

Biographies



James R. Barnes, Esq., is a shareholder of Burke & Casserly, P.C., and joined the firm as an attorney in 2005. He focuses his practice in elder law, trusts and estates, guardianship, special needs planning, business formation and succession planning, and real estate. James is admitted to practice law in New York State and is also a member of the Bar of the United States Supreme Court.

James is an active member of the New York State Bar Association, where he serves on the Executive Committee of the Elder Law and Special Needs Section. In addition, he is currently the Chair of the Association's Committee on Continuing Legal Education. James is a Past-Chair of the Association's Young Lawyers Section. He has also served on the Association's Executive Committee, House of Delegates, in addition to several special committees and task forces.

James presently serves on the board of directors for The New York Bar Foundation, a not-for-profit organization dedicated to aiding charitable and educational projects to meet the law-related needs of the public and legal profession. As part of his work with the Bar Foundation, he currently serves as Vice-Chair of the Fellows. His other bar association affiliations are as a member of NYSBA's Trusts & Estates Section, as well as a member of the Albany County Bar Association, where he served as a Co-Chair of its Young Lawyers Committee for several years. He is also a member of the Estate Planning Council of Eastern New York.

James' commitment to his practice is reflected in his involvement with many community organizations and events. James currently serves as a Trustee of the Foundation for Ellis Medicine in Schenectady, as well as a member of the board of directors of the Visiting Nurse Service of Northeastern New York. He is a Past-President of the Visiting Nurse Service of Northeastern New York's Foundation Board, which is now a part of the Foundation for Ellis Medicine. He conducts regular speaking engagements in various community and professional forums, lecturing about current topics affecting seniors and their families. James is also a frequent speaker at continuing legal education programs for attorneys and other professionals involved with estate planning and elder law.

James received his Juris Doctorate from Wake Forest University School of Law in 2004, where he studied as an A.J. Fletcher Law Scholar. While at Wake Forest, he became an active member of the Phi Alpha Delta National Law School Fraternity, serving for two years as the chapter's Vice-President. James pursued his undergraduate education at the State University of New York at Binghamton. In 2001, he received his Bachelor of Arts, *summa cum laude*, double majoring in Philosophy, Politics and Law, and in Music. At Binghamton, he became a member of the Phi Beta Kappa, Golden Key and Phi Eta Sigma National Honor Societies.

James lives with his wife and two children in Latham.

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VALERIE J. BOGART

BIOGRAPHY

Valerie Bogart has been Director of the Evelyn Frank Legal Resources Program (EFLRP) since June 2002. Originally founded by Selfhelp Community Services, Inc., the Evelyn Frank program moved to the New York Legal Assistance Group in April 2013, a non-profit legal services organization. Valerie continues to serve as EFLRP's Director. EFLRP advocates for access to long-term care and other health care for low-income seniors and people with disabilities through direct legal representation, policy advocacy, legal education, and its website <http://NYHealthAccess.org>. Earlier, Valerie was an attorney for the Legal Aid Society Brooklyn Office for the Aging, Legal Services for the Elderly in Manhattan, and the Legal Aid Society in Minneapolis, where she was a Reginald Heber Smith Fellow. A graduate of the New York University School of Law, she lectures extensively for bar and social services organizations, has taught adjunct courses at CUNY and Fordham law schools, and has received numerous awards.

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MICHAEL A. BURGER

Michael Burger is a founding partner of Santiago Burger LLP, a litigation-based law firm in Rochester, NY, and he is a founding member of Neutral Mediation Group LLC. Prior to that, Mr. Burger was a partner in two Rochester, New York law firms. Before relocating to Rochester, New York, in 1999, Mr. Burger spent several years practicing law in a large non-profit New York City based public interest law firm where he handled a variety of constitutional law matters including impact litigation that successfully secured the right to a jury trial for housing court litigants city-wide.

