

BIOGRAPHIES

MARY ANN D. ALLEN, ESQ.

Biography

Mary Ann D. Allen, Esq. became the executive director and chief executive officer of Wildwood Programs, Inc. on January 1, 2002. She is a 1978 graduate of St. Lawrence University, where she received a B.A. in Government and English Literature, *magna cum laude*. She is a member of Phi Beta Kappa, and a 1981 *cum laude* graduate of Albany Law School. Prior to her work with Wildwood, she was a civil litigation attorney in private practice for approximately twenty years.

In her current position, Ms. Allen leads a non-profit human services organization with over 750 employees and an annual budget of approximately \$40 million. Wildwood annually provides a broad range of community-based supports and services in the Capital District region of upstate New York to over 3,000 children, adults and families who live with complex learning disabilities, autism and other developmental disabilities.

CORA A. ALSANTE, ESQ. Biography

Cora A. Alsante is the Leader of the Elder Law & Special Needs Practice and a partner in the Tax and Trusts & Estates Practices of Hancock Estabrook, LLP, Syracuse, NY. She is also a member of the Firm's Executive Committee. Ms. Alsante focuses her practice on estate planning, trusts, planning for the elderly and disabled, and estate and trust administration. She represents individuals and numerous assisted living and skilled nursing facilities.

Ms. Alsante frequently lectures for organizations such as the New York State Bar Association, Onondaga County Bar Association, Special Needs Alliance and Alzheimer's Association on topics including guardianships, supplemental needs trusts, estate planning, planning for the elderly and disabled, and estate and trust administration.

Ms. Alsante was instrumental in creating and establishing the Loretto Foundation Community Trust, a pooled supplemental needs trust, which benefits many seniors and disabled individuals in the community.

Ms. Alsante was named one of the "Top 25 Female Upstate New York Super Lawyers" for 2011 and 2013 and was selected as a *Best Lawyers in America* "Lawyer of the Year" in the area of "Litigation - Trusts and Estates", in Syracuse, NY, for 2015, 2017 and 2019.

M. ELIZABETH CORENO, ESQ. Biography

Libby Coreno is general counsel to Bonacio Construction, Inc., a real estate development and construction company in Saratoga Springs, New York. She also is the owner of The Law Offices of M. Elizabeth Coreno, Esq. PC where she provides consulting and legal services to clients seeking to select, develop, and finance real estate development projects. Libby prides herself on authenticity; her directness and honesty establishes an immediate bond of trust with clients. She brings an attitude of creative problem solving to land development challenges either in city hall or in court and she has the tenacity to see things through in the most complex, pressured regulatory scenarios. Her collaborative style pairs the art of persuasion with political poise and she assists her clients in achieving the approvals they need to keep real estate projects on track. The relationships she builds on this foundation increase in value to her clients over time. With years of development, construction, and real estate industry experience, Libby works alongside clients to craft persuasive messages, coupled with astute legal analysis, that demonstrate to decision makers and the public the positive impact of her clients' project. She seamlessly manages relationships among professionals, the press, and governing entities over any real estate development issue. From site selection to the approval process to public/private financing, Libby is well suited to provide comprehensive counsel for the entirety of a project's life-cycle and far beyond it. Libby also brings a personal passion to her daily engagements that changes conversations. In addition to her legal work, she is the founder of The Silent Partner™, a one-of-a-kind consultancy service that helps legal and business professionals learn ways to live, practice, and make life transitions mindfully, authentically, and creatively.

Libby is a 2003 *cum laude* graduate of Albany Law School and earned her undergraduate degree from the University of Kentucky. She is the 2016 recipient of the Saratoga County Women of Influence Award, past president of the Saratoga County Bar Association, and the NYSBA Attorney Wellbeing subcommittee Chair.

KATHRYN E. JERIAN

Biography

Kate Jerian is Deputy Executive Director and General Counsel for The Arc New York located in Latham, New York. She practices law in the areas of disability, guardianship, and non-profit corporations. Prior to her work at The Arc New York, Ms. Jerian worked for a number of years litigating toxic tort matters on behalf of injured children. She has worked extensively in the area of advising The Arc New York and its Chapters on a variety of legal matters involving 17-A guardianships, including counseling on a regular basis regarding the application of the law to matters of end-of-life decision-making for individuals with developmental disabilities, as well as other general matters. She is a member of the New York State Bar Association.

