

Speaker Biographies

AMY B. BELLER, ESQ.

Biography

Ms. Beller is a founding member of Beller Smith, P.L., a full-service trusts and estates firm located in Boca Raton, Florida. A 1992 graduate of Hofstra Law School, Ms. Beller began her legal career in New York with firms such as White & Case and Chadbourne & Parke. Ms. Beller relocated to Florida in 2004, and was associated with Kaye Scholer's West Palm Beach office. Ms. Beller founded Beller Smith with fellow New York attorney, Yoshimi O. Smith, Esq., in late 2009.

Ms. Beller is a Fellow of the American College of Trust and Estate Counsel (ACTEC). She is a Member of the Executive Committee of the Real Property, Probate and Trust Law Section of the Florida Bar, a member of the Palm Beach County Bar Association, the South Palm Beach County Bar Association, and the New York Bar Association's Trusts and Estate's Section. She is Board Certified in Wills, Trusts and Estates, and is a certified Circuit Civil Mediator. Ms. Beller's primary focus within the trusts and estates practice is in litigation and dispute resolution.

A prolific speaker and author, Ms. Beller has published in the *New York State Bar Association Trusts & Estates Section Newsletter*, the *Florida Bar Real Property, Probate and Trust Law Section's Actionline*, the *Florida Bar's Litigation Under the Probate Code (Eleventh Ed.)*, and the American Bar Association's book, *The Road to Independence: 101 Women's Journeys to Starting Their Own Law Firms*. Ms. Beller has lectured for ACTEC, the New York State Bar, the Florida Bar, the City Bar (New York), and the Heckerling Institute, among others, on topics including Florida homestead, beneficiary rights, privity and malpractice, estate planning to avoid disputes, multistate estate planning, and mediation.

HONORABLE JOHN M. CZYGIER, JR.

Biography

John M. Czygier, Jr. was admitted to practice law in New York State in 1975. After serving as a prosecutor in the Suffolk County District Attorney's office, he entered private practice and, for twenty-five years, concentrated in estate administration and estate litigation in the New York metropolitan area. He was awarded an "AV" rating by Martindale-Hubbell, the highest rating for practicing attorneys. He is a member of the Suffolk County Bar Association, where he served as Director, Chair of the Surrogate's Court Committee and Co-Chair of the Bench Bar Committee. He is also a member and former Director of the Suffolk County Women's Bar Association. While in private practice, Surrogate Czygier served as a Mental Hygiene Law Article 81 Court Examiner for New York and Suffolk Counties, and was counsel to the Public Administrator of Suffolk County.

On April 26, 2001, Judge Czygier was appointed Judge of the Surrogate's Court of Suffolk County by Governor George Pataki and subsequently confirmed by the New York State Senate on May 8, 2001. In November, 2001 he was elected to a ten-year term, and was re-elected in November 2011; he was a Judicial Fellow of the prestigious American College of Trust and Estate Counsel. He retired from the bench on December 31, 2018.

In October of 2000, Judge Czygier was elected to the Fellows of the New York Bar Foundation. He is a member of the Surrogate's Association of the State of New York, where he previously served as Secretary/Treasurer, Vice President and President. He is a member of the Trusts and Estates Law Section of the New York State Bar Association where he served on the Estate and Trust Administration Committee, and was formerly a vice-chairman of the Estate Litigation Sub-Committee. He has also served on the Committee on Trusts, Estates & Surrogate's Courts of the Association of the Bar of the City of New York.

In addition to his involvement in numerous professional associations, Surrogate Czygier has played an active role on various Committees to improve the law, administration and practice in the Surrogate field. Judge Czygier has served as a member of the Surrogate's Court Advisory Committee to the Chief Administrative Judge of the Courts of the State of New York since his appointment in 1999 by the Hon. Jonathan Lippman. He has also been a member of the EPTL-SCPA Legislative Advisory Committee; the mission of both committees is to review existing statutes and to draft legislation. In 2009, he was appointed to The Administrative Board for the Offices of the Public Administrator where he served as Chair, and he has served as Chairman of the Distinguished Alumni on the Bench at Hofstra Law School. He has lectured on various aspects of Trust and Estate Law at numerous law schools, state and local bar associations, and has trained newly elected Surrogate Judges at the New York Judicial Institute. Judge Czygier has also been a contributing author to *Warren's Heaton on Surrogates' Courts* (Matthew Bender) and to *Weinstein, Korn & Miller New York Civil Practice* (Matthew Bender), and has written for the New York State Bar Association Trusts and Estates Newsletter, the New York Law Journal, and the New York State Bar Association Journal.

