

## **SPEAKER BIOGRAPHIES**



# **NANCY BURNER, ESQ., CELA BIOGRAPHY**

Nancy Burner, Esq. is the founder of Burner Law Group, P.C. established in 1995.

Nancy holds the designation of a Certified Elder Law Attorney (CELA), awarded by the National Elder Law Foundation as accredited by the American Bar Association. She is a member of the Elder Law and Trust and Estates sections of the New York State Bar Association, the Suffolk County Bar Association and the Real Property, Trust and Probate Committee of the American Bar Association. Nancy is a past president of the Suffolk County Women's Bar Association and a past co-chair of the Suffolk County Elder Law Committee.

Nancy is a former five term trustee for the Lawyers' Fund for Client Protection, a state administered agency which was created in 1981 to protect law clients from the misuse of their money by dishonest attorneys and to promote public confidence in the administration of justice in New York State.

For ten consecutive years, Nancy has been named as a Super Lawyer in the field of Elder Law. Super Lawyers, part of Thomson Reuters, is a rating service of outstanding lawyers from more than 70 practice areas who have attained a high degree of peer recognition and professional achievement. The annual selections are made using a patented multiphase process that includes a statewide survey of lawyers, an independent research evaluation of candidates and peer reviews by practice area. As a Super Lawyer, Nancy has also received this award in the Top Women Attorney category as well.

Nancy frequently lectures on the legislative changes, financial implications, and governmental benefits affecting the elderly and special needs population. In 2016, Nancy was named as an "Outstanding Woman in Law" by Hofstra University School of Law Center for Children Families and the Law. Later that same year, she was named by Manhattan Magazine as a Big Apple Entrepreneur winner.

Nancy earned her Bachelor of Arts in 1985 from Stony Brook University where she graduated Magna Cum Laude. She graduated in the top 2% of her class, with distinction, from Hofstra University School of Law in 1988. In 2011, Nancy returned to her alma mater as an Adjunct Professor, where she created their first law school course in Elder Law. Nancy continues to grow her practice with offices in New York City, Setauket, and Westhampton Beach. She is admitted to practice law in the State of New York.



# Hyman G. Darling, Shareholder

## Bacon \ Wilson PC

### Areas of Practice:

Estate planning and elder law, alternative dispute resolution

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### Education:

Western New England College, J.D., 1977  
Boston University, A.B., 1972

### Bar & Court Admissions:

Commonwealth of Massachusetts  
U.S. District Court, District of Massachusetts

### Professional & Community Activities Include:

Vice President: National Academy of Elder Law Attorneys  
Instructor: Bay Path College: Estate Planning, Estate Administration, and Probate  
Lecturer: Unraveling the Mysteries of Medicare & Medicaid, Western New England University, June 2015  
Lecturer: Estate Planning for Divorced and Blended Families, Monson Savings Bank, October 2014  
Reader: Mass Mutual Children Center Kindergarten/Pre K class, 2004 - Present  
Adjunct Professor: Western New England University School of Law, LLM Program  
Student Mentor: Western New England University School of Law, 2001 - Present

### Awards, Achievements & Appointments Include:

Quoted: *Wall Street Journal*, When Heirs Collide, September 2014  
Recipient: SuperLawyers Massachusetts and New England Award, *Boston Magazine*, 2005 - 2014  
Quoted: Estate Planning: Put a Plan in Place to Ensure Pets' Care, *Kiplinger's Retirement Report*, June 2013  
Quoted: *Wall Street Journal*, Market Watch, 10 Things Estate Sales Won't Tell You, June 2013  
Quoted: *New York Times*, Childless and Aging? Time to Designate a Caregiver, September 11, 2012  
Recipient: Human Relations Award from the National Conference for Community & Justice of CT and Western MA, June 2011  
Quoted: ABC News' "Woman Accused of Scamming Boyfriend With Alzheimer's out of Millions", January 2011  
As seen on The Today Show on March 13, 2010

### Publications & Videos Include:

- Aging Behind the Wheel, *Healthcare News*, August 2015
- Thinking Ahead—Does My Adult Child Need a Legal Guardian After I'm Gone?, *Healthcare News*, April 2015
- Blog Contributor: Estate Planning Bits
- Things Not to Include in a Will—Documents Have Limitations, and Some Language is not Suitable, *Healthcare News*, June 2014
- Restoring Veterans' Benefits, *Healthcare News*, April 2014



# **ELIZABETH FORSPAN, ESQ.**

## **BIOGRAPHY**

Elizabeth Forspan is the Managing Attorney of the law firm Ronald Fatoullah & Associates. Elizabeth's areas of practice include Estate Planning, Taxation and Elder Care Planning. She regularly assists clients in achieving their Medicaid Planning goals in a tax efficient manner through practical and considerate planning techniques.

