

Elder Law & Special Needs Section Spring UnProgram 2026

Thursday, April 23rd & Friday, April 24th
NYSBA | 1 Elk Street | Albany, NY 12207
Agenda & Itinerary

Day 1: Thursday, April 23, 2026

8:30 a.m. - 9:00 a.m. Breakfast & Registration

Breakfast Sponsored by



9:00 a.m. - 9:15 a.m. Welcome and Introductions
Great Hall

9:15 a.m. - 9:30 a.m. Break/Room Switch

9:30 a.m. - 10:30 a.m. **Session 1**

A. Selected Issues in Special Education Cromwell Room

Martin J. Kehoe, III, Esq., Martin Kehoe and Associates, P.C.,
Albany, NY

B. Grantor Trust Basics Peck Room

Philip A. DiGiorgio, Jr., Esq., DiGiorgio Law Firm, PLLC, Utica,
NY

C. Medicaid 101 City View

- Planning
- Applications
- Hot Topics

Brian L. Miller, CELA, Littman Krooks, LLP, Rye Brook, NY

D. Tech Tips for Streamlining Your Office Jenny's Parlor

Daniel Ross Miller, Esq., Miller & Miller Law Group PLLC,
Brooklyn, NY

10:30 a.m. - 10:45 p.m. Break/Room Switch
Remarks by NYSARC

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10:45 a.m. - 11:45 p.m.

Session 2

A. Pooled Trust Administration

Cromwell Room

Brian L. Miller, CELA, Littman Krooks, LLP, Rye Brook, NY
NYSARC

B. Recent Developments in Guardianship Practice

Peck Room

Laura M. Brancato, Esq., Brancato Law Group, PLLC,
Larchmont, NY

C. Business Entity Formation for the Elder Law Practitioner (proposed)

City View

Philip A. DiGiorgio, Jr., Esq., DiGiorgio Law Firm, PLLC, Utica,
NY

Lisa Delaney, Delaney Corporate Services, Ltd., Albany, NY

D. Ethical Issues

Jenny's Parlor

- Who's the client
- Diminished Capacity
- Attorney/Client Privilege

Joanna C. Feldman, Esq., Maker Fragale & Di Costanzo, LLP,
Rye, NY

11:45 a.m. - 12:10 p.m.

Lunch

Included with event registration

12:10 – 1:00 p.m.

CLE Presentation

Great Hall

The Importance of Cultural Competency in Client Representation

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Description: This program will provide attorneys with practical tools to improve representation of clients from diverse cultural, linguistic, and socioeconomic backgrounds. It examines how cultural differences and implicit bias affect client communication, credibility assessments, and legal strategy. Participants will learn techniques to enhance cross-cultural communication, ensure informed client decision-making, and fulfill ethical obligations in diverse legal settings.

Speaker:

Kristine M. Garcia-Elliott, Esq.
Vishnick McGovern Milizio LLP
New Hyde Park, NY

1.0 MCLE Credit in Diversity, Equity, and Inclusion

1:30 p.m. - 2:30 p.m.

Session 3

A. Community Medicaid Issues (ADLs, NYIA, NHTD, etc.)
Cromwell Room

David I. Kronenberg, Esq., Grimaldi Yeung Law Group,
Brooklyn, NY

B. The Solo and Small Office Practitioner
Peck Room

- Management
- Technology

Joanna C. Feldman, Esq., Maker Fragale & Di Costanzo, LLP,
Rye, NY

C. Special Needs Planning
City View Room

- When do you need a Special Needs Trust vs. simpler planning tools?
- First-party vs. third-party SNTs
- Drafting pitfalls: distribution standards, trustee selection, and preserving benefits
- Coordinating the SNT with the rest of the plan (wills, beneficiary designations, ABLE accounts)
- Trustee selection

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Tara Anne Pleat, Esq., Wilcenski & Pleat PLLC, Clifton Park,
NY

D. Fair Hearings Jenny's Parlor

- Requesting a Fair hearing
- Requesting a case conference
- How best to prepare for and conduct a Fair hearing

Richard A. Marchese, Esq. Woods Oviatt Gilman LLP,
Rochester, NY

2:30 p.m. - 2:45 p.m.

Break/Room Switch

2:45 p.m. - 3:45 p.m.

Session 4

A. Special/Supplemental Needs Trust Administration Cromwell Room

- What trustees wish they knew on day one (and what attorneys don't always tell them)
- Distributions in practice: how to document decisions
- Dealing with SSI/Medicaid reporting, audits, and agency interactions
- Real-world problems: family pressure, beneficiary expectations, and conflict management

Tara Anne Pleat, Esq., Wilcenski & Pleat PLLC, Clifton Park,
NY

B. Home Care Advocacy and the External Appeal Process Peck Room

David I. Kronenberg, Esq., Grimaldi Yeung Law Group,
Brooklyn, NY

C. Estate Administration City View Room

Daniel Ross Miller, Esq., Miller & Miller Law Group PLLC,
Brooklyn, NY
Deepankar Mukerji, Deepankar Mukerji PLLC, White Plains,
NY