GARY B. FREIDMAN, ESQ.

Biography

GARY B. FREIDMAN was graduated from St. John's University School of Law in 1978 and was admitted to the New York bar in 1979. He received a Master's degree in Taxation from New York University Graduate School of Law in 1982. Mr. Freidman received his B.A. in Economics from Queens College of the City University of New York in 1975.

From 1979 to 1981, Mr. Freidman served as an appellate law assistant to the Justices of the Appellate Division of the Supreme Court, Second Judicial Department. There, he was responsible for the preparation of confidential bench memoranda analyzing pending appeals for the Justices. In 1981, he joined Greenfield Stein & Senior, LLP (then known as Greenfield Eisenberg Stein & Senior) as an associate, becoming a member of the firm in 1986. His practice is in trust and estate related litigation.

Mr. Freidman has been involved in numerous contested Surrogate's Courts proceedings, both as an advocate and a mediator and has participated in trials and hearings in the Surrogate's Courts. These matters involved diverse issues such as the extent to which an *in terrorem* clause may be enforced, the validity of a charitable remainder unitrust, investment loss disputes, objections to wills and accountings, the jurisdiction of the Surrogate's Court and the validity of pre-death gifts.

Mr. Freidman has lectured on Mediation and Surrogate's Court matters before the American Law Institute; the New York State Bar Association; the Association of the Bar of the City of New York; the Surrogate's Association of the State of New York, the Elder Law Section of the New York State Bar Association, the New York State Society of Certified Public Accountants, the American Bankers Association and the Richmond and Suffolk County Bar Associations. In addition, he has lectured on Surrogate's Court and litigation matters at Cardozo Law School and the New School for Social Research.

Mr. Freidman has authored numerous articles in the field for the New York State Bar Association and the New York Law Journal.

Mr. Freidman is a Fellow of the American College of Trust and Estate Counsel, a member of the American Bar Association (Real Property, Probate and Trust Law Section), the New York State Bar Association (Former Chair, Trusts and Estates Law Section; Former Chair, Estate Litigation and Legislation Committees), the Association of the Bar of the City of New York (Committee on Trusts, Estates and Surrogate's Courts) and the Westchester County Bar Association.

Mr. Freidman has received an "AV" rating from the Martindale-Hubbell Law Directory and has been ranked by Chambers High Net Worth 2017, 2018 and 2019 in its highest tier, Band 1 in Private Wealth Disputes, across the United States of America. Mr. Freidman has been named as a "Super Lawyer" for 2006 through 2019 (<http://www.superlawyers.com>).

ANGELO M. GRASSO, ESQ.

Biography

Angelo M. Grasso is a partner at Greenfield Stein & Senior, LLP, whose practice is in trusts & estates litigation and contested Article 81 guardianships. Angelo represents clients in a variety of proceedings in Surrogate's Court, including will contests, discovery proceedings, contested accountings, and guardianship proceedings. Angelo has served as lead counsel on trials in Surrogate's and Supreme Court, and argued appeals in the Appellate Division.

Angelo is a frequent lecturer on Surrogate's Court matters, and co-chaired the New York State Bar Association's 2014 program on Discovery Proceedings. Angelo is an active member of the Trusts and Estates committee of the New York State Bar Association, where he serves on the Executive Committee, is the Chair of the Surrogate's Court Committee, and will co-chair the section's Spring 2019 meeting in Naples, Florida. He is also a member of the Trusts, Estates and Surrogate's Court Committee of the New York City Bar Association, and the Westchester County Bar Association.

Angelo graduated from the Georgetown University Law Center in 2002, where he was an associate editor of the *American Criminal Law Review*, and was admitted to practice in New York in 2003. He received his B.A. from Columbia University in 1999, where he wrote his senior thesis on the history of American anarchism.

Prior to joining Greenfield Stein & Senior, Angelo was an associate at Cahill Gordon & Reindel, LLP, Mongelli, P.C., and Littman Krooks LLP. He joined Greenfield Stein & Senior in 2008, and became a member of the firm in 2016.

Angelo resides in Westchester with his wife Hilary, daughter Zoë, and goldendoodle Phoebe. He is an active member of the Board of Directors of the Music Conservatory of Westchester.