Elizabeth often lectures on various aspects of Elder Care Planning, Tax Law and Estate Planning. Elizabeth has lectured on the *Income Taxation of Trusts and Estates* for the National Business Institute as well as *Key Elder Care Planning Issues* for the New York State Society of CPA's Annual Estate Planning Conference in New York City. Elizabeth gave a lecture entitled *Planning for Your Clients' Incapacity: Don't Get Caught in the Trap!* at a joint Baruch College/NYSSCPA financial planning conference. Elizabeth has also written and lectured extensively on the topic of Casualty Loss Deductions. Elizabeth co-authored the award winning cover article for the February 2013 edition of the CPA Journal entitled "Casualty Losses for Property Damaged by Hurricane Sandy." In June of 2014, Elizabeth was the recipient of the prestigious Max Block Award for Outstanding Article in the Category of Technical Analysis, awarded by the New York State Society of Certified Public Accountants' CPA Journal for her article on casualty losses.

Elizabeth has been named a New York Metro Area Super Lawyer Rising Star in the area of Estate Planning and Probate for 2016 and 2017. Elizabeth and the firm have been featured in New York Magazine and Elizabeth has been quoted in the New York Times.

Prior to joining Ronald Fatoullah & Associates as its Managing Attorney, Elizabeth was an associate with a prominent New York Trusts and Estates law firm where she specialized in Elder Law, Taxation and Estate Planning. Prior to that, Elizabeth was a Tax Manager with Ernst & Young LLP, where she focused on Mergers and Acquisitions, Executive Compensation, Equity Compensation, Employment Tax and Employee Benefits. Elizabeth has extensive experience working on business transactions and tax based engagements in the financial services, retail and insurance industries on both the buyer and seller sides.

Elizabeth earned her Juris Doctor from Fordham University School of Law. Elizabeth received her B.A. from Queens College of the City University of New York, where she graduated *summa cum laude* and is a member of Phi Beta Kappa.





# JUDITH D. GRIMALDI, ESQ.

## BIOGRAPHY

Judith D. Grimaldi, is a partner in the pioneering elder law firm GRIMALDI & YEUNG LLP.

Ms. Grimaldi's perspective on the issues facing the mid-life individual is unique; it was shaped by more than a decade of field experience as a social worker. In this capacity, Ms. Grimaldi served as Director of a local hospital's Community Care Organization serving families facing chronic illness and an adjunct professor in Gerontology at Marymount Manhattan College. In addition, she was a Community Relations and Family Coordinator at South Beach Psychiatric Center of Brooklyn and Staten Island, New York. Each of these positions provided her with unique, first-hand encounters with the day-to-day impact of aging and disability on individuals and their families.

As an attorney for over 20 years, Ms. Grimaldi has represented the rights of the elderly and disabled. She has special expertise on Medicare and Medicaid, health law, trusts and wills and estates. Her particular focus is on family caregivers and homecare. Ms. Grimaldi is a Certified Elder Law Attorney. She has been named one of **"New York's Women Leaders in the Law 2012"**, by New York Magazine and after an extensive peer review and rating process, New York Magazine has named her one of New York's **"Best Lawyers" 2008 to present**, and has also been named **"Super Lawyer" since 2009**. She is also Peer Review Rated for ethical standards and legal ability through Martindale-Hubbell. She has received The Martindale-Hubbell AV Preeminent Rating, the highest possible achievement for an attorney for both ethical standards and legal ability. Ms. Grimaldi is currently an adjunct professor of Brooklyn Law School.

