Anne C. Bederka, Esq.

Anne C. Bederka is a member of Greenfield Stein & Senior, LLP. The focus of her practice is trusts and estates litigation and Surrogate's Court matters. Anne represents both fiduciaries and beneficiaries in a wide range of contested matters, including will and trust proceedings, accounting proceedings, construction and reformation proceedings, proceedings for advice and direction, and proceedings for revocation of letters.

Anne previously served as Principal Law Clerk to Honorable Kristin Booth Glen in the New York County Surrogate's Court. She was a co-author of Harris 6th Edition New York Estates: Probate, Administration and Litigation (2013-2016) and has been a recurring panelist for the New York State Bar Association's certified training program, "What You Need to Know as a Guardian ad Litem." Anne has written and lectured on many topics, including will and trust contests, evidentiary issues in trusts and estates litigation, fiduciary best practices, and ethical issues for trusts and estates attorneys. Anne has served as a court-appointed discovery referee and as guardian ad litem in Surrogate's Court matters, both contested and uncontested. She has been a recurring guest lecturer on trusts and estates litigation at Cornell Law School, Fordham Law School, and CUNY Law School.

Timothy B. Borchers

Timothy B. Borchers *is a partner in the Greater Boston firm of Borchers Trust Group, P.C. and the creator of the Inheritance Trust™ and other trademarked estate planning and settlement techniques, including the Heirloom Ownership Trust™. He practices in the fields of estate and tax planning, real estate, asset protection, trust and estate settlement, and serves in trustee capacities. Tim holds the Estate Planning Law Specialist™* and Accredited Estate Planner®** (EPLS™, AEP®) designations. He is the creator of the Heirloom Ownership Trust™ tool kit for attorneys and a co-creator of www.SecondHomeSavvy.com. He speaks frequently on the topic of second home succession planning and teaches estate planning for bar, CPA and trade organizations. He was awarded the Going Green Award by the Massachusetts Bar Association for innovation in "greening" the practice of law. He is licensed in Massachusetts and New Hampshire, a member of WealthCounsel™ LLC, and has twice been president of the Massachusetts Forum of Estate Planning Attorneys. Tim earned his law degree from Boston College School of Law, where he was Case Editor of the UCC Reporter Digest, and his undergrad from Bowdoin College,* summa cum laude*, and is an accomplished classical tenor. Tim grew up spending summer weeks at Sandy Pond near Pulaski, NY. He and his wife Ruth started their own tradition on Lake Winnipesauke in NH. Reach him at tim@borcherslaw.com. (*Certified by the Estate Law Specialist Board, Inc., an American Bar Association-accredited certification. **Accredited by the National Association of Estate Planners & Councils.)*

***Christopher A. Cahill** is a Partner in Twelve Points Wealth Management in Concord, Mass. and Principal of the Twelve Points Family Office division, which provides concierge services for high net worth individuals. He has a concentration in financial plans for lawyers and law firms. Prior to financial services, Chris practiced in the field of estate planning. Chris is a lawyer, Certified Financial Planner® (CFP®), and a Chartered Advisor in Philanthropy® who has spent over 20 years helping wealthy families develop and implement complex and coordinated estate, financial and philanthropic plans. He holds a degree in Finance and Management from Northeastern University and a J.D. from Massachusetts School of Law. Chris is a co-creator of www.SecondHomeSavvy.com and can be reached at Chis@twelvepointswealth.com.*

Quincy Cotton

Quincy Cotton works with high net worth individuals and principals of closely held businesses to develop succession and estate plans that identify and address the challenging issues necessary to achieve overall family, business and tax goals. She works with families and family enterprises that hold a wide variety of business and investment assets, structuring insurance trusts, dynasty trusts, defective grantor trusts, grantor retained annuity trusts, qualified personal residence trusts and charitable trusts. Her understanding of the income tax aspects of partnerships and LLCs enables her to employ sophisticated planning techniques involving the use of family limited partnerships and entity freezes. She has helped clients create private foundations, establish scholarship programs, and structure gifting to achieve income, gift and estate planning goals. She counsels clients regarding pre-nuptial agreements, life insurance proposals, special planning for generation-skipping transfers, and post-mortem planning, including tax elections and disclaimers. In connection with estate planning and administration, she has advised clients regarding estate tax deferral for estates with significant closely held business interests. She has also counseled non-U.S. individuals present in the United States, as well as U.S. citizens on assignment abroad on income, gift, and estate tax planning related to changes in residence or citizenship. She received a B.A. magna cum laude from Boston University and her J.D. magna cum laude from the State University of New York at Buffalo.