Mike focuses his litigation practice on fiduciary relationships within New York State and Federal Trial and Appellate Courts. His representative clients run the range from businesses of various sizes and structures, trusts, estates, and individuals owed or under a fiduciary duty such as officers, directors, executors, trustees, agents under a power of attorney, and guardians. Mike also handles Election Law cases during the season for both petitioners and respondents. These practices are equally divided between representing plaintiffs and defendants, affording an alacrity with the issues and arguments attending all facets of litigated matters. The substantive areas he focuses on consists of complex commercial disputes, corporate, LLC, and partnership dissolutions and disagreements, challenges to agency authority, congested article 81 guardianship, labor and employment matters (including class and collective action experience as lead counsel), election law, campaign finance, ballot access proceedings, and civil rights impact litigation challenging laws that work a constitutional deprivation on a segment of the citizenry. Michael commonly employs mediation as a tool across disciplines as an alternative to litigation.

Mr. Burger is also a founding member of the Neutral Mediation Group, LLC which provides mediation services to parties and industries needing to mediate disputes both pre-suit and during litigation. Michael brings over 20 years of experience as a litigator to the process, as coursework, lecturing, and writing in the field of mediation dating back to law school coursework. Mr. Burger is a member of the New York State Bar Association Dispute Resolution Section and serves on the Monroe County Bar Association's Fee Arbitration Committee where he acts alternatively as mediator or arbitrator. A passionate proponent for the mediation process, Mr. Burger stresses the importance of the parties being heard and empowered to chart their own resolutions.

Mr. Burger has written and lectured before the state and local bar associations on a variety of topics within his practice concentrations, including mediation and mediation clauses. His ready rapport and ability to build bridges of trust make him a consummate friend of the honest deal.



Veronica Escobar
Principal and Founder
The Law Offices of Veronica Escobar

Veronica Escobar has been practicing law in her home state for fourteen years. For the past eight years, she has been the Principal and Founder of The Law Offices of Veronica Escobar, a practice focusing in the areas of Elder Law, Special Needs Planning, and Trusts and Estates. She has two offices, one in her home borough of Queens and the other on the island of Manhattan.

Veronica is admitted to practice in the state of New York. She is also admitted to practice before the U.S. District Courts for the Eastern and Southern Districts of New York. She graduated summa cum laude from Fordham College at Rose Hill, Fordham University, where she was also elected to Phi Beta Kappa, with a degree in American Studies and a minor in Latin American/Latino Studies. Veronica also received her law degree from Fordham, where she was a Notes and Articles Editor of the *Fordham International Law Journal*. She is a member of NYSBA, and Chair of this section's Diversity Committee.

She is also the Chair for both the Solo and Small Firm Affinity Group and the Alumni Attorneys of Color (AAC) Solo and Small Firm Committee at her alma mater, Fordham Law.

On a personal note, she is happy to be at this year's Summer Meeting and to be presenting on a topic that is near and dear to her.

She can be reached at vescobar@veronicaescobarlaw.com

Linda Grear, Esq., Associate



Linda brings over two decades of experience in elder law, estate planning, trusts, guardianship law and probate estates.

Her deep experience in elder law has built her expertise, as well as her understanding of the importance of compassion in dealing with clients who are enduring emotionally difficult times.

A frequent speaker on issues related to elder law and estate planning, she has been honored in Buffalo Spree Magazine and in Who's Who in Law in Business

First of Buffalo.

Grear is a graduate of the University of Akron School of Law (1994) and holds a B.S in Criminal Justice from the State College of New York at Buffalo (1991). She is a resident of Pendleton.



Joseph A. Greenman
Of Counsel
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Practice
Trust and Estate

Education
Syracuse University College
of Law (*cum laude*, 1974)
Colby College (B.A., 1971)

Bar/Court Admissions
New York
U.S. Supreme Court
U.S. Court of Appeals for the
Second Circuit
U.S. District Court for the
Northern District of New York
U.S. District Court for the
Western District of New York

Joseph A. Greenman

Joseph counsels individual clients and business owners in estate and financial planning, estate administration, asset preservation and elder law matters. He has lectured extensively on probate and administration of estates, elder law and estate planning.