Ms. Grimaldi is a past President of the National Academy of Elder Law Attorneys (NAELA), New York Chapter; she is a NAELA Board Member, Member of NAELA's Advocacy Committee and member of NAELA's Council of Advanced Practitioners (CAP). She is currently the Chair-Elect of the New York State Bar Association's Elder Law & Special Needs Section and is a past Chair of the New York City Bar Association's Legal Problems of the Aging Committee; Charter member of the Academy of Special Needs Planners and the National Academy of Elder Law Attorneys, and was recently named to the National Board of the National Academy of Elder Law Attorneys. Ms. Grimaldi is also active in the Senior Issue Committee of New York City's Community Board 10, where she is currently working on developing a Bay Ridge Age Friendly Improvement District, and has recently authored a book, *"5@55", The 5 Essential Legal Documents You Need by Age 55"*.

A 1993 graduate of Brooklyn Law School, Ms. Grimaldi also holds an MSW from Hunter College of the City of New York (1982, with honors) and a BA from Marymount Manhattan College with a certificate in Gerontology (1980, summa cum laude).



## **LEE A. HOFFMAN, JR., ESQ.**

### **BIOGRAPHY**

Lee is currently an elder law practitioner, with the firm of Hoffman & Keating, with offices in New City and White Plains. He also practices in an “of counsel” capacity to the Workers’ Compensation practice of Hoffman, Wachtell & Rao. He received his law degree from NYU and has practiced in the area of what we now know as elder law since 1975. From 1975 to 1983, he supervised the Legal Services program for the Rockland County Office for the Aging under Title III-B of the Older Americans Act. Since then, his practice has focused on elder law, estate and financial planning and workers compensation. Lee has lectured on topics of interest to the elder law bar at many CLE programs for the state and local bar associations.

Lee is a Certified Elder Law Attorney (National Elder Law Foundation designation), has been a NAELA member since 1988 and is involved with state and local bar Elder Law Sections. Outside the office, he served as Village Justice for South Nyack from 1986 to 2001 and has also served on several land use boards and committees for the village. His avocations are still family (Mimi, two sons with spouses and children), photography and golf.



# **PAUL HYL, ESQ.**

## **BIOGRAPHY**

Paul Hyl is the principal of the Law Office of Paul Hyl, Esq., P.C., and practicing exclusively in the field of Trusts and Estates and Elder Law. Mr. Hyl advises clients regarding sophisticated estate planning matters, tax planning, asset preservation, Medicaid planning, wealth transfer strategies, charitable giving and estate and gift taxation issues.

Mr. Hyl practices before the Surrogate's Courts of Nassau and Suffolk Counties, the five boroughs of the City of New York, as well as Westchester and Dutchess Counties. Mr. Hyl is accredited by the Department of Veterans Affairs for the preparation, presentation and prosecution of claims for Veterans benefits. Previously, Mr. Hyl served as counsel to the Nassau County Public Administrator.

Mr. Hyl is an adjunct professor at Molloy College and a former adjunct professor at Dowling College. He is also a member of the New York State Bar Association and its Trusts and Estates Section. Locally, Mr. Hyl is a member of the Nassau County Bar Association, where he is the past Co-Chair of its Elder Law, Social Services and Health Advocacy Committee. Mr. Hyl is a member of the Estate Planning Council of Nassau County and a former member of the Board of Directors of the New York State Intergenerational Network – Long Island Chapter.

Mr. Hyl has been featured in Long Island Business News, Investor's Business Daily and Newsday's *Ask the Expert* column. He has authored numerous articles which have appeared in the Nassau Lawyer, the Suffolk Lawyer, the Daily News and Long Island Business News on topics such as business succession planning, estate planning for second marriages and various trust and estate administration issues. Mr. Hyl has also been featured as a guest on various radio and television programs, including WBAB, WFAN, WRHU, News 12 and WLNY TV 10/55.

Mr. Hyl is a frequent lecturer and educator. He has lectured at professional organizations and provided continuing legal education programs for the state and county bar associations. He has also lectured at assisted living facilities, senior citizen groups and colleges and universities, such as St. Joseph's College and Dowling College's Center for Intergenerational Policy & Practice. Mr. Hyl's charitable works include the Midnight Run relief effort to bring food and clothing to New York City's homeless and the Long Island Fight for Charity, for which he boxed in 2009 to raise money on behalf of several local charities.

Mr. Hyl received his Bachelors Degree in Psychology from Dowling College and his Juris Doctor from St. John's University School of Law. Mr. Hyl is a former member of the Farmingville Volunteer Fire Department, where he volunteered as a Firefighter and Emergency Medical Technician, as well as serving as Recording Secretary of the Department.