LEVENE GOULDIN &THOMPSON, LLP
A T T O R N E Y S   A T   L A W
450 PLAZA DRIVE, VESTAL, NY 13850
607-763-9200
AKUKOL@LGTLEGAL.COM

Albert B. Kukol

Albert B. Kukol is Assistant Managing Partner in the law firm of Levene Gouldin & Thompson, LLP, Binghamton, NY. His areas of practice include elder law, trusts and estates and real estate. He was admitted to the NYS Bar in 1991. He is a graduate of Albany Law School (J.D.), Binghamton University (M.B.A.), and William and Mary (A.B.). Prior to becoming an attorney, he was Manager of Budgeting and Cost Accounting for United Health Services, Inc., Binghamton, NY.

He has been selected for inclusion in “The Best Lawyers in America® in Elder Law and recognized as a Super Lawyer again in the area of Elder Law. He is a Certified Financial Planner (CFP®). He is a member of the National Academy of Elder Law Attorneys, the Academy of Special Needs Planners, the Broome County Bar Association, the NYS Bar Association (Elder Law Section and the Trust and Estate Section) and the Financial Planning Association. He is a member of the Board of Directors of the regional Financial Planning Association.

He has been a speaker at numerous community presentations and at continuing legal education for members of the Bar. These include both local bar and New York State Bar Continuing Legal Education programs for the Elder Law and Trust and Estate Sections, such as Advanced Institutes for the Elder Law Practitioner (Homestead Transfers; Nursing Home Admissions; Supplemental Needs Trusts and Medicaid Liens), as well as on Elder Law, Medicaid Eligibility, Real Estate, Supplemental Needs Trusts, Charitable Trusts, Life Estates and Oil and Gas Tax Planning.

FARRELLFRITZ P.C.
BECAUSE SUCCESS MATTERS.

Joseph T. La Ferlita

Trusts & Estates

Partner | 516-227-0714 | jlaferlita@farrellfritz.com

LOCATION: Uniondale

Joseph T. La Ferlita is partner to the firm concentrating his practice in trusts and estates law, with an emphasis on estate planning, estate and trust administration, and tax controversy. He counsels individual planning clients, beneficiaries, individual and corporate fiduciaries, and not-for-profit entities, including public charities and private foundations, in connection with a multitude of estate and trust-related matters. These include, among others, the drafting of wills and trusts, estate tax and generation skipping tax planning, audits of estate tax returns and income tax returns, the formation of not-for-profit entities, obtaining Private Letter Rulings from the Internal Revenue Service, probate proceedings, administration proceedings, judicial accounting proceedings, judicial proceedings for advice and direction on behalf of executors and trustees, spousal elective share proceedings, and proceedings for the construction and reformation of wills and trusts. He represents clients in the Surrogates Court and the United States Tax Court.

Mr. La Ferlita is admitted to practice in the State of New York, the Commonwealth of Massachusetts and the United States Tax Court. He is a member of the American and New York State Bar Associations.

Mr. La Ferlita is especially active in the Trusts and Estates Law Section of the New York State Bar Association, where he serves as District Representative for Nassau and Suffolk Counties, Chairman of the Surrogates Court Committee and Member of the Estate and Trust Administration Committee. He plays a key role in drafting proposals for new and amended estate-related New York statutes, some of which ultimately have been signed into law by the Governor of New York State.

In 2002, Mr. La Ferlita was a Judicial Intern to the Honorable Thomas C. Platt of the United States District Court, EDNY.