Honors and Affiliations

- Listed in:
 - *The Best Lawyers in America*® 2016, Litigation - Trusts and Estates; Trusts and Estates
 - *Martindale-Hubbell*®, AV Preeminent Rated
 - *New York Super Lawyers 2015*®, Estate & Probate
- New York State Bar Association, Elder Law Section, Committee on Estates, Trusts and Medicaid; Co-Vice Chairman, Special Needs Subcommittee Elder Law Section; Trust and Estate Section; Past Chair, Estates & Surrogate's Court Committee
 - 2014 Co-Chair, Elder Law and Special Needs Section Summer Meeting, 8/7-9/14

Other Activities

- President & Director, Jewish Home of CNY, Inc.
- Village Justice, Village of Manlius
- Director, Menorah Park Foundation
- Advisory Board, FM A Better Chance
- Past Director, CNY Estate Planning Council



Devika Kewalramani

Partner

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Devika Kewalramani is a partner and co-chair of Moses & Singer's Legal Ethics & Law Firm Practice which advises law firms, lawyers and legal departments on ethical and legal aspects of law practice. She also currently serves as the firm's general counsel. Devika represents law firms and attorneys in legal ethics, professional discipline, law firm risk management, lawyer licensing and admissions matters, including escrow issues, conflicts of interest, structuring arrangements with non-lawyers, multijurisdictional practice, disqualification, lateral transition, law firm mergers and break-ups, partner disputes, ethics in alternate dispute resolution, reporting/disclosure issues, attorney advertising, law firm cyber security issues, social media use, legal fee disputes, and other professional responsibility issues. She conducts ethics and risk management audits for clients.

A frequent lecturer, panelist and author on legal ethics, Devika speaks to law firms, corporate legal departments, bar associations and professional groups on a variety of legal ethics matters. The editor of *New York State Bar Association's Journal* magazine recognized Devika as author of one of the best articles of 2010: "Up Close and Professional With New York's Engagement Letter Rules" (September 2010). Her articles, "Trading Client Trust: A Glimpse Into Insider Trading Within the Legal Profession" and "Demystifying ESQrow Ethics" were featured on the front page of the *New York State Bar Association Journal's* May 2018 and May 2013 editions. Devika is a faculty member of the *Practising Law Institute* and of *Lawline.com*.

Devika is co-chair of the Council on the Profession of the New York City Bar Association.

She is the immediate past Chair of the Committee on Professional Discipline of the New York City Bar Association.

She was appointed a member of the New York Commission on Statewide Attorney Discipline in 2015 and served as a co-chair of its Subcommittee on Transparency and Access.

In 2014, 2015, 2016 and 2017, Devika achieved Super Lawyer status in the Metro Edition of *New York Super Lawyers®*.

PROFESSIONAL AFFILIATIONS

- Co-Chair, Council on the Profession, New York City Bar Association
- Past Chair, Committee on Professional Discipline, New York City Bar Association (2013-2017)
- Co-Chair, Subcommittee on Legal Ethics, Corporate Counsel Committee, American Bar Association Section of Litigation
- Member, New York Commission on Statewide Attorney Discipline, Co-Chair, Subcommittee on Transparency and Access (2015)
- Member, Committee on Continuing Legal Education, New York State Bar Association
- Member, Advisory Board of the Ethics Institute, New York County Lawyer's Association
- Member, Editorial Board of *The Practical Lawyer*, published by ALI CLE
- Member, Foundation Board of The City University of New York School of Law
- Member, International Board of Advisors, Jindal Global Law School, Sonapat, Haryana, India
- Past Chair, Subcommittee on Engagement Letters, Professional Responsibility Committee, New York City Bar Association
- Past Member, Committee on Professional Ethics, New York State Bar Association

PUBLICATIONS

- *Lexis® Practice Advisor for Corporate Counsel: Ethics For In-House Counsel*, Author (2012-current).
- "The New York Rules of Professional Conduct," Oxford University Press/New York County Lawyers' Association, Rules Co-Editor and Contributor of Three Chapters: "Rule 1.7 – Conflicts of Interest: Current Clients;" "Rule 1.8 – Current Clients: Specific Conflicts of Interest Rules;" and "Rule 1.9 – Duties to Former Clients" (2010-2012).