# PROFESSOR JOHN JACOBI

## BIOGRAPHY

Professor John Jacobi's work is primarily in the areas of Health, Finance, Insurance, and Access; Mental Health Law; and Disability Law.

Professor Jacobi received B.A., summa cum laude, from the State University College of New York at Buffalo and his J.D., magna cum laude, from Harvard Law School. He teaches in the areas of Health Law, Health Finance, Disability Law, Public Health Law, Mental Health Law, and Torts. Professor Jacobi spent five years working for the New Jersey Department of the Public Advocate as Special Assistant to the Commissioner, where he worked on health, civil rights, and disability issues through litigation and advocacy in legislatures and regulatory agencies. He then became a Gibbons Fellow at the Gibbons firm, where he pursued health, prisoners' rights, and disability issues. During 2007-2008 he was on leave from the law school, serving as Senior Associate Counsel to N.J. Governor Jon S. Corzine on Health, Human Services, and Children's Issues. He serves on the Board of the Greater Newark Healthcare Coalition, and the North Jersey Community Research Initiative, an HIV service organization.

Professor Jacobi serves as principal investigator on a number of grant-funded projects on topics including behavioral health integration, mental health parity, and health insurance reform. He writes and speaks on issues including disability rights, health access and finance, public health, and mental health. His recent and current scholarly projects include the application of the health reform law to the poor and people with disabilities, the implementation of mental health parity laws, state implementation of Medicaid and private health insurance reform, the improvement of chronic care in health systems, the funding and structure of services for children with disabilities, the obligations of government to provide services to people with serious mental illness, and the clash of disability rights and public health interests. He served on the Governor's Task Force on Mental Health, the Board of Advisors of the New Jersey Office of Child Advocacy, the New Jersey Olmstead Advisory Council on disability rights, and on other government and non-profit boards and committees. He is Faculty Director of the Seton Hall Health & Pharmaceutical Law & Policy Program.





# HOWARD S. KROOKS, ESQ., CELA, CAP

HKrooks@ElderLawAssociates.com / www.ElderLawAssociates.com

Howard S. Krooks, a partner of Elder Law Associates PA with offices throughout Southeast Florida, is admitted to practice law in New York (1990) and Florida (2004). Mr. Krooks is Of Counsel to Amoruso & Amoruso, LLP, in Rye Brook, New York.

Mr. Krooks splits his time between New York and Florida, where his professional practice is devoted to elder law and trusts and estates matters, including representing seniors and persons with special needs and their families in connection with asset preservation planning, supplemental needs trusts, Medicaid, Medicare, planning for disability, guardianship, wills, trusts and health care planning with advance directives.

Mr. Krooks is certified as an Elder Law Attorney by the National Elder Law Foundation and is a Past President of the National Academy of Elder Law Attorneys (NAELA; 2013-2014). He is also the current President of the New York chapter of NAELA and serves on the Executive Council of The Florida Bar Elder Law Section as the Administrative Vice-Chair and NAELA Liaison. He is a Past Chair of the Elder Law Section of the New York State Bar Association (NYSBA; 2005). He was selected as a Florida Super Lawyer and a New York Super Lawyer (2007- 2017). He was also named a Top 25 Westchester County Attorney (*New York Times* – Sept. 2012-2017). He was recognized as one of Florida's Legal Elite for 2016-2017. Mr. Krooks has a 10.0 (Excellent) rating from Avvo and is AV Preeminent<sup>®</sup> rated by Martindale-Hubbell, a testament that Mr. Krooks' peers rank him at the highest level of professional excellence.

Mr. Krooks received the Outstanding Achievement Award from the NY Chapter of NAELA in 2006 for serving as Co-Chair of a Special Committee on Medicaid Legislation formed by the NYSBA Elder Law Section to oppose NY Governor George Pataki's budget bills containing numerous restrictive Medicaid eligibility provisions that, if enacted, would severely impact the frail elderly and disabled populations. He was also recognized for serving as Co-Chair of the NYSBA Elder Law Section Compact Working Group, which received national attention for developing alternative methods of financing long-term care. Additionally, Mr. Krooks served as Chair of a Special Committee created by the NYSBA Elder Law Section to address the Statewide Commission on Fiduciary Appointments formed by Chief Justice Judith Kaye.