D. Bad Trust Horror Stories (Fixing Bad Trusts) Jenny's Parlor

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Philip A. DiGiorgio, Jr., Esq., DiGiorgio Law Firm, PLLC, Utica, NY

3:45 p.m. - 4:00 p.m. Break/Room Switch

4:00 p.m. - 5:00 p.m. **Session 5**

A. Elder Abuse – How to Prevent and Stop It Cromwell Room

Deepankar Mukerji, Deepankar Mukerji PLLC, White Plains, NY

B. Medicaid Trusts from the Practical Perspective Peck Room

- How do you manage clients
- How do you explain to clients

Joanna C. Feldman, Esq., Maker Fragale & Di Costanzo, LLP, Rye, NY

C. Mental Health Guardianships City View

Laura M. Brancato, Esq. Brancato Law Group, PLLC, Larchmont, NY

D. HR-1 Bill Updates Jenny's Parlor

Lindsay V. Heckler, Esq., Center for Elder Law & Justice, Buffalo, NY

5:00 p.m. Adjournment

5:30 p.m. – 8:00 p.m. **Reception & Dinner**
Common Roots Brewing
**RSVP Required*
Price included with event registration

Day 2 - Friday April 24, 2026

8:30 a.m. - 9:00 a.m. Breakfast and Registration

9:00 a.m. - 9:15 a.m. Introduction

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9:15 a.m. – 10:15 a.m. **Cybersecurity and Confidentiality: Ethical Safeguards in Modern Legal Practice**
Great Hall

This presentation will explore an attorneys' ethical duties regarding the use and disclosure of client and non-client information under Rules 1.6, 1.9(c), 1.8(b), and 4.4(b). An attorney and IT professional will highlight risks of inadvertent disclosure and address key considerations when using third-party and cloud-based service providers.

Speakers:

Turgay Aksoy
Director of Information Technology
Woods Oviatt Gilman LLP

Laura M. Brancato, Esq.
Brancato Law Group
PLLC, Larchmont, NY

10:15 a.m. – 10:30 a.m. Break/Room Switch

10:30 a.m. – 11:30 a.m. **Session 6**

A. Service Availability, OPWDD & Discussion Cromwell Room

- OPWDD eligibility basics and timeline, what families experience
- What services are realistically available vs. what families expect
- Advising families holistically about what they can control and setting expectations around what they can't

Tara Anne Pleat, Esq., Wilcenski & Pleat PLLC, Clifton Park, NY

B. Using AI in your law office (stories of success and failure) Peck Room

Brian L. Miller, CELA, Littman Krooks LLP, Rye Brook, NY

C. Guardianships when to use 81 vs 17A City View

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Laura M. Brancato, Esq. Brancato Law Group, PLLC,
Larchmont, NY

E. The Solo and Small Office Practitioner: Management & Technology

Jenny's Parlor

Joanna C. Feldman, Esq., Maker Fragale & Di Costanzo, LLP,
Rye, NY

11:30 a.m. – 11:45 a.m.

Session 7

A. Law Office Management for the Elder Law Attorney Cromwell Room

Daniel Ross Miller, Esq., Miller & Miller Law Group PLLC,
Brooklyn, NY

B. Medicare Discharges & Rehab Care Peck Room

Lindsay V. Heckler, Esq., Center for Elder Law & Justice,
Buffalo, NY

C. Power of Attorney Problems Encountered in Estate Planning City View

Philip A. DiGiorgio, Jr., Esq., DiGiorgio Law Firm, PLLC, Utica,
NY

12:00 p.m.

Adjournment

Facilitators:

Laura M. Brancato, Esq. Brancato Law Group, PLLC, Larchmont, NY (Program Co-Chair)

Lisa Delaney, Delaney Corporate Services, Ltd., Albany, NY

Philip A. DiGiorgio, Jr., Esq., DiGiorgio Law Firm, PLLC, Utica, NY (Program Co-Chair)

Joanna C. Feldman, Esq., Maker Fragale & Di Costanzo, LLP, Rye, NY

Lindsay V. Heckler, Esq., Center for Elder Law & Justice, Buffalo, NY

Martin J. Kehoe, III, Esq., Martin Kehoe and Associates, P.C., Albany, NY

David I. Kronenberg, Esq., Grimaldi Yeung Law Group, Brooklyn, NY

Richard A. Marchese, Esq. Woods Oviatt Gilman LLP, Rochester, NY (Section Chair)

Brian L. Miller, CELA, Littman Krooks LLP, Rye Brook, NY (Program Co-Chair)

Daniel Ross Miller, Esq., Miller & Miller Law Group PLLC, Brooklyn, NY

Deepankar Mukerji, Esq., Deepankar Mukerji PLLC, White Plains, NY

Tara Anne Pleat, Esq., Wilcenski & Pleat PLLC, Clifton Park, NY

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Breakout Room 1: Cromwell Room

Breakout Room 2: Peck Room

Breakout Room 3: City View

Breakout Room 4: Jenny's Parlor