Mr. La Ferlita has had two LexisNexis Expert Commentaries published on Lexis.com. The first is entitled, “Whether the Distinction Between Construction and Reformation Proceeding in New York Surrogate Courts Still Exists.” The second is entitled, ” The Fundamentals of the Separate Share Rule.” He has also published articles regarding Trust Decanting in New York and New York Trust Law in the NYSBA ***Trusts and Estates Law Section Newsletter,*** the The American Bar Association's ***Property & Probate***, and The Suffolk Lawyer.

Mr. La Ferlita was selected for the *Super Lawyers New York Metro Rising Stars* (Estate & Probate) list in 2013 and 2014.

In May 2011, Mr. La Ferlita received an LL.M. degree in taxation from New York University School of Law. He received his Juris Doctor degree, Dean’s List, from St. John’s University School of Law in 2004, where he served as a member of the ***American Bankruptcy Institute Law Review***. Mr. La Ferlita earned his M.A. degree in Theology from Boston College in 1998 and his B.S. degree in Biology from Fairfield University in 1996.

Prior to attending law school, Mr. La Ferlita was a high school teacher for several years in the Boston area.

Office
Uniondale
400 RXR Plaza
Uniondale, NY 11556

Practice Areas
Trusts & Estates
Tax

Education
Boston College (MA)
Fairfield University (BS)
New York University School of Law (LL.M.)
St. John’s University School of Law (JD)

Ellen G. Makofsky, Esq.
Makofsky & Associates, P.C.

Makofsky & Associates, P.C.
600 Old Country Road • Garden City • NY 11530
Phone: 516.228.6522 • Fax: 516.228.6525
Email: Ellen@MakofskyLaw.com
Website: MakofskyLaw.com

ABOUT MAKOFSKY & ASSOCIATES, P.C.:

Ellen G. Makofsky has concentrated her practice in Elder Law and Trusts and Estates since 1991 and she handles matters related to: Long Term Care Planning; Estate Planning (Wills and Trusts); Probate and Estate Administration; Medicaid Planning and Applications; Tax Planning; Special Needs Planning; Guardianship Proceedings; Disability Planning; Powers of Attorney; and Advance Directives.

ABOUT ELLEN G. MAKOFSKY:

Certified Elder Law Attorney "CELA"
2018 -2009 SuperLawyer
2018-2014 Best Lawyer
2013-2011 Top 100 SuperLawyer
2010 Woman of Distinction
2015, 2013, 2012 and 2011 Top 50 Women SuperLawyer
Secretary of the New York State Bar Association-3 terms
Member of The House of Delegates of the New York State Bar Association 11 year term
Member of the Executive Committee of the New York State Bar Association 7 year term
Member of The New York Bar Foundation Board of Directors
Vice Chair of the Finance and Investment Committee of The New York Bar Foundation
Fellow of the New York Bar Foundation
Chair New York State Bar Association Task Force on Powers of Attorney
Served as President or Chair of the following organizations:

- National Academy of Elder Law Attorneys, New York Chapter
- The New York State Bar Association Elder Law and Special Needs Section
- Estate Planning Council of Nassau, Inc.
- New York State Bar Association Committee on Women in the Law
- Long Island Alzheimer's Foundation "LIAF" Legal Advisory Board
- Sun Council, Inc.
- Senior Umbrella Network of Nassau
- Senior Umbrella Network of Queens
- Gerontology Professionals of Long Island, Nassau Chapter

Received Awards from the following institutions:

- 2018 Best Law Long Island Elder Law Lawyer of the Year
- 2017 Lifetime Achievement Award – LI Business News
- National Academy of Elder Law Attorneys, Inc. ("NAELA")
- New York State Bar Association
- The Long Island Alzheimer's Foundation
- The Visiting Nurse Association of Long Island
- The Nassau County Bar Association
- 2013 Access to Justice Champion
- 2014 Top 50 Women –LI Business News

FRANCES M. PANTALEO, ESQ.