Ms. Jerian earned her J.D. in 2007 from Albany Law School, *magna cum laude*, and her B.A., *summa cum laude*, in 2000 from the University at Albany. She was the 2006 recipient of the Judge Bernard S. Meyer Scholarship. She is admitted to practice in all New York State Courts and the United States District Court for the Northern District of New York.

HONORABLE 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.

ELLYN S. KRAVITZ, ESQ.

Biography

Ellyn S. Kravitz is a partner at Abrams, Fensterman, Fensterman, Eisman, Formato, Ferrara, Wolf & Carone, LLP. She concentrates her practice in elder law, special needs planning, estate planning, estate administration, guardianship, and veterans' benefits. Ellyn is an authority on issues affecting adults and children with disabilities, and our senior population.

Ellyn holds the designation of a Certified Elder Law Attorney (CELA), awarded by the National Elder Law Foundation as accredited by the American Bar Association. Ellyn is also accredited by the U.S. Department of Veterans Affairs to present and prosecute claims for veterans' benefits.

Ellyn has been designated a Super Lawyer by the Thomson-Reuters Company since 2009, a distinction earned by only 5% of the attorneys in the New York Metro area. She was also included in the list of Top Women Attorneys in the New York Metro Area since 2012 in the New York Times Magazine. Further, she was selected by her peers for inclusion in the past six editions of The Best Lawyers in America® in the practice area of elder law.

Ellyn is an active member of the New York State Bar Association where she is an active member of both the Elder Law and Special Needs Section and Trusts and Estate Sections. She is member of the Executive Committee of the Elder Law Section and serves as the current Co-Vice Chair of the Guardianship Committee. Ellyn is also a member of the Executive Committee of the Trusts and Estates section and is a Co-Vice Chair of its Elderly and Disabled Committee.

Ellyn is a member of the National Academy of Elder Law Attorneys (NAELA) and the New York State Chapter of NAELA where she is a board member. She was a former member of the Board of the Estate Planning Council of New York City, Inc.

She is a frequent presenter to both consumer and professional groups and has provided input to state and national programs addressing legal, financial and other related matters involving persons with disabilities and our senior population.

Ellyn received her Juris Doctor degree from the New England School of Law and her LL.M. in estate planning from the University of Miami. She received her undergraduate degree from the University of Michigan.

HOWARD S. KROOKS, ESQ. Biography

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) from 2013 to 2014, the past president of the New York chapter of NAELA and serves on the Executive Council of the Florida Bar Elder Law Section as the NAELA Liaison. He currently serves on the Steering Committee for the 2019 NAELA Summit, on the Board of Trustees of the NAELA Foundation, as co-chair of the NAELA State Chapters Committee and as co-chair of the 2020 NAELA Annual Meeting. He is a past chair of the Elder Law Section of the New York State Bar Association from 2004-2005, and serves on the Executive Committee as past chair. He also is the current treasurer of the Florida Bar Elder Law Section. He has been consistently selected as a Florida Super Lawyer and a New York Super Lawyer, named a Top 25 Westchester County Attorney, has a 10.0 (Excellent) rating from AVVO and is AV Preeminent® rated by Martindale-Hubbell, a testament to the fact that Mr. Krooks' peers rank him at the highest level of professional excellence.

Mr. Krooks received the 2006 Outstanding Achievement Award from the NY Chapter of NAELA 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. 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 Barron's, NAELA, Stetson Special Needs Conference, ALI-ABA, WealthCounsel, ElderCounsel, the National Guardianship Association, the Florida Bar Association, the Academy of Florida Elder Law Attorneys, the NYSBA, the Alaska Bar Association, the Michigan Bar Association, the North Carolina Bar Association, the Pennsylvania Bar Association, the Utah Bar Association, the Washington Bar Association, the Texas Chapter of NAELA, the Association of the Bar of the City of New York, UJA Federation, the Brooklyn Bar Association, the Nassau County Bar Association, the Richmond County Bar Association, the Suffolk County Bar Association, the Westchester County Bar Association, the Hudson Valley Estate Planning Council, 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.

HONORABLE RICHARD KUPFERMAN

Biography

Richard Kupferman was elected Surrogate, Saratoga County in 2011 and was appointed Acting Supreme Court Justice in 2014.