Articles and Publications

Electronic Discovery in Surrogate's Court Litigation, Part II: Surrogate's Court Decisions, New York State Bar Association Trusts and Estates Law Section Newsletter, Fall, Vol. 51, No. 3, 2018

Electronic Discovery in Surrogate's Court Litigation, Part I: An Introduction to Electronic Discovery Concepts, New York State Bar Association Trusts and Estates Law Section Newsletter, Winter, Vol. 50, No. 4, 2018

Current Ethics Issues for Trusts & Estates Attorneys, New York State Bar Association Program "Conducting SCPA §1404 Discovery," Fall 2017

Honors and Awards

AV Rating, Martindale Hubbell

Super Lawyer, New York *Super Lawyers* magazine, 2018

Rising Star, New York *Super Lawyers* magazine, 2014-2017

RAYMOND JOSEPH

Biography

Raymond Joseph, Jr. is a Managing Director and the Global Head of Portfolio Solutions at Citi Investment Management. In this capacity, Ray oversees the global portfolio solutions team responsible for managing assets for high net worth individuals, pensions, endowments, and charitable organizations. He also has responsibility for the traditional investment strategies research and due diligence team. Additionally, Ray is a voting member of the Private Bank's Global Investment Committee, which sets tactical asset allocation recommendations for investment solutions on both a discretionary and advisory basis.

Prior to joining Citi, Ray was a Managing Director and Head of Portfolio Management & Model Solutions at UBS Wealth Management Americas where he oversaw the day-to-day management of the portfolio managers constructing and managing equity, fixed income, liquid alternatives, and multi-asset class discretionary portfolios and models. He was also responsible for the traditional investment strategies manager research team.

Before his role at UBS, Ray was a Vice President and Research Analyst for AllianceBernstein, a global investment management firm. At AllianceBernstein, he was responsible for the firm's global investments in financial services and healthcare service companies including stock recommendations for value, core, growth, thematic, long/short, and market neutral portfolios.

Prior to joining AllianceBernstein, Ray worked ten years as an Equity Analyst and Portfolio Manager at Capital Research Company, investment adviser to the American Funds. His previous professional experience also includes roles at Merrill Lynch and Morgan Stanley.

Ray received his MBA from Harvard Business School and his BA in Government from Harvard College.

SURROGATE PETER J. KELLY

Biography

Surrogate Kelly is a graduate of Iona College and St. John's University School of Law where he received his Juris Doctor degree in 1983.

Prior to his election to the bench, Surrogate Kelly was employed in the New York City Criminal and Civil Courts as a Law Assistant Trial Part, in the Queens Supreme Court as Principal Law Clerk, and, ultimately, as the Principal Law Clerk for Queens Surrogate Hon. Robert L. Nahman.

He was elected as a Judge of the New York City Civil Court in 1998 and as a Justice of the New York State Supreme Court in 2002. Thereafter he was elected as Surrogate of Queens County and has served in that capacity since January of 2011.

In addition to his regular duties, Surrogate Kelly has served as an instructor for court clerks and has frequently lectured at various bar associations and organizations including the Queens County Bar Association, the Nassau County Bar Association, the New York State Bar Association, the New York State Trial Lawyers Association, the New York State Surrogate's Association, and the New York State Judicial Institute.

Surrogate Kelly is a member of the Surrogate's Court Advisory Committee to the Chief Administrative Judge, and serves as Chair of the Executive Committee of the New York State Surrogate's Association. He is also a member of the Trust and Estates section of the New York State Bar association, the Queens County Bar Association, the Queens County Women's Bar Association, and the Queens Catholic Lawyer's Guild, serving as Judicial Moderator since 2009. He is also a former member of the Board of Directors of the New York City Supreme Court Justices' Association and the New York City Civil Court Judges Association.

Surrogate Kelly is admitted to the New York State Bar as well as the United States District Court for the Southern District and the United States Supreme Court.

TONI ANN KRUSE, ESQ.

Biography

Toni Ann Kruse, a partner at McDermott Will & Emery, focuses her practice on estate and wealth transfer planning. She advises clients on estate, gift and generation-skipping transfer tax issues, trust and estate administration, and charitable planning, as well as contested trust and estate matters. She has significant experience working with family companies, drafting and administering complex estate plans for domestic and multinational high-net-worth individuals and families, implementing leveraged wealth transfer techniques and counseling fiduciaries in estate administration.