Frances M. Pantaleo is a partner at Bleakley Platt & Schmidt LLP, and the head of its Elder Law and Special Needs Planning groups. She handles a broad range of matters with a particular emphasis in the areas of elder law, estate planning, drafting wills and trusts, probate and administration of estates, guardianship proceedings under Article 81 of the Mental Hygiene Law and Article 17A of the Surrogate's Court Procedure Act, and drafting and administration of supplemental needs trusts.

Ms. Pantaleo is a Past-Chair of the Elder Law and Special Needs Section of the New York State Bar Association and a member of the National Academy of Elder Law Attorneys. She has previously served as Chair of the Elder Law Committees of the Westchester Women's Bar Association and the Westchester County Bar Association. Ms. Pantaleo has received an AV rating from the Martindale-Hubbell peer review, the highest rating available, for her legal skills and ethical standards.

Ms. Pantaleo received her J.D. from New York University Law School in 1979 and is a *summa cum laude* graduate of Brooklyn College, CUNY. Ms. Pantaleo has been recognized as both a "Best Lawyer" and a "Super Lawyer" in the area of Elder Law. In 2007, Ms. Pantaleo received a Partner in Justice Award in recognition of her outstanding pro bono assistance to Legal Services of the Hudson Valley. Ms. Pantaleo has served on the Board of the Hudson Valley/Rockland/Westchester Chapter of the Alzheimer's Association. She is a frequent lecturer on elder law and special needs planning for professional education programs for attorneys and financial professionals and to community organizations such as The Alzheimer's Association, AARP, UJA-Federation, The Pace Women's Justice Center, Westchester ARC and Senior Law Day programs offered by Westchester County Department of Senior Services and programs.

Hon. Stacy L. Pettit

Albany County Surrogate's Court
Albany County Courthouse, Chambers Rm. 118
16 Eagle Street, Albany, New York 12207

518.285.8585
spettit@nycourts.gov

PROFESSIONAL ADMISSIONS AND EDUCATION:

Admitted to practice law January 1985 in the State of New York and the US District Court for the Northern District of New York.

Albany Law School of Union University, Albany, NY, **J. D.** June 1984

Vassar College, Poughkeepsie, NY, **A.B. in English** May 1981

LEGAL AND JUDICIAL EMPLOYMENT:

Surrogate's Court Judge, Albany County Surrogate's Court, Albany, NY, January 1, 2015 – present
Preside over probate proceedings and will contests, administration of estates, lifetime trusts and testamentary trusts, adoptions of minors and adults, guardianships of minors and developmentally disabled persons, property guardianships, wrongful death proceedings, reformation of trusts and will construction proceedings, accountings of estates, trusts and powers of attorney. Implement mandatory e-filing and improved court management and case tracking to better serve court users. Published decisions: Matter of Conway, NYLJ 1202743988431 (Sur Ct, Albany County 2015) (Summary judgment denied, as issues of fact exist as to the decedent's testamentary capacity and undue influence); Matter of Cropsey, NYLJ 1202763437881 (Sur Ct, Albany County 2016) (Declining to probate will, where sole beneficiary of decedent's will was found in an earlier Article 81 guardianship proceeding to have unduly influenced decedent]); Matter of Falgiano, NYLJ 1202747182210 (Sur Ct, Albany County 2016) (Granting executor reargument, and adhering to prior decision limiting attorney-executor's statutory commissions); Matter of Donohue, NYLJ 1202769434205 (Sur Ct, Albany County 2016) (Respondent trust beneficiary lacks standing to object to parts of accounting unrelated to his outright interest); Matter of Benson, NYLJ, Aug. 8, 2017 at 31 (Sur Ct, Albany County 2017) (Administrator surcharged amount necessary to satisfy siblings' entitled-to share of estate); Matter of Walsh, NYLJ, Aug. 29, 2017 at 31 (Sur Ct, Albany County 2017) (Petition by decedent's brother for removal of administrator, who is decedent's ex-spouse and legal guardian of property of decedent's sole heir, denied); Matter of Marriott, NYLJ, Oct. 10, 2017 at 32 (Sur Ct, Albany County 2017) (Summary judgment granted appointing named executor, whom respondent alleged had dementia and lacked capacity to act); Matter of Cagino, NYLJ, Dec. 19, 2017 at 41 (Sur Ct, Albany County 2017) (Motion to transfer a Kings County partition action regarding decedent's estate's half interest in Brooklyn real property to this Court, in which decedent's contested probate proceeding was pending, denied); Matter of Baby Girl M., NYLJ, February 23, 2018 at 35 (Sur Ct, Albany County 2018) (After trial of this contested adoption proceeding, the court held that, while the child would have a home and be financially cared for by either side, petitioners' superior ability to provide emotional and intellectual development as mature young parents surrounded by supportive family, as well as the emotionally stable quality of their home environment, are the factors that show clear and convincing evidence that the best interests of the child would be served by completing the adoption of the child by petitioners); Matter of Tinsmon, __ Misc 3d __, 2018 NY Slip Op 28238 (2018) (Determining that trustees of a first party supplemental needs trust have discretion to purchase real property and determine whether or not the property should be titled to the beneficiary, in the name of the guardian of the beneficiary, or in the name of the trust, while taking into consideration the impact of such titling on the trust beneficiary's eligibility for means-tested benefits). Also serve as member of Albany County Jury Board, mentor judge to Ulster Surrogate, and preside over Albany and Rensselaer County in rem proceedings as Acting County Court Judge.