From 1988 to 2010, he was an Assistant County Attorney for Saratoga County.

He was counsel to the New York State Senate Committee for Children and Families from 2000 to 2010.

He also operated a general private practice from 1988 to 2011.

Additionally, he served as an attorney for several municipalities, including, the towns of Galway, Edinburg, Northumberland, and the Village of Ballston Spa.

Richard Kupferman earned his bachelor's degree from SUNY Albany and his juris doctor from Albany Law School in 1987.

RON M. LANDSMAN, ESQ.

Biography

Ron M. Landsman is the principal attorney of the Landsman Law Group, with offices in Rockville, Maryland, and a satellite office in Frederick, Maryland. He practices elder law, special needs planning, estate and trusts, and guardianship.

Ron is the co-founder, past president, and long-time board member of First Maryland Disability Trust, Inc., the leading Maryland-based pooled special needs trust. He also drafted and is a former board member and now counsel for the Wesley Vinner Memorial Trust, operated by Shared Horizons, Inc., the leading D.C.-based pooled special needs trust. He received Shared Horizons' Humanitarian Award in 2016.

He is a member of the Special Needs Alliance (SNA) and chairman of its amicus committee. SNA is an invitation-only, national network of attorneys dedicated to the practice of special needs trusts and public benefits law.

He is a founding member, former long-time board member, and Fellow of the National Academy of Elder Law Attorneys; he is also chairman of its litigation committee. He served on the editorial board of the NAELA JOURNAL and received its John S. Regan Writing Award for *When Worlds Collide* in 2015. He received the NABLA Maryland-D.C. Chapter Member of the Year Award in 2010 and Outstanding Achievement Award in 2005.

He has written on special needs trust and Medicaid issues, and regularly presents training programs for lawyers, for the D.C. and Maryland Bars and the Stetson University annual trust program, and is presenting an independent three-day training program for lawyers, *Medicaid Mastery*, in fall, 2019. He has represented NABLA or the SNA as amicus in the First, Third, Fourth, Sixth, Eighth and Tenth Circuits, U.S. Courts of Appeal, and in the supreme courts of Maryland, Massachusetts, Michigan, Iowa, and Montana.

His hobbies are Abraham Lincoln and decidedly amateur woodworking.

CHRISTOPHER R. LYONS, ESQ.

Biography

Chris is the Executive Director of AIM Services, Inc., a large nonprofit Agency based in Saratoga Springs NY that supports individuals with Developmental disabilities and traumatic brain injury. Chris previously served as AIM's Senior Director and Counsel, a position he occupied for five years. Prior thereto, Mr. Lyons was a seasoned trial attorney for more than 25 years, having successfully litigated cases in jurisdictions throughout the U.S., with a breadth of experience which includes a concentration in the human services arena.

Just before coming to AIM, Mr. Lyons was a principal in the established law firm of Towne Ryan & Partners, P.C. His experience includes service with the General Counsel of New York State's former Office of Mental Retardation/Developmental Disabilities and as National Counsel for CNA Insurance's Human Services Program.

As a result of his extensive litigation background in Human Services, Chris has been asked to give numerous key note speeches, presentations and training seminars across the country to various human services organizations, associations and governmental agencies, focusing on recognizing and implementing unique defense strategies for supporting independence for individuals with disabilities and reducing claims against service providers. Mr. Lyons has authored several articles on an individual's Right to Risk, provider liability and the applicable standards of care in the Human Services industry.

JUNE MACCLELLAND

Biography

June MacClelland has served as the Senior Director and Chief Compliance Officer at AIM Services since January 1, 2018. June decided to retire from the Executive Director position at AIM Services, Inc. that she held since November 2008. June is still very actively supporting AIM Service, Inc. and works directly with their Executive Director, Christopher Lyons, Esq.

AIM Services, Inc. is a not-for-profit agency dedicated to supporting the “power of potential” in people of diverse abilities. Through community based services, advocacy, and education, dedicated professionals focus on supporting people in achieving their personal goals, while promoting a sense of self-confidence and independence.

June served on the Board of Directors for AIM Services, Inc. for approximately 10 years and held the position of President for several years. June has a personal passion for the provision of services for individuals with developmental challenges and traumatic brain injured persons. June has adopted two children with Down’s syndrome, one of whom is also on the Autism Spectrum and lives in a group home in Gloversville.

