



Trusts & Estates
Law Section

Trusts & Estates Law Section 2025 Fall Meeting



**Thursday, September 25 -
Saturday, September 27, 2025**



The Sagamore Resort, Bolton Landing, New York

NYSBA.ORG

8.0

MCLE Credits



Program Chairs

Angelo M. Grasso, Esq., Greenfield Stein & Senior LLP, New York, NY

Meaghan T. Feenan, Esq., Program Co-Chair, Harris Beach Murtha, Albany, NY

Brooke S. Teich, Esq., Greenfield Stein & Senior, LLP, New York, NY

Section Officers

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Angelo M. Grasso, Esq., Greenfield Stein & Senior, LLP, New York, NY

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Program Description

This year's Trusts and Estates Law Section Fall Meeting—Family Matters: Litigation and Planning Considerations for the Modern Family—offers a dynamic two-day CLE program designed to explore the intersection of family relationships, estate planning, and litigation. Against the stunning backdrop of Lake George at The Sagamore Resort, our distinguished faculty will address complex issues facing today's trusts and estates practitioners, including planning for second marriages, business succession strategies, prenuptial and postnuptial agreements, legislative updates, and more.

8.0 MCLE Credits

This program is transitional and approved for MCLE credit in New York for all attorneys, including those newly admitted.

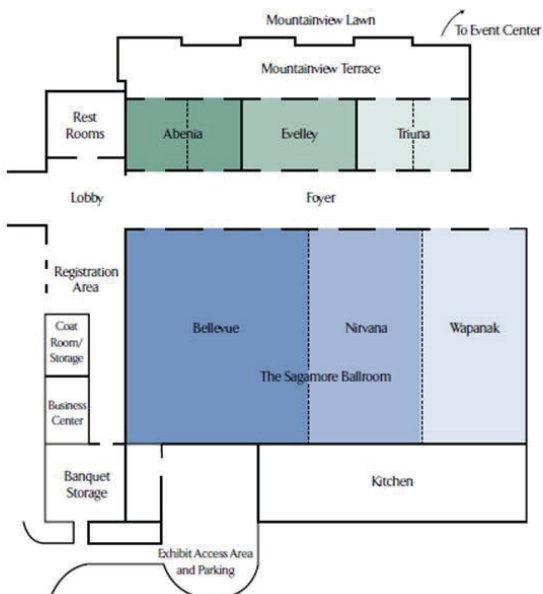
8.0 Total Credits: 8.0 in Areas of Professional Practice

The New York State Bar Association has been certified by the New York State Continuing Legal Education Board as an accredited provider of continuing legal education in the State of New York. For information about the CLE Rules, visit [NYCOURTS.GOV/ATTORNEYS/CLE](https://nycourts.gov/attorneys/cle)

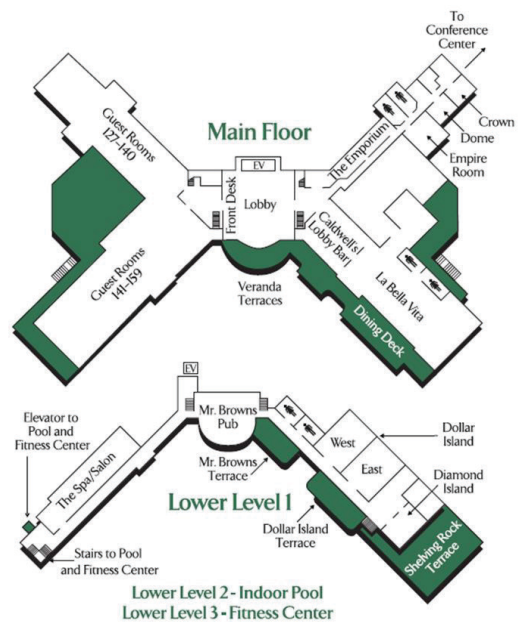
THE SAGAMORE RESORT MAPS



The Conference Center



The Main Hotel



Thursday, September 25

- 12:00 p.m. – 5:00 p.m. **Registration** - Conference Center Foyer
- 5:30 p.m. – 7:00 p.m. **Trusts & Estates Law Section Welcome Reception** | Shelving Rock Terrace