Principal Appellate Court Attorney, Supreme Court, Appellate Division, Third Department, Albany, NY, March 2012 – December 31, 2014
Assist the Court's Presiding and Associate Justices with decisions, determination of motions and orders to show cause, the Article 81 guardianship examiner program and the assigned counsel program.

Surrogate's Court Chief Clerk, **Albany County Surrogate's Court**, Albany, NY, Feb 2001 – March 2012
Perform legal review of pleadings filed with the court, conduct calendar appearance return dates, examinations of witnesses and court conferences, perform legal research and draft court decisions, orders and decrees. Supervise court personnel and assist court users and counsel in Surrogate's Court practice and procedure. Implement UCMS court database and manage court caseload, resources, court financial accounts, court budget, statistical reports and records management to provide efficient and timely service to all court users.

Law Clerk to Hon. Raymond Marinelli, Albany County Surrogate's Court, part-time Sept 1999 – Feb 2001
Research and draft court decisions, orders and decrees, conduct pre-trial and settlement conferences, and assist court personnel in various Surrogate's Court proceedings including probates, administrations, accountings, guardianships, adoptions and wrongful death compromises.

Examiner of Guardianships, Albany County Surrogate's Court, appointment Jan 1998 – Sept 1999
Court appointed by Hon. Raymond Marinelli to review annual property guardianship accountings and petitions for withdrawals of guardian funds, to prosecute compliance with accounting requirements of guardians of infants and persons under disability, and to pursue recovery of funds misused by guardians.

Partner, O'Connor & Pettit, Albany, NY, July 1993 – Feb 2001
Founding partner of private law firm, with concentration in estate and trust administration, Surrogate's Court practice and litigation, estate and tax planning, real property and elder law.

Associate, Zubres, D'Agostino, Hoblock & Greisler, P.C., Albany, NY, Dec 1989 – July 1993
Attorney in private practice of law, concentrating in estate and trust administration, Surrogate's Court practice and litigation, estate and tax planning.

Associate, Tabner & Laudato, Albany, NY, Nov 1987 – Dec 1989
Attorney in private practice of law, concentrating in estate and trust administration, Surrogate's Court practice and litigation, estate and tax planning.

Associate, Ainsworth, Sullivan, Tracy, Knauf, Warner, & Ruslander, Albany, NY, Sept 1984 – Nov 1987
Attorney (and law clerk prior to bar admission) in private general practice of law, concentrating in estate and trust planning and administration, Surrogate's Court practice, business and tax planning and real estate. Also practice and gain experience in civil litigation, family, contract and tort law.