June has a lengthy history in health care. She worked for Glens Falls Hospital for 33 years in a number of progressive positions. When she left the hospital to join AIM, she was the Operations Manager for Adirondack Medical Services overseeing 15 physician practices and more than 250 employees, Budget, Quality Assurance, Joint Commission Preparedness, etc. Prior to that position June spent 7 years as the Compliance Manager, responsible for all internal audits and investigations. June was the Data Quality Coordinator from 1992 – 2001 overseeing all hospital databases, Inpatient, Outpatient and physician coding practices and all NYS and CMS regulatory reporting. Prior to these management positions, she was a direct care provider, working on the nursing units with patients.

June graduated from Warrensburg High School in 1975. She attended Albany Medical College of Nursing 1976 – 1978 and transferred to the American Health Information Management Association (AHIMA) in 1978 where she earned her diploma in Health Information Management. June received her National Certification as a Registered Health Information Technician and credentials as a Certified Coding

Specialist; credentials which she still maintains. June also received 140 credit hours in Health Care Administration and Leadership through the Glens Falls Hospital School of Leadership. June earned her Associates in Science from Excelsior College in Albany, NY.

June has a love of music, theater and travel, especially Disney and thoroughly enjoys her daughter, her pets, family and friends.

RICHARD A. MARCHESE, JR., ESQ.

Biography

Richard A. Marchese is a partner of Woods Oviatt Gilman LLP in Rochester, New York. He is co-chair of the firm's Elder Law and Health Care Practice Group responsible for handling all elder law and health care issues. He concentrates his practice in the areas of long term care and Estate planning, Social Security, Medicare and Medicaid eligibility, long term disability, estate 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 counsel to the Monroe County, N.Y. Department of Human Services, advising the Chronic Care, Home Care and Adult Protective units at that agency. He was a co-director of the Monroe County Provider Fund, Waste and Abuse Demonstration Project, and he now represents Medicaid providers in matters of compliance with government regulations and defense against government audits.

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

Mr. Marchese is a member of the Monroe County and New York State Bar Associations and is president-elect of the New York Chapter of the National Academy of Elder Law Attorneys, Inc. (NYNAELA). He is also a member of the Executive Committee of the Elder Law Section of the New York State Bar Association and a member of the Estate Planning Council of Rochester. Mr. Marchese is a frequent lecturer before both the New York State and Monroe County Bar Associations.

ROBERT P. MASCALI, ESQ.

Biography

Robert Mascali is senior consultant with the Center for Special Needs Trust Administration, Inc. which is a national nonprofit organization that administers special needs trusts and Medicare Set Aside Arrangements throughout the United States. In addition, Mr. Mascali is “of counsel” with the Bourget Law Group in Falmouth, Massachusetts and with the firm of Pierro, Conner and Associates, LLC with offices in Manhattan and in Latham, New York. In his private law practice he concentrates in the areas of Special Needs Planning for persons with disabilities and their families and care givers, Long-Term Care Planning, and Estate Planning and is admitted to practice in both Massachusetts and New York. He previously served as Counsel to NYSARC Trust Services and was Deputy Counsel and Managing Attorney at NYS OMRDD (Now OPWDD). Mr. Mascali is a member of the New York State Bar Association and its Elder Law and Special Needs Section and serves on the Executive Committee. He is also a member of Massachusetts NAELA and NY NAELA and is the Past President of the New York Chapter of NAELA.

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.

MATTHEW J. NOLFO, ESQ.

Biography

Matthew J. Nolfo is the principal of the Matthew J. Nolfo & Associates. Matt specializes in the areas of Estate Planning and Elder Law. He practices in New York and New Jersey. Matt has served as co-chair for the Legislation Committee of the NYS Bar Association's Elder Law and Special Needs Committee and is the Chair Elect of the Section. Matt is a Past Chair of the Committee on the Problems of the Aging at the Association of the Bar of the City of New York. Matt has chaired and lectured at various symposiums on Estate Planning and Elder Law issues at the Association of the Bar of the City of New York, the New York State Bar Association, the New York County Lawyer's Association, the Jewish Lawyer's Guild, the Metropolitan Women's Bar Association, the Columbian Lawyer's Association, the Suffolk County Bar Association, the National Kidney Foundation, the Archdiocese of New York The Practicing Law Institute, as well as various other civic and community organizations. Mr. Nolfo also served as an adjunct professor at New York University's School of Continuing Education and Professional Studies where he taught courses in Estate Planning and Asset Protection Planning.