Friday, September 26

- 7:30 a.m. – 9:00 a.m. **Conference Registration and Breakfast** - Conference Center Foyer
Breakfast sponsored by Empire Valuation Consultants
- 9:00 a.m. – 9:10 a.m. **Trusts and Estates Law Section Welcome and Program Introduction**
Angelo M. Grasso, Esq., Section Chair, Greenfield Stein & Senior LLP, New York, NY
Meaghan T. Feenan, Esq., Program Co-Chair, Harris Beach Murtha, Albany, NY
Brooke S. Teich, Esq., Program Co-Chair, Greenfield Stein & Senior, LLP, New York, NY
- 9:10 a.m. – 10:00 a.m. **Here's the Story...Drafting Considerations for Second Marriages**
This presentation will explore key estate planning strategies for second marriages, focusing on estate tax considerations, asset titling, and the use of trusts to balance the needs of the surviving spouse with the desire to preserve assets for each spouse's children. Attendees will gain insights into navigating New York's right of election and structuring plans to ensure equitable asset distribution.
Panelists:
Kevin H. Cohen, Esq., Cohen Soloway & Wooldridge, P.C., White Plains, NY
Matthew J. Nolfo, Esq., Matthew Nolfo & Associates, New York, NY
1.0 Credit in Areas of Professional Practice
- 10:00 a.m. – 10:50 a.m. **Succession Planning with the Roys (Minus the Drama): Business Succession Planning – Practical Considerations**
This presentation will discuss questions to consider in the context of typical corporate agreements for purposes of the estate planning and tax impact of a planned or unplanned succession, along with an overview of the related valuation concepts. We will also explore when clients should consider a valuation and common pitfalls in succession planning.
Panelists:
Jennifer M. Boll, Esq., Harris Beach Murtha Cullina PLLC, Albany, NY
David Consigli, CPA, ABV, CDFA, FAZ Forensics
1.0 Credit in Areas of Professional Practice
- 10:50 a.m. – 11:05 a.m. **Coffee Break with Exhibitors - Conference Center Foyer**
- 11:05 a.m. – 11:55 a.m. **It's a Prenup Thing: Marriage Insurance, a/k/a, the Prenuptial Agreement**
This presentation will discuss who needs a prenuptial agreement (spoiler alert: everyone!) and provide general practice tips for approaching the prenuptial agreement, the benefits and limitations of a prenuptial agreement, avoiding pitfalls and costly mistakes which can potentially void an agreement, and the late prenuptial agreement (a/k/a, a postnuptial agreement).
Presenter:
J. Rochelle Cavanagh, Esq., Whiteman Osterman & Hanna LLP, Albany, NY
1.0 Credit in Areas of Professional Practice
- 11:55 a.m. – 12:45 p.m. **All in the (Legislative) Family: Legislative Update**
A review and discussion about recent updates to New York trusts and estate law, including legislation and proposals that Section members are actively working on.
Presenter:
David A. Bamdad, Esq., Meltzer Lippe Goldstein & Breitstone LLP, Mineola, NY
1.0 Credit in Areas of Professional Practice
- 12:45 p.m. **Remarks from NYSBA President-Elect, Taa Grays**
- 6:00 p.m. – 9:00 p.m. **Afternoon on Your Own**
Reception and Dinner on the Pool Terrace