PROFESSIONAL MEMBERSHIPS AND OFFICES:
New York State Surrogates' Association Member, Committee on Standards and Goals
Judicial Institute Curriculum Advisory Committee Member for NYS Office of Court Administration
New York State Bar Association, **Sustaining Member,** having served as:
- **DELEGATE to the New York State Bar Association House of Delegates**
- **CHAIR and VICE-CHAIR of the Surrogate's Court Committee** of Trusts and Estates (T&E) Section
- **EXECUTIVE MEMBER** of the T&E Section **as Member at Large**
- **EXECUTIVE MEMBER** of the T&E Section **as Third District Representative**

MEMBER of the T&E Section **Continuing Legal Education Committee**
MEMBER of the Judicial Section
Capital District Women's Bar Association Sustaining Member
Albany County Bar Association Sustaining Member
New York State Association of Chief Clerks of the Surrogate's Court, 2001 – 2012
Vice President, 2011 – 2012
Supreme Court, Appellate Division, Third Department, having served as:
MEMBER of the Continuing Legal Education Committee
CO-CHAIR of the Committee on Article 81 Guardianships
Office of Court Administration of the State of New York, having served as:
MEMBER of the Examination Committee for New York Surrogate's Courts
MEMBER of the Forms Committee for Surrogate's Courts
The New York Bar Foundation
FELLOW, Maryann Saccomando Freedman Circle
Supervising Judge of Trusts and Estates Fellowship recipients, Summers 2016 and 2018
Albany Law School
Supervising Judge for Law Student Interns in Surrogate's Court, 2015 to present

PUBLICATIONS AND PRESENTATIONS OF CONTINUING LEGAL EDUCATION AND PUBLIC SERVICE SEMINARS:

"SURROGATE'S COURT PROCEEDINGS AND ISSUES -- An Insider's View" – Published articles in monthly Albany County Bar Association Newsletter, coauthored with chief clerk and court attorney:

Commissions Payable on an Estate, July/August 2018
Ethics: Schneider v Finmann and Surrogate's Court Practice, June 2018
Hot off the press!! New Surrogate's Court Probate and Administration Petitions, May 2018
Nothing is Certain Except for Death and Taxes, April 2018
When a Fiduciary Dies Before the Estate or Trust is Closed, March 2018
Foreign Estates, February 2018
You are Necessary! (Proper parties to proceedings), January 2018
Digital Assets in the Digital Age, December 2017
I Have a Claim! (Claims against estates), November 2017
Was There a Gift, or Wasn't There? (Proof a gift was made by a decedent), October 2017
Adult Adoptions, July/August 2017
You DO Belong Here! -- Surrogate's Court Subject Matter Jurisdiction, June 2017
E-filing Protocols are Here! May 2017
Compromising a Wrongful Death Proceeding, April 2017
Children and Money: SCPA Article 17 Guardianships, March 2017
Real Property and Estate Administration: A Trap for the Unwary, February 2017
Should Your Client Contest Probate? Ask for 1404 Examinations! January 2017
Mandatory E-Filing Has Begun in Albany County Surrogate's Court, December 2016
The Substantive Law of Wills: Refresher, November 2016
A Spouse's Right to Estate Assets – The Right of Election, October 2016
Do Not Underestimate the Power of Exempt Property, July/August 2016
Probate Proceedings – Who, What, Where and How? June 2016
Intestate Administration – Who, What, Where and How? May 2016
Hot off the Press! New Surrogate's Court Forms and Rules, April 2016
You've Been Served – SCPA-Style! March 2016
Issues in Intestate Succession, February 2016
An Overview of Small Estates (SCPA Article 13), January 2016

Closing the Estate or Trust – Formal or Informal Accounting? December 2015
Renunciations and Disclaimers of Estate Interests, November 2015

"Administration and Probate Procedures and Pointers"
04/19/2018 – Speaker, writer for Albany County Bar Association CLE

"Guardian ad Litem Official Training: What You Need to Know as a Guardian ad Litem"
02/27/2018 – Speaker for NYSBA CLE