Toni Ann received the 2012 McDermott Award for Commitment to Pro Bono and Community Service, in part for her work leading a team of 70 tax lawyers from the Firm to create a global index and report on charity law and philanthropy incentives. The index scores the tax readiness for philanthropy of all 193 United Nations countries. Toni Ann formally introduced the project to hundreds of participants at The Nexus Global Youth Summit. It serves as a reference and benchmark for civil society organizations to promote a United Nations resolution calling for a global campaign for a culture of philanthropy.

Toni Ann has been appointed a 2016-2017 ACTEC Foundation Young Leader. Toni Ann serves as the chair of the New York office's Pro Bono and Community Service Committee.

While in law school, Toni Ann was the note editor for the *Boston College Journal of Law and Social Justice*.

RECOGNITION

American Bar Association, one of five attorneys selected to serve as a Trust and Estates Fellow for the Real Property, Trust and Estate Section for 2014–2016

ACTEC Foundation Young Leader, 2016–2018

Super Lawyers, Estate Planning & Probate: New York, 2017 & 2018

COMMUNITY

American Bar Association, Real Property, Trusts & Estates Section; charitable organizations co-chair, fellows vice-chair and membership member

New York State Bar Association, Estate and Trust Administration Committee member

CREDENTIALS

Education

Boston College Law School, JD, 2008

Boston College, BA, 2003

Admissions

New York

HONORABLE ACEA M. MOSEY

Biography

Judge Mosey is a lifelong resident of Western New York. She graduated from Amherst High School in 1985. She earned a Bachelors in Business Administration degree from Canisius College in 1992 and then went on to the Thomas M. Cooley School of Law in Lansing, Michigan. She graduated with her Juris Doctorate in 1994 and was admitted to the New York State Bar in March 1995.

Having practiced as a private attorney in Surrogate's Court for over twenty years, including 14 years as Erie County Public Administrator under former Surrogate Judge Barbara Howe, Judge Mosey was elected as New York State Surrogate Judge for the County of Erie in November of 2017.

Judge Mosey was a founding partner with the firm Mosey Associates LLP, formerly known as Mosey Persico LLP, located at 625 Delaware Avenue in Buffalo, New York. She previously served as a Commissioner at the Erie County Water Authority from May 2000 to May 2006, being the first woman to serve as a Commissioner as well as a Chair at this Authority. She gained a vast amount of business experience from her employment with a family-owned, Great Lakes Bureau, Inc. for over twelve years, along with being the trustee of her family's trust which runs and operates, or is involved in, over 20 local companies and businesses.

Judge Mosey resides in Buffalo, New York. She is a lifelong member of St. John Maron Church. She is a member of the New York State Bar Association, the Bar Association of Erie County, and the Western New York Women's Bar Association.

Judge Mosey has been a proud member of her community, previously serving on several boards including the Greater Buffalo Savings Bank, Canisius College Board of Trustees, The Buffalo Zoo Board as well as the Children's Hospital Foundation.

NATALIA MURPHY, ESQ.

Biography

Natalia Murphy is Head of Trust and Wealth Planning for North America, Citi Private Bank. Based in New York, Natalia leads a high performing wealth planning team dedicated to delivering sophisticated and comprehensive wealth planning services for ultra-high net worth families globally.

Prior to joining the Private Bank, Natalia practiced law in New York for fourteen years focusing her practice on sophisticated estate and trust planning for affluent US and international families.

Natalia graduated from St. Francis College with a B.A., summa cum laude, in Economics and Political Science and received her J.D., Dean's List, from St. John's University School of Law. She is a member of the Bars of the State of New York and the State of Connecticut.

Natalia is a Fellow of the American College of Trust and Estate Counsel (ACTEC), a prestigious organization of trust and estate attorneys who have achieved top professional recognition in their field. She is Chair of the Trusts and Estates Law Section of the New York State Bar Association, a member of the Society of Trusts and Estates Practitioners (STEP), a member of the Committee on Investment of Funds of the Association of the Bar of the City of New York and the Association of the Bar of the City of New York Fund, Inc., and a member of the Trusts and Estates Advisory Group to the Board of the Optometric Center of New York, State University of New York College of Optometry.

Natalia is fluent in Russian and Ukrainian.

ERIC PENZER, ESQ.