Mr. Krooks co-authored the chapter, "Creative Advocacy in Guardianship Settings: Medicaid and Estate Planning Including Transfer of Assets, Supplemental Needs Trusts and Protection of Disabled Family Members" included in *Guardianship Practice in New York State*, and the chapter "Long Term Care Insurance in New York" included in *Estate Planning and Will Drafting in New York*, both published by the NYSBA. He is widely published on many elder law topics. A former Adjunct Assistant Professor at New York University's School of Continuing and Professional Studies, Mr. Krooks taught Asset Protection Planning. He also served as an instructor for the NY Certified Guardian & Court Evaluator Training program.

Mr. Krooks is a Founding Principal of ElderCounsel LLC, the premier elder law and special needs planning document drafting solution for attorneys.

As a frequent lecturer, Mr. Krooks has addressed many organizations including NAELA, Stetson Special Needs Conference, ALI-ABA, ElderCounsel, WealthCounsel, the National Guardianship Association, the Florida Bar Association, the Academy of Florida Elder Law Attorneys, the NYSBA, the Association of the Bar of the City of New York, UJA Federation, the Brooklyn Bar Association, the Suffolk County Bar Association, the Richmond County Bar Association, Berkeley College, the United Federation of Teachers and the New York State United Teachers, among others. Mr. Krooks has been quoted in *The Wall Street Journal*, *The New York Times*, *Kiplinger's*, *USA Today*, *The New York Post*, *Newsday*, *The Journal News* and the *Boca Raton News*. He has appeared on PBS, the CBS Early Morning Show and elder law focused local cable television programs.



# **TAMMY ROSE LAWLOR, ESQ.**

## **BIOGRAPHY**

Tammy R. Lawlor, Esq. is a Partner at the Law Firm of Miller & Milone, P.C. located in Garden City, New York. Miller & Milone, P.C. is a full service law firm, practicing in Elder Law, Health Law, Estates and Trusts. Ms. Lawlor is a graduate of the Hofstra University School of Law and was admitted to the New York State Bar in 1997. She also holds a Masters of Business Administration, specializing in Finance. She has practiced with Miller & Milone, P.C. since 1997 and her practice focuses primarily on Guardianships. Ms. Lawlor has handled hundreds of Guardianships throughout the state of New York. She is appointed by the Court as Court Evaluator, Court Appointed Counsel, Counsel to Guardian, Temporary Guardian and Guardian for the Person and Property by the Courts in multiple counties. In addition she assists clients to engage in Medicaid planning, and has filed countless Medicaid applications.

She represents numerous hospitals, assisted living facilities and skilled nursing facilities in the New York Metropolitan area. She assists these institutions with their admissions policies and procedures, discharge issues, as well as their insurance and Medicaid issues. She also reaches out to those patients in their facilities that require assistance with advance directives, Medicaid planning and discusses the possibility of the appointment of a Guardian in the event they do not have anyone with legal authority to act on their behalf.

She is an active member of the New York State Bar Association Elder Law Section. She is on the Executive Committee for the New York State Bar Association, is Vice-Chair of the Legislation Committee and the Health Law Section Liaison for the Elder Law Section. She is a member of the Health Care Committee, Mental Health Committee, and the Unauthorized Practice of Law Task Force for the New York State Bar Association Elder Law Section. She is a member of the National Academy of Elder Law Attorneys and Treasurer of the NY NAELA. In addition, she is a member of the Nassau County Bar Association Elder Law Committee and the New York City Committee on Legal Problems - Issues of the Aging. She is also on the Hofstra University School of Health Professions and Human Services Dean's Advisory Board.

Ms. Lawlor has been a frequent speaker at engagements for fellow attorneys involving programs sponsored by local bar association, the New York State Bar Association, the various local bar associations, and the National Business Institute. She also presents regularly on a variety of topics to patients and clients at hospitals, assisted living facilities and skilled nursing facilities.