"A View from the Bench: Guardianship Issues and Challenges"
11/07/2017 – Speaker, panelist for 2017 ARC of New York Guardianship Training Symposium

"Surrogate's Court Subject Matter Jurisdiction"
10/24/2017 – Speaker, writer of seminar for OCA Surrogate's Court Clerks Associations

"Conducting SCPA 1404 Discovery"
09/25/2017 – Speaker at mock contested probate 1404 examination for NYSBA CLE

Office of Court Admin. 2017 Judicial Institute – "The Surrogate's Court Subject Matter Jurisdiction"
06/20/2017 and 07/25/2017 – Speaker, writer of seminar for NYS judges

Albany Law School Judicial Field Placement Seminar – "Surrogate's Court Litigation"
03/08/2017 – Presenter at Albany Law School (for Prof. Rachael Kretser)

"Beyond Uncontested Probate – Practicing in Surrogate's Court"
03/02/2017 – Speaker, writer for Albany County Bar Association CLE

"Guardian ad Litem Official Training: What You Need to Know as a Guardian ad Litem"
05/19/2016 – Speaker for NYSBA CLE

"Competent Estate Planning - What You Need to Know"
03/29/2016 – Speaker, writer for Albany County Bar Association CLE

"Guardianships of Developmentally Disabled Individuals and Special Needs Trusts"
01/26/2016 Speaker on panel of Surrogates for NYSBA Annual Meeting CLE

"Estate Planning and Will Drafting"
12/04/2015 – Speaker, co-chair and moderator for NYSBA CLE

"Ethics in Surrogate's Court Proceedings"
10/27/2015 - Speaker, writer for NYS OCA Surrogate's Court Clerks Association CLE

"Surrogate's Court Proceedings and Issues – An Insiders' View "
05/19/2015 – Speaker, writer for Appellate Div., Third Department in-house CLE

"Trust Me? To Bond or Not to Bond"
04/24/2015 – Writer, speaker on panel of Surrogates for NYSBA CLE

"Ethics in Surrogate's Court"
03/12/2015 – Speaker, writer for Schenectady County Bar Association CLE

"Probate and Administration of Estates"
12/12/2014 – Speaker, chair and moderator for NYSBA CLE

"Discovery Proceedings in Surrogate's Court"
05/29/2014 – Chair and moderator for NYSBA CLE

"An Introduction to Estate Planning"
10/30/2013 – Speaker, chair and moderator for NYSBA CLE

"Contested Accounting Proceedings in Surrogate's Court"
05/14/2013 – Speaker, chair and moderator for NYSBA CLE

"Estate Planning Basics"
04/2013 – Speaker, writer for Appellate Div., Third Department in-house CLE

"Uncommon Procedural Issues in Surrogate's Court" (annually 2002-2011), **"To Bond or Not to Bond," and "Complex Accounting Issues in Surrogate's Court"** - Speaker, writer for NYS OCA Surrogate's Court Clerks Association CLEs