PRACTICE AREAS

- Privacy
- Legal Ethics & Law Firm Practice

EDUCATION

- City University of New York School of Law (J.D.)
- St. Xavier's College (B.A.) Kolkata, India

BAR/COURT ADMISSIONS

- U.S. District Court, Southern District of New York
- New York
- Connecticut

FOREIGN LANGUAGES

- Bengali
- Hindi

KATHLEEN D. KRAUZA, ESQ., has served as a New York State Chief Clerk IV in Erie County Surrogate's Court from August, 2016 to present. She previously held the positions of Chief Clerk of Supreme and County Court and Commissioner of Jurors in Chautauqua County, and Deputy Chief Clerk of Chautauqua County Surrogate's Court. Ms. Krauza has assisted with various state wide court initiatives including the implementation of New York State's first summary jury trial program. Ms. Krauza graduated from St. Michael's College in 1981 and was a 1985 graduate of The University of Dayton School of Law. She is a member of the New York State Surrogate Courts Association of Chief Clerks and the Erie County Bar Association. She was the recipient of the N.Y.S. Unified Court System's first Quality Service Leadership Award for her professionalism and dedication to promoting quality service in the courts. Prior to her career in the Unified Court System, she was engaged in the private practice of law in Fredonia, New York.

Richard A. Marchese is a partner at Woods Oviatt Gilman LLP in Rochester, NY in the firm's Elder Law and Health Care Practice Group. He is 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. Mr. Marchese also provides counsel to health care providers in matters of compliance with federal and state regulations, defense of government audits and investigations, voluntary self-disclosures, corporate compliance and professional licensure issues.

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 was the director of the Monroe County Provider Fund, Waste and Abuse Demonstration Project, and he now represents Medicaid providers in matters of compliance.

Robert Mascali is an attorney with over forty years' experience in the nonprofit, government and private sectors. He is currently a senior consultant with the Center for Special Needs Trust Administration, Inc. which is a national nonprofit organization that administers special needs trusts throughout the United States. In addition, Mr. Mascali is admitted to practice before the courts in the Commonwealth of Massachusetts and the State of New York and is currently "of counsel" with Bourget Law Group in Falmouth, Massachusetts and with Pierro, Connor and Associates, LLP in Latham, New York. He concentrates in the areas of Special Needs Planning for persons with disabilities and their families and care givers, Long-Term Care Planning, and Elder Law and Estate Planning. He previously served as the Associate General Counsel at NYSARC, INC. and served as Counsel to NYSARC Trust Services, one of the largest pooled trust organizations in the United States. Prior to that position, Mr. Mascali served as Deputy Counsel and Managing Attorney for the New York State Office of Mental Retardation and Developmental Disabilities (now the Office for People with Developmental Disabilities). Mr. Mascali is a member of the New York State Bar Association and the Elder Law and Special Needs Section and the Trusts and Estates Section. He serves on the Executive Committee and is the Section's liaison to the National Academy of Elder Law Attorneys (NAELA). He is also a member of Massachusetts NAELA and is the Past President of the New York Chapter of NAELA. Mr. Mascali is a member of the Academy of Special Needs Planners and is a frequent presenter and author on topics dealing with elder and special needs law and planning. Mr. Mascali is a member of the Town of Falmouth Commission on Disabilities and is president elect of the Rotary Club of Falmouth as well as a member of the Board of Directors of the National Association for the Blind at Albany Foundation.

Kerry McGrath is a senior attorney at the Cuddy Law Firm. Her practice is focused on special education advocacy and litigation. Kerry is a graduate of Syracuse University (B.A., *magna cum laude*, Maxwell School of Public Citizenship), City College of New York (M.S., Ed.) and New York Law School (J.D.).

Prior to beginning a career in special education law, Kerry was a New York City public school teacher. She taught English as a Second Language (ESL) at Intermediate School 52. As an NYLS law student, she was a member of the Justice Action Center, participated in the civil rights clinic and participated in the New York Law School Street Law Program.

