southern District of Florida.

Mr. Rottenstreich then became a litigation associate at Cravath, Swaine & Moore where he had primary responsibility for handling all aspects of cases, and litigating a wide scope of substantive areas of law. After leaving Cravath, Mr. Rottenstreich joined Kirkland & Ellis, where he became a litigation partner. At Kirkland, Mr. Rottenstreich primarily represented broker-dealers in government investigations and securities arbitrations, and also represented creditors in bankruptcy proceedings, and a private equity firm in a dispute.

Before joining Cohen Clair Lans Greifer Thorpe & Rottenstreich LLP, Mr. Rottenstreich was a founding partner of a successful boutique litigation firm that developed an outstanding reputation in and around New York City.

Mr. Rottenstreich graduated Baruch College summa cum laude with a BBA in accounting. He then became a CPA, earning an award for his "high scores" on the exam. Mr. Rottenstreich graduated New York University School of Law cum laude where he served as an editor of its Law Review. Mr. Rottenstreich has lectured on various matrimonial issues, including on "Dates of Valuation" as part of the New York State Bar Association Matrimonial Trial Institute III: Trial Techniques and Strategies Program. Mr. Rottenstreich lives in Manhattan, with his wife, daughter, newborn son and two dogs.

Law Offices of Thomas Sciacca, PLLC

Thomas Sciacca, Esq.

Bar Admissions

New York
New Jersey
Florida
United States Tax Court

Education

New York University School of Law, LL.M. (taxation) May 2010

Pace University School of Law, J.D. (*cum laude*) May 2003

Distinction: Julian Hyman Memorial Scholarship for Excellence in Trusts & Estates

Executive Productions Editor, Pace Law Review (note published)

University at Albany, State University of New York, B.A. August 1999

Relevant Experience

Former Associate Attorney with boutique midtown law firm focusing its practice on Trusts & Estates and Elder Law.

In private practice since 2007.

Adjunct Assistant Professor at New York University's School of Continuing and Professional Studies (SCPS).

Professional Associations

New York State Bar Association (NYSBA)

Member: Trusts & Estates Section
Elder Law Section

Lesbian, Gay, Bisexual, and Transgender Law Association of Greater New York (LeGaL)

Member: Judiciary Committee

Out Professionals

Pro bono activities

Volunteer attorney for monthly legal clinic for SAGE, providing free one-on-one legal counseling for LGBT senior citizens on a variety of issues. Member of SAGE'S National Leadership Council.

Awards

2013 Recipient of *Top Attorneys* - New York Metro Area's Outstanding Young Lawyers in Estate Planning and Probate Law.

2013 Recipient of *Super Lawyers* - Rising Stars, Excellence in Practice.

2015 Recipient of *American Society of Legal Advocates* - Top 40 Trust and Estate Lawyers under 40 in the state of New York

Seminars

Tom has participated in a variety of seminars dealing with issues including: (1) Wills, Trusts, and Estates, (2) Health Care Proxies and Living Wills, (3) sophisticated tax planning, (4) planning for parents with disabled minor and adult children, (5) planning for members of the LGBT community, (6) planning for incapacity using a Durable General Power of Attorney, (7) guardianships for disabled children and adults, and (8) various Elder Law topics, including Medicaid and sheltering one's assets against long-term care costs.

Tom is available to participate in seminars upon request.

PAUL S. FORSTER, ESQ.

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Mr. Forster is in the private practice of law. He is a former Commissioner of the New York City Tax Commission, and a former District Tax Attorney for the New York State Department of Taxation and Finance.

Mr. Forster is Chairman of the Decedent's Estates Section of the Brooklyn Bar Association and is on the editorial board of its monthly publication, the *Barrister*. Mr. Forster is the recipient of the Association's Distinguished Service Award (2008). He also is a member of the New York State Bar Association, where he is on the executive committee of the Trusts and Estates Section and vice-chair of its estate planning Committee, and a member of the New York County Lawyers Association, and the Richmond County Bar Association.

He is co-author with Honorable Bruce M. Balter, Justice of the Supreme Court of the State of New York, County of Kings, of the Estate Law Update column *State of Estates* in the Brooklyn Bar Association *Barrister*. He also has co-authored with Justice Balter columns in the *New York Law Journal* and *One on One*, a publication of the New York State Bar Association. He also recently coauthored an article on the new New York State estate tax regime for the New York State Bar Association Trusts and Estates Law Section Newsletter. He has been a contributing author to Matthew Bender's Rohan, New York Civil Practice, EPTL, and to Matthew Bender's Cox Arenson. Medina, New York Civil Practice, SCPA.

His lecturing experience includes Surrogate's Court practice and litigation, estate planning, taxation and administration of estates, for the New York State Bar Association, New York State Trial Lawyers, New York County Lawyers Association, Brooklyn Bar Association, Richmond County Bar Association, New York County Surrogate's Court Guardian's Course, New York Women's Bar Association, New York Law School, Military Legal Officer CLE Program, Richmond County Medical Society, Newsweek Magazine pre-retirement seminars, and Surrogate's Court personnel OCA advancement examination preparation/review course (privately run).

Mr. Forster's fields of practice are (1) Surrogate's Court (proceedings and litigation,) probate, will contests, letters of administration, kinship proceedings, discovery proceedings, settling and contesting fiduciary's accounts, preparation of wills and trusts, compromising decedent's causes of action, and liquidation and administration of estates; (2) Taxation (estate and individual), planning, returns, proceedings, audits and litigation; and (3) Guardianships (MHL Article 81) proceedings, litigation, and administration.

He graduated from the City College of New York, New York Law School, *cum laude*, and New York University School of Law (LLM Taxation).