Biography

Eric W. Penzer is a Partner at Farrell Fritz's Uniondale office where he concentrates in trust and estate litigation. His practice includes contested probate proceedings, fiduciary accounting proceedings, discovery proceedings, and other litigation related to estates and trusts. He is a frequent contributor to Farrell Fritz's New York Trusts & Estates Litigation blog, a frequent author, and lecturer on trust and estate litigation topics.

EDUCATION

- Fordham University School of Law
- State University of New York at Stony Brook

AFFILIATIONS & APPOINTMENTS

- American College of Trust and Estate Counsel (ACTEC), Fellow
- New York State Bar Association, Member, Executive Committee, Trusts and Estates Section
- New York State Bar Association, Former Chairperson, Practice & Ethics Committee, Trusts and Estates Section
- New York State Bar Association, Former Chairperson, Litigation Committee, Trusts and Estates Section
- New York City Bar Association, Member, Estates & Gift Taxation Committee
- Nassau County Bar Association, Member, Surrogate's Court Estates & Trusts Committee

HONORABLE STACY L. PETTIT

Biography

Judge Pettit is the Surrogate in Albany County, serving since January 2015. A graduate of Vassar College in 1981 and Albany Law School in 1984, she practiced law for the first half of her career, concentrating in Surrogate's Court practice, estate and trust planning and administration. Judge Pettit then worked as a law clerk and as chief clerk of Albany Surrogate's Court for many years. She also worked for a few years as an appellate court attorney at the Appellate Division, Third Department, before she became a judge.

Prior to her election in 2014, Judge Pettit was vetted by the New York State Independent Judicial Election Qualification Commission and received its highest rating – "highly qualified" – for the Surrogate's Court judge position. She currently serves on the Editorial Board of Warren's Heaton on Surrogate's Court Practice, on the Office of Court Administration's Judicial Institute Curriculum Advisory Committee, and as a member of the New York State Surrogates' Association. An active member of the New York State Bar Association, she has previously served as chair of the committee on Surrogate's Court and as Third District Representative of the Trusts & Estates section, and as a delegate to the New York State Bar House of Delegates. She has also served on several Office of Court Administration Surrogate's Court committees. She writes and presents on trusts and estates topics for numerous organizations.

HONORABLE MARGARET C. REILLY

Biography

Margaret (Meg) Reilly was appointed to the Nassau County District Court in May, 1998. In November 1998, she was elected to the District Court, representing the 4th District, which consists of the Town of Oyster Bay and the City of Glen Cove. She was re-elected as a Nassau County District Court Judge in 2004 and again in 2010. In December 2006, she was appointed as an acting Nassau County Court Judge. In November 2011, she was elected to the Nassau County Supreme Court. In November 2015, she was elected the Surrogate of Nassau County. On January 1, 2016, she began her term as Surrogate.

Meg graduated from Hamilton College with honors in Classical Studies and received her law degree from St. John's University School of Law.

After law school, she was appointed as Deputy County Attorney in the Litigation Bureau where she tried many cases, including civil rights and other tort matters. She then entered private practice and served as a trial attorney in all types of tort litigation, including medical, dental and legal malpractice. During this time, she served as the Prosecutor for the Village of Stewart Manor. In addition, she served as adjunct professor in Trial Advocacy at St. John's University School of Law.

Meg has served as the chairperson for the Nassau County Bar Association Defendant's Roundtable. She also served as an appointed member of the Nassau County Bar Association Judiciary Committee. She has lectured for the Nassau and Suffolk Academies of Law, Touro Law School and Hofstra University School of Law. She served as Co-Chair of the Nassau County Court's Women in the Courts Committee from 2004 to 2012. She served on the Irish Advisory Board of the Irish Institute at Molloy College. In addition, she is currently a member of the Board of Trustees of the Boys and Girls Club of Oyster Bay-East Norwich, a member of the Pastoral Council of St. Dominic's of Oyster Bay, the Immaculate Heart of Mary Guild and Ladies Ancient Order of Hibernians. She is the former Vice-President of the Parents Council of the Boys and Girls Club of Oyster Bay-East Norwich.

During her tenure as Judge, she has been the recipient of several awards, including the Fraternal Order of Police Fidelis Juri Award and the Court Officers Benevolent Association of Nassau County Fidelis Juri Award.

ELISA SHEVLIN RIZZO, ESQ.