Sara Meyers, Esq.
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Ms. Meyers is a Member of the firm of Enea, Scanlan & Sirignano, LLP, and concentrates her practice on Elder Law, Estate Planning, Special Needs Planning, Guardianships, and long term care planning strategies, with a focus on Medicaid home care and nursing home. She has been named to the 2013, 2014, 2015, 2016 & 2017 New York Metro Super Lawyers list in Elder Law.

Prior to Enea, Scanlan & Sirignano, Ms. Meyers was a staff attorney at the Sadin Institute on Law of the Brookdale Center for Healthy Aging and Longevity and the New York Legal Assistance Group. At Sadin, Sara concentrated on Medicaid, home care, and the Medicare Part D prescription drug program. She created materials and conducted training seminars for social service providers, attorneys, and social workers on topics including Elder Law, Medicaid, Medicare, home care, and Administrative Appeals.

Ms. Meyers has authored “Using SCPA Article 17-A and MHL Article 81 Guardianships for Disabled Children,” New York State Bar Association, Senior Lawyer Section, The Senior Lawyer, Spring 2015; “Medicaid Managed Long Term Care is Coming to Westchester. Are You and Your Clients Ready?,” Westchester County Bar Newsletter, January 2013; “Guardianships and Supplemental Needs Trusts (SNT) as planning tools for Parents of Adult Disabled Children,” New York State Bar Association Elder Law and Special Needs Journal, Winter 2012; “An Overview of Medicaid Home Care Options for Seniors,” New York State Bar Association Elder Law Attorney, Winter 2010; “Utilizing Medicaid Home Care as a Solution in a Post-DRA World,” New York State Bar Association Elder Law Attorney, Summer 2007 and Westchester County Bar Newsletter, June 2007. Ms. Meyers coauthored with Anthony J. Enea “The Doors Open Further for the Nursing Home without Walls Program,” Westchester County Bar Newsletter, November 2007.

Ms. Meyers is a frequent lecturer for Elder Law Programs sponsored by the New York State and Westchester County Bar Associations. She is a member of the New York State Bar Association, the Elder Law and Special Needs Section (Executive Committee, vice-chair Guardianship Committee and 9th District Delegate; Editor, Elder Law and Special Needs Journal) and Trust and Estates Section, and a member of the Westchester County Bar Association (Co-Chair Guardianship Committee, past Co-Chair of the Elder Law Committee) and is an editor of the Westchester County Bar Journal. She is also Co-Chair of Westchester County Senior Law Day.

Ms. Meyers has a B.A. in History, cum laude, from Brandeis University and a J.D. from the Cardozo School of Law. She is also a volunteer attorney for Legal Services of the Hudson Valley. She is a Trustee of the Board of Directors of the Westchester Day School in Mamaroneck, New York.

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.

Tara is the Vice-Chair of the Elder Law and Special Needs Section of the New York State Bar Association. Tara is the co-editor in chief 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 is also an active member of the Trusts and Estates Law Section, where she serves as District Delegate for the Fourth Judicial District. 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. She is also a Member of the Academy of Special Needs Planners and the National Academy of Elder Law Attorneys.

In March of 2016, Tara was elected as a Fellow of the American College of Trust and Estate Counsel (ACTEC). ACTEC Fellows are selected on the basis of experience, professional reputation and ability in the fields of trusts and estates and on the basis of having made substantial contributions to these fields through lecturing, writing, teaching and bar activities.

Tara is a Past President of the Board of Directors of the Estate Planning Council of Eastern New York. 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. She is a Member of the Board of Directors of the Wesley Community, a continuing care community for seniors in Saratoga Springs, New York as well serves on the Board of the Wesley Foundation. Tara also chairs the Planned Giving Committee of the Wildwood Foundation, an organization that supports Wildwood Programs, a school for individuals with disabilities in Albany, New York.

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.

