

Annual Meeting 2017 – Law Firm Check-Up – “LPM Day”



Committee Chair

Marian C. Rice, Esq., has concentrated her practice on the representation of attorneys and risk management for lawyers for more than 35 years. Ms. Rice holds the AV® Peer Review Rating from Martindale- Hubbell, its highest rating for ethics and legal ability, has been designated a Super Lawyer annually since 2008 and was assigned a “superb” AVVO rating. In 2012, Long Island Business News named Ms. Rice as one of the 50 most influential women on Long Island. Marian is a Past President of the 5,000 member Nassau County Bar Association, the largest suburban bar association in the country, and is presently Chair of NCBA’s Judiciary Committee. In 2014, Ms. Rice was awarded the NCBA President’s Award for service to the Association and in 2015, she was honored by the St. John’s Law School Alumni Nassau Chapter. In addition to having authored a column for the American Bar Association Law Practice Management Magazine, Ms. Rice is the co-Chair of the New York State Bar Association Law Practice Management Committee and an alternate member of the NYSBA Nominating Committee.



Program Faculty

James R. Alperin worked with money managers on Wall Street for 20 years. He used his knowledge and experience to advise them, when and how to best manage their portfolios. During his time working for the large institutional funds James gained a very broad view of the financial markets, including trading Options, Equities, Foreign Securities, and Debt Instruments. James now uses his knowledge and experience to help Wealthy Individuals, small Businesses, and families with special needs children. James brings his, and the Firms, experience with Estate Planning, Educational Planning, and Tax efficient strategies to his clients on a daily basis. For the investment purposes of his clients, James will use his own knowledge and experience as well as the firm’s asset allocation strategies, drawing from several sophisticated resources such as Morgan Stanley’s Global Investment committee research.



Robert Anthony has been with CNA since June 2007. He is responsible for the day to day oversight and underwriting of the NYSBA’s Lawyers Professional Liability Program for CNA. He is also responsible for overseeing Lawyers Programs in Maine, New Hampshire, Vermont and Michigan. Prior to joining CNA Rob helped launch the professional liability programs unit with Arch Insurance where he was responsible for oversight of the California State Bar program. He has been in Lawyers Professional Liability for 13 years and has been continuously underwriting attorneys in New York since he began his career in professional liability.



Anastasia V. Boyko, Esq. is working for herself in health and fitness, through The Yoga Unicorn, a company she started in May. She is also also working with law firms on health and wellness and yoga initiatives. Previously, Anastasia was a Director of Attorney Recruiting and Development for the East Coast Axiom office, where she was responsible for the recruitment, professional development, career progression and employment experience of over 400 lawyers and legal experts. Anastasia has held legal business and marketing roles with Haynes and Boone, LLP and Practical Law Company, Thomson Reuters. Prior to those roles, she practiced in the corporate tax and wills and trusts sections of Akin Gump Strauss Hauer & Feld LLP and Katten Muchin Rosenman LLP, respectively. Anastasia is a graduate of the Yale Law School and received her B.S. from the University of Utah.



Elizabeth “Libby” Coreno, Esq. is routinely asked to bring her solution-oriented approach to a wide range of clients from individuals to regional businesses to Fortune 500 companies in the areas of commercial and real estate development matters, including some of the largest industrial and

commercial projects in the region. Practicing law since 2004, Libby brings to the table extensive experience with zoning, planning, and real property development; complex commercial and real estate transactions; land use and SEQRA actions; environmental law; municipal law; litigation and appeals. Libby also provides experienced counsel regarding zoning applications, municipal taxation, easements, adverse possession, subsurface rights, contract disputes, and homeowner and condominium association matters.



Donna Drumm, Esq. combined her business degree with her law degree to build a firm that focuses on solutions, thoroughness and efficiency. Her Americans with Disabilities advocacy began when she met a woman who suffered from PTSD who could not find anyone to represent her. She was sued for over one million dollars for the wrongdoings of her ex-husband. This very bright woman struggled with her PTSD while coping with the starts and stops of her case. After years of fighting an administrative commission and superior court, she won and her good name is restored. She went on to create a bill that became law which will protect other spouses in her state. Donna was trained by the top ADA educator and author, Dr. Karin Huffer who linked the power of the ADA to seeking accommodations for persons with disabilities to make the courtroom a level playing field.