Biography

Before joining Northern Trust in 2017 as Senior Fiduciary Officer and Senior Legal Counsel, Elisa was Managing Director, Trust Counsel and, most recently, Director of Estate Administration with Fiduciary Trust Company International. There, she led the restructuring of FTCI's estate administration department, provided guidance on a variety of wealth planning, administration and fiduciary issues and oversaw the administration of complex estate arrangements.

EDUCATION

She received her J.D. from Fordham University School of Law and her B.A. from the College of the Holy Cross.

CREDENTIALS

She has been profiled in Barron's and has presented before audiences for various organizations including the New York State Bar Association (NYSBA), the Family Office Exchange and the American Heart Association.

EXPERTISE

As head of fiduciary and legal counsel in Greater New York, she's responsible for delivering fiduciary service, legal counsel and holistic advice to trust advisors, wealth advisors, advisory account managers and wealth strategists.

COMMUNITY INVOLVEMENT

Elisa is a member of the Board of Directors of Fordham University School of Law Alumni Association, Vice-Chair of the Trust and Estate Administration Committee for the NYSBA Trusts and Estates Section, a member of the NYSBA Trust and Estates Section Taxation Committee and a past member of the NYC Bar Association Estate and Gift Taxation Committee. Outside of her professional commitments, Elisa also serves on the Board of Directors of The Chapel School's Blue Ribbon Foundation and is a past president of The Junior League of Bronxville.

FRANK T. SANTORO, ESQ.

Biography

Frank T. Santoro is a partner at Farrell Fritz P.C.'s Uniondale office where he practices trusts and estates law, concentrating in trusts and estates litigation. He represents clients in New York State Surrogate's Court in probate contests, contested accounting proceedings, discovery proceedings, and other miscellaneous proceedings, and in actions and proceedings in Supreme Court and federal court relating to trusts and estates. He also represents clients in Article 81 Guardianship Proceedings before the Supreme Court.

Frank lectures to numerous organizations on various trusts and estates litigation topics. In 2011 and 2012, he co-presented, Till Death or Divorce Do Us Part, for the Matrimonial INNS of COURT at the Nassau County Bar Association; to the Nassau and Suffolk Academies of Law; to the New York Financial Planners Association, to St. John's University School of Law and to the Queens Bar Association.

He has also lectured to the Nassau and Suffolk County Bar Associations on the subject of contested accounting proceedings in the Surrogate's Court and is a contributor to Farrell Fritz's New York Trusts & Estates Litigation blog.

Education

- Brooklyn Law School
- State University of New York at Binghamton

Bar Admissions

- New York

Court Admissions

- U.S.D.C., Southern District of New York
- U.S.D.C., Eastern District of New York
- U.S.D.C., Western District of New York

Affiliations & Appointments

- New York State Bar Association
- Nassau County Bar Association

MICHAEL S. SCHWARTZ, ESQ.

Biography

Mr. Schwartz, partner of the international law firm Curtis, Mallet-Prevost, Colt & Mosle LLP, was the co-author of the recently published 14th edition of *Stocker on Drawing Wills and Trusts*. He also has written articles on a wide range of current topics relating to trusts, estate planning and administration for significant industry publications such as *Estate Planning*, *Probate and Property*, *New York Law Journal*, *Law360*, *Trusts & Estates*, *The Senior Lawyer* and the *New York State Bar Association Trusts and Estates Law Section Newsletter*. Mr. Schwartz is also a prolific speaker on various estate and trust topics.

Mr. Schwartz's leadership in the field of trusts and estates is further reflected by his active roles in a number of key professional organizations. For example, Michael serves as the First District Representative of the Trusts and Estates section of the New York State Bar Association, and recently finished his term as the chair of the Estate and Trust Administration Committee. He is also a Fellow of The American College of Trust and Estate Counsel (ACTEC).

Mr. Schwartz counsels clients on domestic and multijurisdictional estate and succession planning, extending to all facets of estate, gift and generation-skipping transfer tax planning. Michael's practice at Curtis additionally encompasses all phases of estate and trust administration.

HONORABLE VINCENT W. VERSACI

Biography

Hon. Vincent W. Versaci began serving Schenectady County as Surrogate's Court Judge in May, 2010 after the NYS Senate unanimously confirmed Governor Paterson's earlier nomination. Judge Versaci ran a successful campaign and was elected to a 10-year Term commencing January 1, 2011. Also in January, 2011, Judge Versaci was appointed as a full-time Acting Supreme Court Justice in the Fourth Judicial District.