"Estate Planning and Will Drafting"
10/19/2010 – Speaker for NYSBA CLE
"What You Need to Know as a Guardian ad Litem"
12/03/2008 – Chair and moderator for NYSBA CLE
"Probate and Administration of Estates"
10/23/2008 – Speaker for NYSBA CLE
"Inheritance In New York - Legal Issues affecting Estate Administration"
12/02/2007 – Speaker, writer for New York State Legislature in-house CLE
"Trust Your Planning: A Review of Trust Planning and Drafting Techniques"
05/16/2007 – Speaker, chair and moderator for NYSBA CLE
"Surrogate's Court Proceedings"
05/17/2006 – Speaker for NYSBA CLE
"Probate and Administration of Estates"
10/24/2006 – Speaker for NYSBA CLE
"Estate Planning and Will Drafting"
10/06/2005 – Speaker, co-chair and moderator for NYSBA CLE
"Estate Planning Basics"
05/25/2005 – Speaker, co-chair and moderator for NYSBA CLE
"Probate and Administration of Estates"
10/29/2004 – Speaker, chair and moderator for NYSBA CLE
"Settling an Estate"
05/17/2004 – Speaker, chair and moderator for NYSBA CLE
"Estate Planning and Will Drafting"
10/30/2003 – Speaker, chair and moderator for NYSBA CLE
"Estate Planning for the Middle-Class Client"
06/04/2003 – Speaker, co-chair and moderator for NYSBA CLE
"What You Need to Know as a Guardian ad Litem"
05/05/2003 – Chair and moderator for NYSBA CLE
"Estate Litigation"
11/04/2002 – Speaker for NYSBA CLE
"Probate and Administration of Estates"
10/30/2002 – Speaker, chair and moderator for NYSBA CLE
"Trust Planning and Taxation"
05/29/2002 – Speaker, chair and moderator for NYSBA CLE
"Estate Planning and Will Drafting"
10/16/2001 – Speaker for NYSBA CLE
"Income Taxation of Decedents, Their Estates, and Their Trusts"
05/15/2001 – Speaker for NYSBA CLE
"Probate and Administration of Estates"
09/28/2000 – Speaker for NYSBA CLE
"Surrogate's Court Proceedings"
05/10/2000 – Speaker for NYSBA CLE
"Estate Planning and Will Drafting"
11/16/1999 – Speaker for NYSBA CLE
"Settling an Estate"
05/21/1999 – Speaker for NYSBA CLE
"Probate and Administration of Estates"
10/22/1998 – Speaker for NYSBA CLE

"Lifetime Trusts, Estate and Gift Taxation"
05/28/1998 – Speaker for NYSBA CLE
"State May Retain More Retirees with New NY State Estate Tax Law" – Author, published in Capital District Business Review 11/24/1997
"Estate Planning and Will Drafting"
09/24/1997 – Speaker for NYSBA CLE
"Fiduciary Income Tax Planning"
05/22/1997 – Speaker for NYSBA CLE
"Probate and Administration of Estates"
09/25/1996 – Speaker for NYSBA CLE
"Estate Planning and Will Drafting"
05/23/1996 – Speaker for NYSBA CLE
"Estate Planning for Parents of Minor Children"
06/15/1995 – Public service information seminar at Bethlehem Preschool, Glenmont, NY
"Basic Inheritance Law and the Spousal Right of Election"
04/26/1995 – Speaker for NYS CLU/ChFC Association CLE
"Probate and Administration of Estates"
10/18/1994 – Speaker for NYSBA CLE
"Estate Planning and Will Drafting"
09/29/1994 – Speaker for NYSBA CLE
"Lifetime Trusts, Estate and Gift Taxation"
05/12/1994 – Speaker for NYSBA CLE
"Long-term Care Planning Options and Considerations" (Public service information seminars)
02/20/1997 – for International Assoc. for Financial Planning; 06/09/1994 – for Schenectady Parkinson's Disease Support Group; 04/27/1994 – for Albany Parkinson's Disease Support Group; and 06/23/1992 – for Joint Meeting of Parkinson's Disease Support Groups
"**Pre-retirement Estate and Trust Planning"**
1993 – 1998 for NYS Office for the Aging's conferences for New York State employees
"Business Tax Deductions"
5/23/1994 – Speaker for NYS Office for the Aging's conference for New York State employees
"Health Care Proxies and DNR Law"
03/16/1993 – Public service information seminar at St. Mary's Hospital
"Establishing Guardianships of Person and Property for Disabled Adults"
02/09/1993 – Public service information seminar at conference of Disability Service Providers
"Funding and Operating Living Trusts" – Author, published in "Planning Opportunities with Living Trusts in New York", copyright 1992, by National Business Institute, Inc.
Seminars on Probate, Living Trusts and Health Care Planning Documents for the Public
Public service information speaker at several annual Senior Citizens' Law Days and Health Care Planning Days, sponsored by Albany Law School

PERSONAL INFORMATION

Raised in Omaha, Nebraska, Stacy met her spouse while in college in the late 1970's, made New York a permanent home when she began law school in 1981, and she and her spouse successfully raised three adult sons in Albany County, New York while she worked full time as an attorney.