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BIRNBAUM ADVISORY
MULTIDISCIPLINARY WEALTH STRATEGIES



Bruce L. Birnbaum, J.D., LL.M., CLTC *Financial Adviser*

Bruce L. Birnbaum, J.D., LL.M., CLTC, the founder of BIRNBAUM ADVISORY, has extensive experience in the areas of insurance, taxation, business, estate and financial planning. He is also a Certified Long Term Care Professional.

Bruce received his Master of Laws Degree (LLM) in Taxation from New York University School of Law and earned his Law Degree (JD) from Benjamin N. Cardozo School of Law. Bruce, who no longer actively practices law, is a Member of The New York State Bar.

Bruce's Multidisciplinary Wealth Strategies approach is derived from his multidimensional background in the law and financial arenas which uniquely qualifies him to more effectively integrate the various components of your planning. Bruce's insight and advice can help enhance your ability to create, accumulate and preserve wealth for yourself and the people you care most about. By representing many different investment and insurance companies, Birnbaum Advisory offers a wide array of options and solutions to better assist you in fulfilling your goals.

Publications:

Bruce's articles have appeared in Taxation for Lawyers, The CPA Journal, The New York Law Journal, Taxation for Accountants, and other publications.

Lectures and Reference:

Bruce has lectured for The International Association for Financial Planning, The Society of Financial Service Professionals, The National Association of Insurance and Financial Advisors, The New York State Bar Association, the Nassau, Queens, Suffolk, Westchester and Bronx County Bar Associations, The New York State Society of Certified Public Accountants, Baruch College Zicklin School of Business, The Estate Planning Council of Nassau County, Inc, C.W. Post Tax Institute, New York Institute of Technology, St. John's University School of Law, among many other professional, charitable and community organizations. He has been quoted in professional journals and other media.

Memberships:

Bruce has served on the Executive Board of the New York State Bar Association, Elder Law Section and Chaired its Insurance Committee. His current and past memberships include:

- The National and New York State Associations of Insurance and Financial Advisors
- Financial Services Institute
- The Society of Financial Service Professionals
- The New York State Bar Association
- The New York City Bar Association
- The Nassau County Bar Association
- The National Academy of Elder Law Attorneys
- The Estate Planning Council of Nassau County, Inc.
- Various Community and Charitable Groups

Bruce has dedicated himself to understanding the complexities involved in the various aspects of planning and applying that knowledge for the benefit of his clients.

- Wealth Management
- Insurance Protection
- Financial Planning

- Estate Planning Strategies
- Retirement Planning
- Compensation Design

- Business Planning
- Business Succession Strategies

David J. DePinto, Esq., LL.M., CPA, MST, CELA

David J. DePinto practices in the areas of trusts, estate planning, asset protection, charitable entities, business and succession planning for closely held businesses, estate and gift taxation, income taxation, [elder law](#), guardianship, probate and administration of trusts and estates, estate litigation and also provides representation to Guardians, Trustees and other fiduciaries.

Mr. DePinto received his LLM [Master of](#) Laws degree from NYU Law School, his JD degree from Brooklyn Law School and his Master of Science degree in Taxation, with academic honors, from Long Island University CW Post and his BBA degree from Hofstra University. He is a NYS Certified Public Accountant (CPA) and a (CELA) Certified Elder Lawyer certified by the National Elder Law Foundation as accredited by the American BAR Association. He is the recipient of the Edith Blum Foundation Award for Excellence in Taxation and the professor's Award for Academic Achievement in Taxation. He was recently named to the 2013, 2014, 2015, and 2016 list of [Super Lawyers](#)®.

He was an adjunct professor in the Masters Program at Long Island University. He has spoken for the New York State BAR Association on complex trust and Estate Planning topics and regularly lectures before the Nassau and Suffolk BAR Association centers for continuing Legal Education, and their committees and sub committees. He is frequently asked to speak on trust topics for (NBI) the National Business Institute and other providers of legal education. He was technical editor for the publication "Fundamentals of Trust Accounting Income and Principal under the Revised NYS Laws" (ABA Publication 2013). Known in the community for his expertise on trusts and related matters, he acts as counsel to many large and small law firms, providing advice and guidance in his areas of concentration.

Fern J. Finkel, Esq. is an elder law attorney with her office in downtown Brooklyn. She has specialized in elder law and guardianship since 1998 and has been in private practice since 1990. Prior to establishing her private practice, Fern was a litigator specializing in medical malpractice and personal injury at the law firm of Damashek, Godosky and Gentile. In October, 2015, Ms. Finkel entered into a partnership with Julie Stoil Fernandez, forming Finkel & Fernandez LLP.

Fern graduated with honors with her Bachelor of Science in Economics from New York University College of Business and Public Administration in 1981. She received her Juris Doctor Degree from Boston University School of Law in 1984.

As part of her private practice, Fern spends a significant amount of time working pro bono on behalf of the indigent elderly of Brooklyn. She has spearheaded the Legal Education and Assistance Project, known as LEAP, at the Brooklyn Bar Association Volunteer Lawyers Project, which she is a Board Member of. The LEAP project is dedicated to training attorneys to perform outreach at community and senior centers throughout Brooklyn, with a focus on assisting seniors to have their health care proxies and advance directives in place, avoiding the painful process of Guardianship which might otherwise result.