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JOAN LENSKY ROBERT is a member of KASSOFF, ROBERT & LERNER LLP, a law firm in Rockville Centre, New York practicing exclusively in the areas of elder law, special needs planning and disability law. Ms. Robert is a graduate of Skidmore College, where she was a member of Periclean, the University of Pennsylvania, where she studied pursuant to a Ford Foundation Fellowship, and Touro College School of Law, summa cum laude, where she was valedictorian of the part time division. Prior to entering the practice of law, Ms. Robert taught French with the Valley Stream Central High School District.

Ms. Robert served as Chair of the New York State Bar Association Elder Law & Special Needs Section from 2003-2004 and serves as Co-Chair of its Special Needs Planning Committee. She founded and served as Chair of its Mentorship Committee. She received a Lifetime Achievement Award from the New York State Elder Law and Special Needs Section in January, 2014. She is a Fellow of the New York State Bar Association. She co-wrote the chapter on Special Needs Planning in the book Guardianship Practice in New York State and wrote the chapters on Medicaid liens and planning in Personal Injury Actions in New York published by the New York State Bar Association. She is an attorney member of the Guardianship Advisory Committee formed by the Office of Court Administration.

Ms. Robert has been named a Super Lawyer since 2013 and was chosen as a Top Lawyer in North America. Ms. Robert has been Board Certified as a Certified Elder Law Attorney (CELA) by the National Elder Law Foundation, as accredited by the ABA. In March, 2016, she was honored as one of the 50 Outstanding Women in the Law on Long Island.

Ms. Robert served as a member of the Board of Directors of the Nassau County Bar Association for 6 years, and is a past chair of its Elder Law/Social Services/Health Advocacy Committee. Ms. Robert served as Dean of the Nassau Academy of Law, and now is co-chair of the Senior Lawyers committee.

Ms. Robert is a member of the Board of Directors of NAELA. She is a member of the steering committee for the 2018 Annual Meeting and Summit. She received the NAELA award as outstanding member of the New York Chapter in 2012 and also received the Theresa Foundation Award for outstanding service and advocacy to persons with special needs. She is a member of the Council of Advanced Practitioners.

Ms. Robert has been honored for outstanding service by the Long Island Alzheimer's Foundation, Project Real, the New York State Trial Lawyers Association, and the National Multiple Sclerosis Society.. She served on the Board of Editors of the Bill of Particulars, the publication of the New York State

Trial Lawyers Association. She is a past Editor in Chief of the New York Elder Law and Guardianship Newsletter.

Joan and Charles Robert are the proud parents of Heather Robert Coffman, who practices employment law in San Francisco, and of Jay Robert, an attorney with Kassoff, Robert & Lerner. They are the dotting grandparents of Naomi and Leo Coffman and Edie and Ike Robert.



VINCENT J. RUSSO, J.D., LL.M., CELA, CAP, is the Managing Shareholder of Russo Law Group, P.C., Long Island's Signature Elder Law, Special Needs and Estate Planning Law Firm with offices on Long Island and New York City.

He has championed the rights of seniors and people with special needs since 1985.

Vincent is a Founding Member, Fellow and Fifth President of the National Academy of Elder Law Attorneys (NAELA) and is a Founding Member and First President of the New York Chapter of NAELA. Additionally, he is the only NAELA member to receive the prestigious President's Award twice and is also a member of the invitation only, NAELA Council of Advanced Practitioners (CAP).

He is a Trustee and was the Founding Chair of the NAELA Foundation. Vincent is a certified elder law attorney by the National Elder Law Foundation. He is a Founding Member and Past Chair of the Elder Law Section and Co-Chair of the Special Needs Section of the New York State Bar Association (NYSBA).

Vincent is a Co-Founder of the Academy of Special Needs Planners and Past Board Member and President of the Guardianship Corporation of Cerebral Palsy of Nassau County. He is also Co-Founder and Chairman of the Board of ElderCounsel, LLC.

Vincent is a Co-Founder of the Theresa Alessandra Russo Foundation and the Theresa Academy of Performing Arts for Children with Special Needs, which were established in memory of his daughter, Theresa. He also created and co-hosts Family Comes First, a television on cable TV, which has won Three Telly Awards.