Trusts and Estates Law Section Fall Meeting 2025

Saturday, September 27

7:30 a.m. – 9:00 a.m.	Conference Registration and Breakfast - Conference Center Foyer
8:00 a.m. - 8:45 a.m.	Committee Breakfast Meetings - Evelley The following committees have confirmed that they will be meeting during this time: <ul style="list-style-type: none">• Older Adults and Persons with Disabilities Committee• Estate Administration Committee• Practice and Ethics Committee
9:00 a.m. – 9:10 a.m.	Program Introductions
9:10 a.m. – 10:00 a.m.	Full House, Split Deed: Real Property Multi-Beneficiary Ownership Issues and the Uniform Partition of Heirs Property Act This session will explore the often-overlooked Uniform Partition of Heirs Property Act (UPHPA), which was enacted in New York in 2019. The law is designed to address the unique challenges of real estate inherited by multiple beneficiaries or distributees as tenants-in-common without a clear agreement on how to manage or divide the property. The session will also evaluate how the UPHPA aims to preserve family wealth by providing a framework that prioritizes due process and offers solutions to prevent forced sales of inherited property, especially benefiting vulnerable families who may lack resources to navigate complex legal processes. Panelists: Jill Choate Beier, Esq. , Norfolk Beier PLLC, Lake Placid, NY Robert M. Harper, Esq. , Farrell Fritz, P.C., Uniondale, NY <i>1.0 Credit in Areas of Professional Practice</i>
10:00 a.m. – 10:50 a.m.	Family Matters —Until You're Left Out: Litigation with Disinherited Relatives Believe it or not, some families do not get along. This presentation examines disinheritance, the family fallout that follows, and common issues in litigation brought by the disinherited. Panelists: Lisa Fenech, Esq. , Offit Kurman, New York, NY Michael D. Zahler, Esq. , Hodgson Russ LLP, Albany, NY <i>1.0 Credit in Areas of Professional Practice</i>
10:50 a.m. – 11:05 a.m.	Coffee Break with Exhibitors
11:05 a.m. – 11:55 a.m.	Leave It to the Spouse: Right of Election Litigation Highlights This presentation examines the spousal right of election and the litigation that can arise when its exercise is contested. The speakers will cover key issues such as calculating and enforcing the elective share, the impact of prenuptial and postnuptial waivers, and potential disqualification. Practical strategies for prosecuting and defending these claims will also be covered. Panelists: Michael Calcagni, Esq. , Morritt Hock & Hamroff, LP, New York, NY Ross Katz, Esq. , Schlesinger Lazetera & Auchincloss LLP, New York, NY <i>1.0 Credit in Areas of Professional Practice</i>
11:55 a.m. - 12:45 p.m.	Modern Family Feuds: Insights from the Surrogates This Surrogates Panel will examine the various ways familial relationships impact Surrogate's Court practice, including the question of whether a joint bank account, commonly held between family members, reflects a true joint tenancy with rights of survivorship or simply a convenience account, with the funds properly belonging to the estate of the deceased account holder. Panelists: Hon. Timothy P. McElduff, Jr. , Surrogate of Orange County Hon. Rosemarie Montalbano , Surrogate of Kings County Hon. Acea Mosey , Surrogate of Erie County Hon. Mary Keib Smith , Surrogate of Onondaga County Moderator : Emma K. Pletenycky, Esq. , Day Pitney LLP, New York, NY <i>1.0 Credit in Areas of Professional Practice</i>

12:45 p.m.