Fern is the Chair of the Foundation Law Committee of the Brooklyn Bar Association, the Vice Chair of the Elder Law Committee of the Brooklyn Bar Association, a delegate to the New York State Bar Association Elder Law Section where she serves as Co-Chair of the Guardianship Committee, and a board member of Legal Services New York City where she also serves on the executive board. Fern served for years as a volunteer certified mediator with Safe Horizons for community disputes, PINS cases and custody matters, as well as with the United States District Court, Eastern District. Fern lectures for various bar associations on topics including the Role of the Guardian, Role of the Court Evaluator, Role of the Attorney for the Alleged Incapacitated Person, Advance Directives and Guardianship. Since 2004 she has served as a mentor attorney at the Elder Law Clinic at New York Law School. Fern is a co-founder of the Touro Center Aging and Longevity Institute Guardianship Quality Initiative, a co-facilitator of the Working Model of Guardianship- WINGS [Working Interdisciplinary Network of Guardianship Stakeholders] and serves on the Committees on Character and Fitness for the Second Judicial Department.

Fern has won numerous awards for her pro bono service, including the Brooklyn Bar Association Frieda S. Nisnewitz Award for Pro Bono Service (1996), an Award of Merit from the National Center for Missing and Exploited Children (1997), the New York State Bar Association Pro Bono Award for the Second Judicial District (2003), the Women's Bar Association of the State of New York Hanna S. Cohn Pro Bono Award (2004), the Brooklyn Bar Association Distinguished Service Award (2009) and (2013) and the Brooklyn Volunteer Lawyers Project Building Bridges Leadership Award (2013). Fern has been listed as a New York Super Lawyer in the field of elder law in 2014, 2015 and 2016.

Amy J. Guss is a partner of Satterlee Stephens LLP. Ms. Guss specializes in the areas of taxation and trusts and estates. She represents individuals in a wide range of matters, including income, gift, estate and generation-skipping transfer tax matters and the drafting of wills and trust agreements, including charitable split-interest trusts, qualified personal residence trusts, qualified annuity trusts and insurance trusts. She is experienced in business succession planning and retirement planning and the valuation issues associated with such planning. Ms. Guss provides counsel on domestic and international estate planning issues to U.S. citizens living abroad and nationals of other countries residing or owning property in the United States. She also represents corporate and individual fiduciaries in connection with the administration of estates and trusts. Admitted to practice in New York and New Jersey, Ms. Guss is a member of the Trusts and Estates Section of the New York State Bar Association and the Real Property, Probate and Trust Law Section of the American Bar Association. Ms. Guss earned her undergraduate degree (B.A.) from Barnard College, her law degree from the City University of New York Law School and her master of laws degree (LL.M.) in taxation from New York University.

AREAS OF PRACTICE

- Elder Law/Long Term Health Care and Medicaid Planning



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EDUCATION

- New York Law School, JD
- State University of New York at Albany, BA

➤ RICHARD A. MARCHESE ➤

AT A GLANCE

Richard A. Marchese, Esq., is Partner in the firm's Elder Law and Health Care Practice Group responsible for handling all elder law and health care issues. He concentrates his practice in Medicaid and Estate planning, Social Security, Medicare and Medicaid eligibility and recovery matters, asset protection, issues of spousal support, and the use of trusts in Medicaid planning.

Prior to joining the firm, Mr. Marchese served for over fifteen years as Chief Counsel to the Monroe County, N.Y. Department of Social Services, advising the Chronic Care, Home Care and Adult Protective units at that agency.

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

COMMUNITY INVOLVEMENT

Mr. Marchese is a member of the Board of Directors for the Rochester Chapter of the Cystic Fibrosis Foundation. He is past-President of Brighton, NY Rotary Club, and has participated for many years in the Monroe County Bar Association's Lawyers for Learning Program. He is also an attorney panel member of the Surrogate Decision-Making Committee of the New York State Commission on Quality Care.

BAR ADMISSIONS

Mr. Marchese is admitted to practice in the State of New York, and the United States District Court for the Western District of New York.

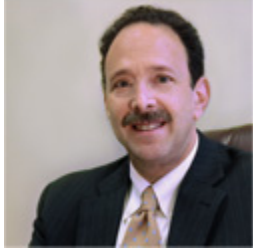
PROFESSIONAL AFFILIATIONS

Mr. Marchese is a member of the Monroe County and New York State Bar Associations. He is also a member of the Executive Committee of the Elder Law Section of the New York State Bar Association.

OTHER

Mr. Marchese is a frequent speaker to the Elder Law Sections of the New York State and Monroe County Bar Associations, as well as the Estate Planning Council of Rochester. He has authored publications on the following topics:

- Transfer Rebuttals and Medicaid Planning
- Use of supplemental needs trusts in Medicaid planning
- Medicaid liens and rights of subrogation
- Special case studies in complex Medicaid planning



Managing Attorney

David R. Okrent, Esq., CPA is the principal owner of the Law Offices of David R. Okrent. Having more than 26 years experience in both legal and accounting fields, he was recently nominated to be the Long Island District Delegate for the New York State Bar Association's Elder Law Committee. David has received many recognitions for his contributions to the practice of Elder Law, including most recently the Long Island Business Leadership in Law Award. This award is described by Long Island Business News as "Experience counts. Dedication, hard work, skill, tenacity and excellence are expected. Compassion is essential. The Leadership in Law Award recognizes all of these qualities and is dedicated to those individuals whose leadership, both in the legal profession and in the community, has had a positive impact on Long Island." David was also honored by Day Haven in October 2010 for his outstanding work in the senior community and his commitment to preserving the quality of life of the senior community. Prior to his practice in Elder Law, David was a Revenue Agent for the IRS. He was responsible for litigation support and audit examinations of individuals, corporations and partnerships. He brings his experience with the IRS to his Elder Law practice. David distinguishes himself from others in his field, not only with his extensive credentials, but with his outstanding dedication to his clients and his deep concern and intensive thinking that permeate his practice. Every client is treated with the highest respect and integrity.

Richard A Weinblatt

Attorney at Law

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