He is admitted to the New York, Massachusetts and Florida State bars and is the co-author of *New York Elder Law and Special Needs Practice* (Thomson Reuters).

Mr. Russo is a nationally recognized speaker and noted authority on Elder Law, Special Needs and Estate Planning. His distinction in Elder Law, Special Needs and Estate Planning has made him one of the most prominent attorneys in his field.



JOSEPH A. SHIFFLETT, ESQ.

Joseph A. Shifflett is Chief Court Attorney of Erie County Surrogate's Court. Prior to assuming that position in November 2004, he had been Surrogate Judge Barbara Howe's Principal Law Clerk in Surrogate's Court and previously from 1993 when Judge Howe was a New York State Supreme Court Justice. Shifflett served, before that, as Principal Law Clerk for two Erie County Court Judges. Prior to joining the court system, Shifflett was an attorney at the Buffalo Legal Aid Bureau.

A graduate of the University of Toronto and the State University of New York at Buffalo Law School, Shifflett is a member of the Bar Association of Erie County, and a past chair of the Criminal Law Committee of the BAEC. He was a long time member of the Erie County Bar Association's Aid to Indigent Prisoners Society, Inc. board of directors. Shifflett also served on an OCA committee set up to implement e-filing in Surrogate's Courts in New York State.



Richard L. Weber

Member

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Profile

Rick resolves toxic situations, whether they be interpersonal or environmental. Trust and estate conflicts, rocky transitions in family businesses, injuries from exposure to toxic chemicals, breaches of contractual relationships, creditor's rights and construction law are all interpersonal situations that Rick guides clients through on a regular basis.

As a co-chair of the firm's toxic tort and environmental litigation practice, Rick represents clients facing potential liability for discharges or releases of toxic substances, such as discharges of petroleum products and exposure to industrial chemicals, and for the failure to abate or remediate such substances. By guiding his clients expediently through their options to determine how they can resolve an issue before trial, Rick reduces stress and facilitates timely resolution reduces costs.

A trial attorney, Rick regularly addresses toxic relationships in areas such as commercial disputes, will contests, estate accountings, libel law and premises liability (including defense of lead paint exposure and Labor Law § 240 "Scaffold Law" claims.) Rick has extensive experience in securing pre- and post-judgment remedies for clients, including temporary restraining orders, specific enforcement of contract remedies (including non-compete and non-solicitation clauses) and disclosure of judgment debtor assets.

Representative Matters

- represented residential landlords in multiple lead-paint exposure cases, including securing dismissal of claims by motion for summary judgment
- secured a temporary restraining order and other relief related to the dissolution of a business partnership
- secured a guardian for an incapacitated elderly woman pursuant to Article 81 of the Mental Hygiene Law
- represented office supply wholesaler in action against software developer for defective software development and installation
- settled multiple actions related to trust and estate accountings
- defended a manufacturer of commercial kitchen equipment in a product liability lawsuit

Education

- College of William and Mary School of Law (J.D., 1999)
- State University of New York at Buffalo (B.A., *magna cum laude*, 1994)

Bar/Court Admissions

- New York
- U.S. District Court for the Eastern District of New York
- U.S. District Court for the Northern District of New York
- U.S. District Court for the Southern District of New York
- U.S. District Court for the Western District of New York

Practices

- Higher Education
- Toxic Tort and Environmental Litigation
- Litigation
- Environmental and Energy
- Business Restructuring, Creditors' Rights and Bankruptcy

- foreclosed on a commercial shopping center, with appointment of a receiver to manage the property during pendency of the action
- enforced a restrictive covenant with preliminary injunction, to bar competition by a disloyal former employee
- defended a scaffold law claim related to the collapse of an incomplete building addition

Honors & Affiliations

- Listed in:
 - *New York Super Lawyers 2017*®, Environmental Litigation
- New York State Bar Association, Torts, Insurance and Compensation Law Section, Chair, Toxic Tort Committee
- Onondaga County Bar Association
- Onondaga County Bar Foundation, Past President
- Mediator, ADR Mandatory Mediation Program, Northern District of New York
- Articles Editor, 1998-1999, *William and Mary Law Review*