# **DAVID C. LEVEN, JD**

## **BIOGRAPHY**

David C. Leven is Executive Director Emeritus and Senior Consultant to End of Life Choices New York, after serving as its Executive Director from 2002 to 2016. He is an advocate for patients, seeking to improve care and expand choice for the dying. An expert on advance care planning, patient rights, palliative care and end-of-life issues, including medical aid in dying, Mr. Leven has played a leadership role in having legislation enacted in New York to improve pain, palliative and end-of-life care. He initiated the Palliative Care Education and Training Act, the Palliative Care Information Act and laws pertaining to health care proxies and required continuing medical education for doctors in pain, palliative care and the end of life. On medical aid in dying, Mr. Leven has lectured or debated on the topic at every New York City area law school as well as at Albany, Rutgers, Syracuse and Yale law schools.

Mr. Leven has served on numerous committees of the New York State Bar Association, including, among others, the Committee on Legal Aid, which he chaired for five years, the Committee on Women in the Law, the Special Committee on Alternatives to Court Resolution of Disputes and the Criminal Justice Section, Corrections Committee.

A graduate of the University of Rochester and Syracuse University College of Law, he is a recipient of numerous awards including the Public Interest Law Award of the New York State Bar Association Public Interest Committee and the Westchester Civil Liberties Union, Civil Liberties Award. He is a past Distinguished Lawyer in Residence at Touro Law School.



# **EDWARD MECHMANN, ESQ.**

## **BIOGRAPHY**

Edward Mechmann is the Director of Public Policy and the Director of Safe Environment at the Archdiocese of New York. He graduated from Cardinal Spellman High School, Columbia College (BA), Harvard Law School (JD) and St. Joseph's Seminary Institute of Religious Studies (MA). Since 1993 he has worked on public policy education and advocacy for the Archdiocese and since 2005, he has also overseen the child protection program. Before coming to the Archdiocese, he was a state and federal prosecutor in New York City, and has served as a volunteer in West Virginia with his wife and children. He is the author of a book on the social teaching of the Church, and writes a regular blog on the homepage of the Archdiocese on faith in the public square.





# **TIMOTHY MURPHY**

## **BIOGRAPHY**

Tim Murphy is one of the supervisors for the Protective Services for Adults and Family Type Homes for Adults programs for the Orange County Department of Social Services.

Tim's introduction to Government service began as an intern while in college at the Orange County Attorney's Office and then in the Orange County Department of Personnel.

Mr. Murphy is also a trainer for Hunter College Brookdale School of Aging and Healthy Living providing training on Financial Exploitation; Assessments for Abuse and Neglect of Impaired Adults.

He has served on the Board of Directors for Cornell Cooperative Extension in Orange County, Southwinds Retirement Home and is a former board member of United Way, Orange County. He has resided in Orange County all of his life; is a graduate of Leadership Orange, SUNY Orange and Marist College.



# **NEIL T. RIMSKY, ESQ.**

## **BIOGRAPHY**

Neil is the Chairman of the Trusts, Estates and Elder Law Group at Cuddy & Feder LLP. He has practiced Elder Care, Estate Planning and Disability Planning for more than 30 years. He advises clients relating to government programs available to assist seniors with health care needs, particularly custodial care and the array of housing options available to them. Neil has helped many couples with health care and estate planning, working in conjunction with a variety of professionals including accountants and geriatric care managers. He advises clients on long-term care insurance and protection of assets while providing for future care needs.

He regularly helps families with disabled children. This type of planning involves an in-depth knowledge of the services available in the community as well as legal issues, including private and institutional supplemental needs trusts.

### **Education**

- Duke University School of Law, J.D.; 1977
- University of Rochester, B.A. summa cum laude, Phi Beta Kappa; 1974

### **Admissions/Courts**

- New York

### **Professional Associations**

- New York State Bar Association, Elder Law Section, Executive Committee
- Westchester County Bar Association
- National Academy of Elder Law Attorneys (NAELA)
- NAELA's Council of Advanced Practitioners
- Certified Elder Law Attorney, certification issued by the National Elder Law Foundation

### **Community Service**

- Westchester Jewish Community Services

Prior board affiliation:

- Westchester Jewish Conference
- Alzheimer's Association, Westchester-Putnam Chapter, Inc.
- UJA-Federation, Campaign Cabinet



# **PATRICIA J. SHEVY, ESQ.**

## **BIOGRAPHY**

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

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

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

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

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

Tricia routinely lectures to small groups regarding estate tax planning, long term care planning, estate planning issues for parents of disabled children as well as the unique issues of estate planning for non-traditional families and small business owners. Tricia was honored with the opportunity to teach all attorneys applying for admission to practice by the New York State Board of Law Examiners the basics of powers of attorney, health care proxies and trusts. Tricia also regularly lectures and writes for continuing legal education programs offered by the New York State Bar Association.