PAUL M. RYTHER

Biography

Paul Ryther's solo practice in East Bloomfield, New York, focuses on elder law, planning for individuals with disabilities, trusts and estate planning and administration, and representation of Social Security benefits claimants. A graduate of Cornell University (BA 1971) and Case Western Reserve University (JD 1974), he began his career advocating for Medicaid and welfare recipients and quickly became one of the relatively few lawyers representing claimants for disability benefits under the new SSI program. After leaving employment with legal services organizations in 1986 and beginning to take up estate planning and administration matters, he found his experience aptly suited to the burgeoning field of elder law. Paul has lectured at various continuing legal education seminars, addressing issues in the fields of Medicare, Medicaid, supplemental needs trusts, guardianship and disability benefits advocacy. He is a member of the Elder Law section and of the Trusts and Estates section of the New York State Bar Association of NYSBA. His pro bono activities include assistance statewide to legal services advocates in disability benefits and Medicaid advocacy. Among other community activities, Paul has volunteered since 1997 at his local public broadcasting affiliate, where he currently is a member of the Volunteer Leadership Council.

HONORABLE BRANDON R. SALL

Biography

Surrogate Sall graduated from the University of Miami in 1982, and thereafter from the Benjamin N. Cardozo School of Law in 1985. From October 2014 until he became Surrogate in June 2015, Judge Sall was formerly the managing member of the White Plains law firm of Sall, Geist, Schwarz & Jellinek, PLLC. Prior to that, Judge Sall was a partner in Sall & Geist from 2012 to 2014. Prior to the formation of Sall and Geist in January 2012, Judge Sall was a partner in Schuman & Sall from 1992 to 2002 and of counsel to the Yonkers law firm of Rabin, Panero and Schuman from November 1988 to July 1992. Additionally, until June 2015 Judge Sall was a partner in the White Plains law firm, Gellert & Rodner, which specialized in tax certiorari matters.

Judge Sall specialized in trusts and estates and real estate law and had a significant transactional and litigation practice. In 2002, Judge Sall became general counsel to the Westchester County Public Administrator and served until June 2015

In May of 2015, Judge Sall was appointed as Surrogate of Westchester County by the Hon. Andrew M. Cuomo, Governor of the State of New York and was elected as Surrogate of Westchester County in November 2015.

Judge Sall is a member of the New York State Bar Association and the Westchester County Bar Association as well as the Trusts and Estates sections of the New York State Bar Association and Westchester County Bar Association.

JOANNE SEMINARA, ESQ.

Biography

Joanne Seminara has been an attorney licensed to practice law in New York and New Jersey for over 3 decades. Joanne is a member of the elder law firm of Grimaldi & Yeung LLP with offices located at 9201 Fourth Avenue in Bay Ridge, Brooklyn and 546 Fifth Avenue, New York, New York.

Joanne practices in the areas of elder law, estate and trust planning, including estate tax and Medicaid planning, and special needs planning. An attorney known for her thoroughness, tenacity and compassion, Joanne's legal experience includes other practice areas, including residential and commercial real estate, corporate law, employment law and land use and zoning matters.

Passionate public speaking, organizing and community service has been and remains an important part of Joanne's life. She regularly speaks at community education seminars on estate, trust and tax matters. In 2015, together with Judith Grimaldi, Esq., Joanne authored her first book entitled: *Five @ Fifty-Five; Five Essential Legal Documents You Need by Age 55*, as part of a public education campaign that highlights the critical importance of having 5 legal documents in place by mid-life. Her various television appearances include the 6 PM News on Fox 5 New York, Brooklyn Savvy, NY1, Good Day New York and WPIX Channel 11 News.

Joanne Seminara has received numerous awards and recognitions, among them: 2017 Bay Ridge Third Avenue Merchant's Civic Award, named Outstanding Woman in Business and Community Leadership by NIA Community Services Network, 2017; 2016 Power Women in Business Award from Home Reporter & Spectator News; 2016 Community Service and Law Award from the Brooklyn Real Estate Board; 2014 Winner of New York City Council Women's Community Service Award; 2012 Winner of Top Women in Business Award from Home Reporter & Spectator News; 30th Anniversary Service Award from the Union Center for Women, Service Award from the Golden Flame Society of St. Rosalia-Regina Pacis Church, and Community Service Award from the Guild for Exceptional Children, Inc.