Judge Versaci began his judicial career when he was elected Schenectady City Court Judge in 2002. During his tenure on the City Court Bench, Judge Versaci also served as an Acting County Court Judge, and as the Supervising Judge for Town and Village Courts for the 4th Judicial District.

Prior to becoming a full-time jurist in 2004, Judge Versaci worked as an Associate Attorney with the Law Offices of Frank M. Putorti, Jr., P.C. and with Sciocchetti, Parisi and Saccocio, P.C. Judge Versaci was admitted to the New York State Bar in 1997 after having obtained his Juris Doctor from Albany Law School in 1996.

Judge Versaci was recently appointed by Chief Administrative Judge Lawrence K. Marks to serve as a member of the Surrogate's Court Advisory Committee, chaired by the Hon. Renee R. Roth. This standing committee of the Chief Administrative Judge reviews recent and proposed legislation regarding the Estates, Powers and Trusts Law, and the Surrogate's Court Procedure Act, and has been instrumental in securing the enactment of new legislation and recommending changes to the statutes and rules pertaining to the affairs of decedents and the operations of the Surrogate's Courts of New York State.

Judge Versaci is also a member of the Surrogate's Court Sub-committee of the ADR Committee. This sub-committee is currently reviewing alternative dispute resolution initiatives as they pertain to particular disputes that commonly occur in Surrogate's Court proceedings.

HONORABLE THERESA WHELAN

Biography

Theresa Whelan is the Suffolk County Surrogate's Court Judge and presides over proceedings involving wills, trusts and estates, as well as guardianship matters. She was elected to this position in November, 2018 and took the bench January, 2019.

Prior to her election as Surrogate, Judge Whelan was a Family Court Judge. She was first elected to the Family Court in 2007 and was re-elected to another ten-year term in 2017. As a Family Court Judge, Judge Whelan heard primarily child abuse and neglect cases and presided over Family Treatment Court.

Judge Whelan was appointed Supervising Judge of the Suffolk County Family Court in February, 2016. In that role, she supervised a court consisting of eight to ten judges, five referees and numerous support magistrates. During her tenure, she has reformed court practice to better accommodate the needs of the parties and litigants.

In 2009, the Office of Court Administration appointed Judge Whelan as Lead Judge of the Suffolk County Child Welfare Court Improvement Project. This local child welfare collaborative is part of statewide initiative to address court practices in cases where the court has removed children from their parents' care.

Judge Whelan was the Chair of the Suffolk County Attorneys for Children Advisory Committee which is responsible for considering the qualifications of new applicants to the Attorneys for Children panel, as well as reviewing the recertification applications for existing lawyers. The Advisory Committee also addresses issues that may arise with lawyers, conducts the annual training and ensures a fair and efficient rotation of lawyers available to take assignments from the Family Court.

In 2017, Chief Administrative Judge Larry Marks appointed Judge Whelan to the Family Court Advisory and Rules Committee, a statewide committee which meets monthly. That committee reviews proposed legislation and drafts its own proposals in the area of family law. More recently, Chief Judge Janet DiFiore appointed Judge Whelan to the New York State Commission on Parental Representation, which is tasked with holding public hearings throughout the state and reporting on the status and quality of lawyers representing parents in child welfare cases.

Judge Whelan began her law career in 1988 as a Suffolk County Assistant County Attorney. In 1990 she began her career in the judicial system, serving as a law clerk to three Supreme Court Justices: the Hon. Eli Wager (Nassau County), the Hon. Mary M. Werner, and the Hon. William B. Rebolini. As law clerk, she conferenced thousands of cases with attorneys and self-represented litigants, conducted legal research and drafted hundreds of decisions and orders. During her 17 years in the Supreme Court, she worked in nearly every part of that court, including civil litigation, guardianship, tax certiorari and condemnation cases, as well as matrimonial matters.

Judge Whelan is an active member of the Suffolk County Bar Association, where she was co-chair of the Family Court Committee from 2013-2016. She has lectured for the Law Academy, Judicial Institute and other law organizations. As a member of the Attorney for Child Task Force, she and the other members received the Suffolk County Bar Association's President's Award in 2016 for their work. Judge Whelan is also a member and past president of the Suffolk County Women's Bar Association.

Judge Whelan received a Bachelor of Arts degree in English and a Master of Science degree in Policy Analysis and Public Management from the State University of New York at Stony Brook. She holds a Juris Doctor from Albany Law School.