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# **DAVID SILVA, ESQ.**

## **BIOGRAPHY**

David is the Program Director of the Independent Consumer Advocacy Network (ICAN) at Community Service Society. ICAN is New York's statewide ombudsprogram for people with Medicaid managed care who need long term care or behavioral health services. David helped to establish and implement this statewide network of 17 non-profits, which assists consumers through a toll-free hotline, education events in the community, and assistance with navigation and appeals. Since its inception four years ago, ICAN has provided one-on-one advocacy to over 18,000 people, and educational presentations to over 32,000 people. Prior to joining CSS in November 2014, David was the Assistant Director of the Evelyn Frank Legal Resources Program at New York Legal Assistance Group, and previously at Selfhelp Community Services. He has taught at Cardozo School of Law and is a frequent speaker and trainer on public health insurance topics.





# **PETER J. STRAUSS, ESQ.**

## **BIOGRAPHY**

Peter J. Strauss became Senior Partner at Pierro, Connor & Strauss, LLC in July 2018. Mr. Strauss counsels on trusts and estate law, elder law and guardianship law with a particular focus on the legal problems of seniors and persons with disabilities. He frequently lectures on these topics and is considered to be one of the pioneers in elder law in the United States. Mr. Strauss has special interest in issues involving capacity for the execution of legal documents and making health care decisions and the legal issues and rights of persons with respect to health care treatment at the end of life. He is known for his work in counseling individuals with disabilities, parents of children with special needs, designing special needs trusts, and advising clients as to how to pay for long-term care.

Before assuming the position of senior partner, Strauss practiced law at the New York City firm, Drinker Biddle & Reath, and previously was a partner at Epstein, Becker & Green in New York. He has been a Distinguished Adjunct Professor of Law at New York Law School for 28 years, teaching *Elder Law & Aging in America* and serving as Director of the guardianship clinic. He is a founding member and Fellow of the National Academy of Elder Law Attorneys and co-author of *The Complete Retirement Survival Guide*. Peter also serves as a member of the Board of Directors of JALBCA (Judges and Lawyers Breast Cancer Alert) and End of Life Choices New York.

Strauss earned his law degree at New York University School of Law and holds a B.A. in Political Science from Bowdoin College.



# **ANTHONY WEBB, PhD**

## **BIOGRAPHY**

**Tony Webb**, Research Director at SCEPA's Retirement Equity Lab (ReLab), is a widely recognized expert in retirement planning and policy. Prior to joining the retirement team at The New School's Schwartz Center for Economic Policy Analysis, Dr. Webb was a senior research economist at Boston College's Center for Retirement Research and a senior research analyst at the International Longevity Center.

His research interests include the impact of pension type on the retirement age, the financing of long-term care, and the management of the process of asset decumulation. In addition to publishing in academic journals, he has years of experience presenting his research to non-technical audiences both at non-academic conferences and through issue and policy briefs. His research has been supported by the U.S. Social Security Administration and the National Institute on Aging. He completed his PhD in economics from the University of California, San Diego.



# DEIRDRE R. WHEATLEY-LISS, ESQ.

Deirdre R. Wheatley-Liss divides her practice at Porzio Bromberg & Newman P.C., between representation of business owners and their businesses, counselling individuals and families, and advising non-profit entities.

## Business Owners and Business Representation

Ms. Wheatley-Liss counsels business owners on legal and structural issues related to start-up, financing, growth and exit strategy. As a tax attorney, she always keeps an eye on minimizing a business owner's "silent partner" – the IRS. By creating the most efficient organizational structures and contractual arrangements during the infancy and growth of a business she has helped clients keep hundreds of thousands of dollars in their pockets upon the sale of the mature business.

To educate both the public and the legal community about issues relating to business ownerships, Ms. Wheatley-Liss is a frequent lecturer to professionals and the public on topics related to start-up, intellectual property, employee and independent contractor issues, wealth transfer, tax minimization, business succession planning and cybersecurity.