Joanne is a member of several bar associations including the NYS Bar Association (NYSBA) acting as Ethics Committee Co-Chair and vice-Chair of the Publications Committee for NYSBA's Elder Law and Special Needs Section.

A member of Community Board 10 for over 2 decades, Joanne served as Chair of the Board from 2010 to 2013. A volunteer member of community organizations for many years, Joanne is past President and member of her local chapter of Business Networking International and the elected Democratic State Committeewoman and Executive Committee member of the Brooklyn Democratic Party.

A life-long Bay Ridge, Brooklyn resident, Joanne enjoys traveling, reading and spending time with her grandchildren.

NEAL A. WINSTON, ESQ.

Biography

Neal A. Winston is the principal of Winston Law Group, LLC, a law firm specializing in special needs counseling, estate and disability planning, probate, guardianships and conservatorships, and estate and trust administration. He serves as professional Trustee for special needs trusts. Practicing public benefits law for over 40 years, in 1975, Mr. Winston wrote the first edition of the Social Security Manual for the Community Worker. A nationally recognized expert on Special Needs Trusts and needs-based public benefit programs, he is frequently requested to lecture and train other attorneys and professionals that work in this field. An active client-oriented attorney, he has represented hundreds of claimants before state and federal courts and agencies. He has also been named a Super Lawyer in Boston Magazine since 2006 and is AV Preeminent rated by his peers for Martindale-Hubbell.

Mr. Winston is past president of the Special Needs Alliance (SNA), a national, nonprofit organization composed of attorneys who advise and represent individuals and their families to create and administer Special Needs Trusts. He is a member of the National Academy of Elder Law Attorneys (NAELA) and has been certified as an Elder Law Attorney by the National Elder Law Foundation. He is past president of the Massachusetts Chapter of NAELA, and serves on the public policy committee of both the state and national organizations. He is also a member of the National Organization of Social Security Claimants' Representatives and the American Bar Association Social Security Committee.

Mr. Winston is a member of the Massachusetts Academy of Trial Attorneys and the American Association of Justice. Additionally, he is active in legislative and public policy issues affecting disabled and elder citizens on a state and federal level, and is currently representing the SNA on the advocacy group that meets with the Social Security Administration to review Supplemental Security Income special needs trust policy. He currently serves on the Massachusetts Joint Bar Committee for Judicial Nominations.

He is a graduate of Utica College of Syracuse University and received his Juris Doctor degree at Suffolk University Law School. He is also a founder and president of the Belmont Land Trust.

EDWARD V. WILCENSKI, ESQ.

Biography

Edward V. Wilcenski, Esq., is a co-owner and co-manager of the law firm of Wilcenski & Pleat PLLC, with offices in Clifton Park and Queensbury, New York. He practices in the areas of Elder Law, Special Needs Planning, and Trust and Estate Planning.

Ed is a Trustee of the NYSARC Pooled Trust, and serves as a Trustee of the Wildwood Programs Pooled Trust, a trust program serving individuals with developmental and learning disabilities. In 2009 and again in 2013, he received the Marie Ivancich Memorial Award from the Brain Injury Association of New York State for professional commitment to the organization's mission of advocacy for individuals living with brain injuries.

He is a member and former President of the Special Needs Alliance, www.specialneedsalliance.org, an invitation-only, national network of attorneys dedicated to the practice of special needs trusts and public benefits law. The Alliance provides support for individuals with disabilities and their families, for attorneys involved in personal injury and medical malpractice litigation, and for trustees of special needs trusts.

Ed is a member of the National Academy of Elder Law Attorneys, and the New York State Bar Association's Elder Law and Special Needs Law Section. In 2019, Ed was recognized by the New York State Bar Association Elder and Special Needs Law Section for his involvement in litigation which has advanced the rights of individuals with disabilities.

Ed is a contributing author to various publications of the New York State Bar Association, including Representing People with Disabilities, and Planning for Incapacity, and Guardianship Practice in New York State. He lectures frequently to attorneys and other professionals on special needs trusts and estate planning for individuals and their families.