Lisa K. Jaffee, Esq. is a Risk Control Consulting Director for CNA's Lawyers Professional Services - Lawyers Program. She is responsible for the design and content of lawyers' professional liability risk control services, products and publications. She also authors articles focusing on law firm risk control and professional responsibility issues. Prior to joining CNA, Lisa was in private law practice for nine years in New York City, specializing primarily in the defense of product, premises and commercial litigation matters. She joined CNA in 2007 as a Claims Consultant for large law firm professional liability claims. In this capacity, she was responsible for managing the investigation, litigation, disposition and settlement of complex lawyers' professional liability claims. She is a member of the American Bar Association, PLUS and the New York State Bar Association. In addition, she serves on the New York State Bar Association's Law Practice Management Committee. She received her law degree from Boston University School of Law and her undergraduate degree cum laude from Tufts University. She has also earned the Registered Professional Liability Underwriter (RPLU) insurance designation.



Deborah E. Kaminetzky, Esq. is the founding member of Kaminetzky & Associates, P.C. located in Cedarhurst, New York. Prior to starting the firm Ms. Kaminetzky was an associate at Weisman Law Group, P.C. where she primarily practiced matrimonial and family law. Deborah has also worked at the New York Department of Consumer Affairs where she was responsible for prosecuting unlicensed home improvement contractors and negotiating settlements for consumers. Ms. Kaminetzky is a member of the American Bar Association, New York State Bar Association, Nassau County Bar Association Great Neck Lawyers Association, Nassau County Women's Bar Association. Deborah is an experienced mediator, having completed a mediation certificate program in December of 2013, and an advanced mediation certificate program in December of 2015.



Michael S. Kraft, Esq. provides business, corporate and real estate services to a variety of commercial clients and individuals advising them on existing strategies, new initiatives and the legal challenges that they face. As the scope and breadth of privacy and security regulations increase, many of Attorney Kraft's clients rely on his oversight to draft, implement and monitor their compliance efforts. He has focused considerable attention on the Massachusetts Data Security Regulations that become effective on March 1, 2010 and affect nearly every company with employees or customers in Massachusetts. His clients also rely on his knowledge of the Gramm Leach

Bliley Act, Health Insurance Portability and Accountability Act, Fair Debt Collection Practices Act and Fair Credit Reporting Act. Michael received his undergraduate degree in 1981 from the University of Pennsylvania and his law degree in 1984 from Boston University School of Law.



John T. McCann, Esq. is a partner in the Labor & Employment Practice. He has served as a member of the Firm's Executive Committee and as the Chair of the Labor & Employment Department. John is a Delegate to the New York State Bar Association House of Delegates, a Fellow of the American Bar Foundation and of the New York Bar Foundation, and an Officer and Director of the Onondaga County Bar Association. He has served on the Local Rules Committee of the United States District Court, Northern District of New York. He received his undergraduate degree in 1976 from Cornell University in the field of Industrial Labor Relations. In 1982 he received his J.D. from the Cornell Law School. John has also received several recognition and honors from the New York Bar Foundation, American Bar Foundation, Super Lawyers, and Martindale-Hubbell.



Dennis McGee has over 25 years of experience counseling professionals, business owners, corporations and universities in the areas of estate, retirement income, life insurance, disability insurance and employee benefit planning. He started off his career in sales with Biddle & Company from 1990-1996. Currently, he is the Vice President of Wealth Management at USI Affinity in Philadelphia, PA and has been with USI Affinity since 1996. Dennis received his B.S. in Management/Marketing from Saint Joseph's University in 1982. Afterwards he attended The American College of Financial Services in PA where he obtained his Chartered Financial Consultant designation in 1996.



Brian McLaughlin has been with USI Affinity for 14 years, specializing in Insurance, Medical, Dental, Vision, Life, Disability, HSA, HRA, and Health Care Reform. He is currently the Vice President of the Benefit Solutions Group in Philadelphia, PA. Previously, he held a position as an Account Executive with Great-West, a financial services company in Colorado. Brian received his B.A. in Economics and Business from Lafayette College in 1997.



Mike Mooney is the Senior Vice President for USI Affinity. Mike is the Liability and Consumer sales leader for USI Affinity. Mike is also responsible for coordinating the program management for USI Affinity's endorsed insurance programs, including The New York State Bar Association, The New Jersey State Bar Association, DC Bar, Boston Bar, The State Bar of Texas, and The Association of Small Foundations. With more than 10 years of industry experience, Mike has worked extensively on many facets of insurance programs for professional service firms. Prior to joining USI Affinity, Mike spent over 8 years with Aon in a variety of management roles. Most notably, Mike was the Assistant Vice President and National Sales Manager for Aon Affinity's Healthcare Division, and also spent time as the National Sales Manager for the AICPA Accountant's Professional Liability Program. Mike currently sits on the Law Practice Management Services Committee of the DC Bar.