Adjourn – Closing Remarks

Angelo M. Grasso, Esq., Section Chair



PLACES TO VISIT | THE SAGAMORE RESORT

RESTAURANT DINING



Caldwell's



La Bella Vita Ristorante



Mr. Brown's Pub

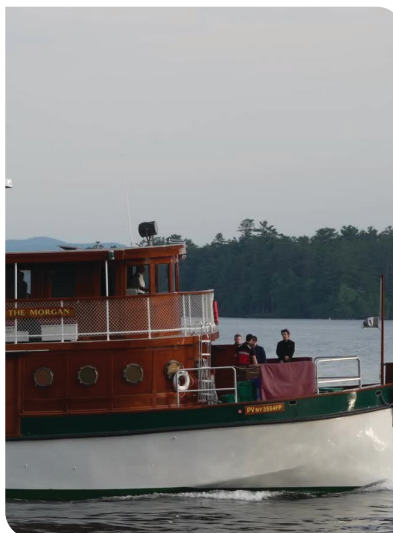


Club Grill Steakhouse

LAKE SIDE DINING



The Lakehouse



The Morgan



The Pavilion

PLACES TO VISIT | THE SAGAMORE RESORT

The Sagamore Signature Donald Ross Golf Course

Honored by Golf Magazine as one of its Silver Medal Resorts, the 18-hole Sagamore Golf Course commands stunning views of Lake George and was designed and built under Donald Ross's personal supervision in 1928. As part of a \$75 million restoration in 1985, this exceptional hillside course was fully restored in accordance with Ross's original blueprints.

In classic Ross fashion, The Sagamore Golf Course uses the natural environment to give each hole its challenge and beauty. The holes are routed naturally through an upland meadow and the Adirondack woods, where white birches enliven the evergreen forest. To accent the rolling mountainside terrain, Ross planted heather from his own native Scotland within the meadow. Lush fairways are narrow and lined with hardwoods, while deep bunkers surround undulating greens. The Sagamore par 70, championship course is located on the mainland and also features a practice range, professional instruction and a fully-stocked Pro Shop. Shuttle service is provided to and from the resort.

Golf Digest rated The Sagamore Golf Course as the "5th Best Public Course in New York State." Our legendary Lake George golf course has also been honored with the "Greens of Distinction" award from Corporate and Incentive Travel and named a "top U.S. resort course" by Condé Nast.



PLACES TO VISIT | THE SAGAMORE

ON-SITE RECREATIONAL OFFERINGS

- Spa and Salon - Fitness Center
- Indoor & Outdoor heated pools and Jacuzzis
- 18 Hole Donald Ross-designed golf course
- Outdoor Tennis Courts, sandy volleyball court, basketball court, horseshoes, croquet and playground
- Adirondack Bonfire areas
- Indoor Rec Center – Covered with more than 10,000 sq. ft. of indoor entertainment including mini-golf, a home run derby, basketball, Nintendo Wii and X-Box stations, foosball, pool table, lofted movie theater, board games, ping pong, rock climbing wall and Sagamore Kids Club
- Scavenger Hunt & Nature Walking Trail



OFF-SITE RECREATIONAL OFFERINGS

- Lake George Shoreline Cruises
- Nature Hikes / Walks: Lake George Kayak Company
- Horseback Riding / Winter Sleigh Rides : Circle B Ranch
- Shopping: Factory Outlets of Lake George / Amusement Park: Six Flags Great Escape
- Tubing and White Water Rafting: Sacandaga Outdoor Center
- Baseball: Town Field
- Biking Trails and Rentals
- Cross Country Skiing: Garnet Hill
- Gore Mountain - Gondola Rides, Mountain Biking, Adventure Village and Hiking
- Skiing, Snowboarding and Tubing: Gore Mountain
- Ice Skating: Lake George Forum
- Bowling: Lake George Bowl
- Historic Walking Tours of Lake George
- Lazy-River Tubing / Rafting / Downhill Winter Tubing: TUBBY TUBES
- Snowmobiling & Horseback Riding: Bennett's
- Brewery Tour & Beer Tasting – Davidson Brothers Brewing Company



THE NEW YORK STATE BAR ASSOCIATION

Annual MEETING '26

CELEBRATING

150 Years



Save the Date!

Trusts & Estates Law Section

Wednesday, January 14, 2026

8:30 a.m. – 12:00 p.m.

New York Hilton Midtown



NYSBA.ORG/AM2026



TRUSTS AND ESTATES LAW SECTION 2026 SPRING MEETING

Thursday, May 7 - Saturday, May 9, 2026

JW Marriott | Austin, TX

Save the Date

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NOTES

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NEW YORK STATE BAR ASSOCIATION
TRUSTS & ESTATES LAW SECTION

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Albany, NY 12207