## Data Privacy and Cybersecurity

Ms. Wheatley-Liss helps organizations to meet regulatory requirements by assessing current data privacy and cybersecurity policies against best practice frameworks. Deirdre provides counseling pertaining to policies and pre-incident planning, in order to minimize loss in the case of a potential breach. She is a frequent lecturer on best practices and corporate governance as related to privilege and cybersecurity.

## Individual and Family Representation

The core of Ms. Wheatley-Liss' practice is protecting the wealth her clients have earned and created over a lifetime – from taxes, long-term care costs, ill-equipped beneficiaries, divorce, lawsuits and mis-management by others. To do this she focuses on educating clients about how to make the legal system work to help them meet their goals and then carry out that plan. This may include creating wills and trusts, tax planning, advising an executor of an estate, representing a beneficiary in a disputed estate, crafting a long-term care asset protection plan, elder law counseling, special needs planning or guardianships.

Ms. Wheatley-Liss devotes time to educating the public and professional communities as well. She is an in-demand speaker on estate planning, elder law and special needs planning. She has blogged at New Jersey Estate Planning & Elder Law Blog, a leading commentary on developments in tax law, estate planning, estate administration, elder law and business law. Ms. Wheatley-Liss is the author of the published book "Plan Your Own Estate" and is working on a second book about Elder Law and Asset Protection Planning.

## Non-Profit Representation

Non-profit entities, whether educational institutions, community groups or family foundations, have unique needs and must meet stringent tax rules to maintain their non-profit status. Ms. Wheatley-Liss counsels these clients to educate them about those rules, develop strategies and best practices to meet their charitable goals, assist with tax filings and advocate before the IRS and tax authorities.

## Education and Community Involvement

Ms. Wheatley-Liss' continuous pursuit of knowledge distinguishes her from other practitioners in her fields. She has an LL.M in Taxation, an advanced legal degree. She is also accredited as a Certified Elder Law Attorney, by the American Bar Association approved National Elder Law Foundation, one of fewer than 100 attorneys in New Jersey with this credential. She hones her knowledge through continuous legal and business education to share "best practice" strategies with her clients.

## **Bar Admissions**

- ♦ New Jersey, 1997
- ♦ New York, 1998

## **Education**

New York University, New York, New York, LL.M in Taxation, 2000

Boston College School of Law, Newton, Massachusetts, J.D.,1995

Johns Hopkins University, Baltimore, Maryland, B.A., with honors, 1992



# **DANIELLE M. VISVADER, ESQ.**

## **BIOGRAPHY**

Danielle M. Visvader has been with Abrams, Fensterman, Fensterman, Eisman, Formato, Ferrara, Wolf & Carone, LLP for over fourteen (14) years. When she first joined the firm, Ms. Visvader predominantly practiced Elder Law and specifically concentrated on Article 81 guardianship proceedings for both individuals and institutional clients, including nursing homes and hospitals. She subsequently expanded her practice to include Mental Health Law, dealing with the retention and treatment of patients in psychiatric facilities. Ms. Visvader also made it a point to familiarize herself with the regulations governing institutional and community Medicaid and Medicaid planning in an effort to more effectively represent her Elder Law clients.

Additionally, Ms. Visvader handles residential real estate purchases and sales, which compliments her Guardianship Practice. She is well-versed in proceedings under Article 17 of the RPAPL and she routinely represents Court-appointed Guardians in order to obtain Court approval for the sale of property by the Guardian.

Ms. Visvader is eligible for court appointments in various counties, including Nassau, Suffolk, and Westchester, and within New York City, as Guardian, Court Evaluator and Counsel for alleged incapacitated persons, pursuant to Part 36 of the Rules of the Chief Judge of the New York State Unified Court System.

Ms. Visvader was selected to the 2013 - 2017 New York Rising Stars list. Each year, no more than 2.5% of the lawyers in the state are selected by the research team at Super Lawyers to receive this honor.

Ms. Visvader also received Long Island Business News' Leadership in Law award in 2013.

Ms. Visvader received her B.A. from Fordham University and her J.D. from Hofstra University School of Law, where she served on the Journal of International Business and Law and the Moot Court Association. She is an active member in various professional and civic organizations such as the New York State Bar Association, where she is a member of the Elder Law section, and the Nassau County Bar Association, where she is the current Co-Chair of the Elder Law section.