Eugene W. Policastri, Esq. is an attorney with a law practice that is primarily focused on general civil litigation involving commercial and construction disputes. He has practiced law for 25 years and currently resides in the Washington D.C. metropolitan area. In addition to litigation, Gene speaks frequently at CLE seminars and advises lawyers and law firms on best practices for business operations, business growth, and marketing, with a focus on authenticity and integrity to the profession. Gene provides seminars, private coaching, and group coaching with attorneys nationwide, helping them achieve maximum business growth with greater ease and efficiency so they can build a sustainable, profitable future.



Andrew E. Roth, Esq. is a partner of Danziger & Markhoff LLP with over 30 years of experience as an ERISA attorney. He is a frequent lecturer in the areas of pension, profit-sharing and employee benefits law. He has substantial experience in designing and implementing qualified plans for business owners that maximize deductible contributions on their behalf. His services include designing, drafting and obtaining IRS qualification for a broad range of defined contribution and defined benefit plans, as well as ensuring their continued compliance with applicable law. Mr. Roth attended University College of Arts and Science of New York University (BA 1975) and graduated magna cum laude from Brooklyn Law School (JD 1981). Mr. Roth also received an LLM in Taxation from New York University School of Law (1982).



Deborah A. Scalise, Esq. is a partner in the firm SCALISE & HAMILTON LLP in Scarsdale, New York which focuses its practice on the representation of professionals (primarily lawyers and judges) in professional responsibility and ethics matters and white-collar criminal matters. Since 2002, Ms. Scalise has appeared before the Character and Fitness Committees, New York State and Federal Grievance Committees, and the Judicial Conduct Commission. Prior to 2002, Ms. Scalise was Deputy AAG General in Charge of Public Advocacy for the Westchester Region for the NY Attorney General's Office and handled cases involving consumer frauds, civil rights and public integrity matters. In 2016, Ms. Scalise was appointed to the NYS OCA CLE Board by Chief Judge Janet DiFiore. Ms. Scalise is a frequent CLE lecturer for various establishments.



Nancy B. Schess, Esq. represents businesses, both locally and nationally, in diverse industries including banking/finance, hospitality, entertainment, building services, manufacturing, and transportation. She practices in all facets of labor and employment law, including equal employment compliance and litigation, wage and hour, FMLA and employee leaves, and plant closing compliance. Ms. Schess also practices occupational safety and health law. Working closely with clients, Ms. Schess develops and implements preventive personnel policies and strategies that foster litigation-free workplaces. Ms. Schess is the co-founder of Gotham City Networking, Inc., an organization based in New York City that offers networking opportunities across multiple industries. She has appeared on television and radio and as a frequent speaker for professional associations and other groups.



Carol Schiro Greenwald, Ph.D. both a strategist and coach, helps her clients to combine management and marketing techniques to increase profitability. She shows individuals and firms how to structure their client

service and legal practice around their best clients. Her approach is captured in her book, *Build Your Practice the Logical Way – Maximize Your Client Relationships* (First chair Press, American Bar Association, 2012) which provides a guide to growing a practice by fully implementing three strategies: Understand key clients in their own world in order to be a proactive resource for them, create client-focused communication and legal process protocols, and prospect for new clients similar to the best current clients. Carol also coaches and trains individual attorneys in the personal skills needed for excellence in client service, business development and leadership.



Vivian D. Wesson, Esq. began her career at MMC in November 2005, working principally to support the reinsurance intermediary division, Guy Carpenter. She obtained her Associates in Reinsurance while working at Guy Carpenter in 2008. In May 2011, Vivian assisted in securing the first U.S. issued patent for any MMC company. Subsequent to obtaining this patent, Vivian guided colleagues in securing nine additional patents, including one from the Japan Patent Office. She now chairs the MMC Patent Council, which advises colleagues in ways to protect the intellectual capital developed throughout Marsh & McLennan Companies. In 2013, the MMC Patent Council was awarded the honor of “Best IP Department: Overall Strategy and Growth” by the International Legal Alliance.