Representative Presentations

- Going Beyond Lead: Lessons Learned from Lead Litigation and Trending Substances, HB Litigation Conferences, 2015 National Lead Litigation Conference 2015, November 6, 2015
- Libel: Say it Safely, New York Press Association Convention, 2012, 2013
- Advanced Insurance Coverage: Exclusions in Personal Lines Insurance, New York State Bar Association Continuing Legal Education Program, 2012
- Estate Litigation, New York State Bar Association Continuing Legal Education Program, 2011
- Basic Tort and Insurance Law Practice: Automobile Insurance Sources of Coverage, New York State Bar Association Continuing Legal Education Program, 2008, 2010
- Defamation, Disparagement and Language: Avoiding Libel Issues, New York Press Association Convention, 2010
- Collections and the Enforcement of Money Judgments: The Negotiated Settlement, New York State Bar Association Continuing Legal Education Program, 2005, 2007

Representative Publications

- Richard L. Weber and Thomas R. Smith, "Regulatory Corner," *NYS Chemistry Council Newsletter*, March 2017
- "No Greater Rights: The Limits of Pro Se Litigation in New York Courts," *NYSBA Journal*, July/August 2007, at 10
- "Stipulators Beware: The Perils of CPLR 2104," *NYSBA Perspective*, Fall/Winter 2006, at 14
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- "Playground Personal Injury Law - A Primer," *NYSBA Perspective*, Spring/Summer 2004, at 12
- "Riding on a Diamond in the Sky: The DBS Set Aside Provisions of the 1992 Cable Act," 40 *Wm & Mary L. Rev.* 1795, 1999

Other Activities

- Former member, Board of Directors, Skaneateles Ski Hill, 2012-2016



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.

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Pauline Yeung-Ha is a Partner in the law firm of Grimaldi & Yeung LLP.

Ms. Yeung-Ha concentrates in the practice areas of Trusts, Wills and Estates, Elder Law as well as Special Needs Planning. She received her undergraduate degree from Vassar College and her law degree from St. John's University School of Law. She is admitted to practice in both New York and New Jersey.

In addition to her practice, Ms. Yeung-Ha holds the following professional positions:

- Vice-Chair of the Diversity Committee of the Elder Law Section of the New York State Bar Association (NYSBA)
- Vice-Chair of the Membership Committee of the Elder Law Section of NYSBA
- Member of the Estate Planning Committee of the Trusts & Estates Law Section of NYSBA
- Co-Chair of the Pro Bono Clinic of the Asian American Bar Association of New York (AABANY) – named Committee of the Year for 2016 and Program of the Year for 2017
- Trustee on the Board of Directors of the Brooklyn Bar Association
- Secretary on the Board of Directors of CaringKind (formerly Alzheimer's Association, NYC Chapter)
- Member of the Board of Directors of the New York Chapter, National Academy of Elder Law Attorneys (NAELA)

Recognitions:

- *Honoree, St. John's University School of Law Chapter of the Asian-Pacific American Law Student's Association (APALSA), 2018*
- *"Super Lawyer" 2015 to 2018*
- *"Best Lawyer" 2012 to 2018*
- *Brooklyn's Women of Distinction, 2017*
- *Honoree, General Human Outreach in the Community, Inc., 2017*
- *Honoree, Chinese-American Planning Council, Inc., Brooklyn Branch for service and dedication to the Brooklyn Chinese community, 2015*
- *New York's Women Leaders in the Law, 2012*
- *Super Lawyer's "Rising Star" 2011 to 2014*
- *NAPABA's "Best Lawyer Under 40", 2011*
- *Citation awarded by former Assemblywoman (now Congresswoman) Grace Meng, 2010*

Ms. Yeung-Ha is active in serving the community as well. Aside from conducting presentations in English, she also gives seminars in Cantonese and Mandarin Chinese. Ms. Yeung-Ha was key speaker for Assemblywoman Grace Meng's Senior Law & Financial Planning Workshop.