

JOIN US FOR OUR DINNER MEETING

NOV 20



“Trusted Transitions”

Coordinating Estate Planning, Hospice,
and End-of-Life Support for Families

Moderated By:

Kerri Winans Kaley, CSA® Director of Business Development,
The Bristol Assisted Living & Encore Luxury Living

Speaker Panel:

Jill Monoson, Esq., AEP® Kestenbaum & Mark, LLP

Susan Capurso, (End-of-Life Doula)

Alison Fenech, MSW, MJHS (Hospice Presenter)



One10
569 Broadhollow Rd
Mellville NY

[CLICK HERE TO RSVP ONLINE BY
NOVEMBER 17th](#)

5:30pm – 8:30pm
5:30pm – Cocktails
6:30pm – Program



No Charge for Members in Good Standing, Guest: \$75.00

Thank you to our CLE facilitator, Rivkin Radler!



View Speaker Bios:

[Kerri](#), [Jill](#), [Susan](#), [Alison](#)



View Speaker Materials

Learning Objectives: (1) Identify key estate planning documents that prevent conflict and support end-of-life decision-making. (2) Differentiate hospice from palliative care and explain the scope of hospice services. (3) Describe the role of an end-of-life doula and how they complement legal and hospice support. (4) Apply an inter-professional workflow to a case scenario to coordinate care. (5) Recognize ethical and family conflict issues and understand pathways for resolution.

CLE credit sponsored by Rivkin Radler, LLP – NYS CLE Accredited Provider

This course is intended for experienced attorneys only

1 Credit in Professional Practice

Prerequisite: None
Level of Knowledge: Intermediate

Recommended CPE credit: 1 credit in the Advisory Services area.
New York State Sponsor Identification Number: 002917

Teaching Method: Live
Advanced Preparation: None

MEMBER UPDATES

MEMBERS IN THE NEWS

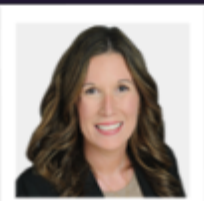
EPCLI VP **Joe La Ferlita** and our NAEPC Liaison **Rick Chalifoux** receiving The Council of Excellence Award for the 4th consecutive year!



Henry Lievre has been selected as the Legacy Honoree for the 70th Anniversary Celebration of the Variety Boys & Girls Club of Queens.



Congratulations to our council members **Stephanie Alberts** and **Rachel Partain** on being selected for the 2025 New York Metro Super Lawyers list!



Super
Lawyers

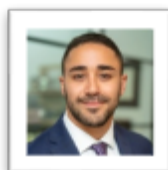
WELCOME NEW MEMBERS TO THE COUNCIL

MEMBER PORTAL

The following applications for membership have been approved by the Board of Directors. Please take a moment to introduce yourself and say hello at the next meeting!



**KIMBERLY
SCHECHTER**



**JONATHAN
ROITMAN**



**EDWARD
BAKER**

Our Council continues to expand our membership with new professionals. Please invite a colleague or acquaintance in the estate planning community as a guest to one of our meetings.

The Council would be proud to feature you in a future newsletter. Do you have news to share or have you authored an article?

CONTACT
ADMIN@EPCLONGISLAND.COM

Photos from our PREVIOUS MEETING



Thank you to our featured speaker **Elizabeth Forspan** for an insightful and entertaining program at the council's meeting at the Bristol Assisted Living in Garden City.





NOVEMBER 2025

Please Mark Your Calendars
UPCOMING EVENTS



Breakfast Meeting
 Dinner Meeting
 Study Group/Other

NOV 12 - 3:00pm	<u>Study Group/NAEPC Live Webinar</u> Paul R. Greenwood, JD, LL.B.
NOV 20 - 5:30pm	<u>"The Last Chapter: Supporting Clients Through End-of-Life Planning. How to Help Families Prepare with Compassion & Clarity"</u> Moderator: Kerri Winans Kaley- Speaker Panel: Jill Monoson, Esq., Susan Capurso (Legacy Consultant Advisor), and Alison Frank (hospice presenter)
DEC 18 - 8:00am	<u>"Serving as Trustee - Tips & Traps"</u> Richard G. Chalifoux, JD, AEP, Raymond C. Radigan, JD and David Bamdad, Esq.
JAN 8 - 5:30pm	<u>Evening Winter Social</u> The Paramount- 370 New York Ave, Huntington, NY
JAN 22 - 5:30pm	<u>"Don't Lien on Me" Tax Liens</u> Scott Kestenbaum, Esq. & Jill Monoson, Esq. - Kestenbaum & Mark LLP
FEB 12 - 8:30am	<u>ZOOM Meeting: "Heckerling Update"</u> Kevin Matz, Esq. 8:30am - 9:30am
FEB 26 - 8:00am	<u>Breakfast Meeting- "Professional Mental Health & Well Being"</u> Martin M. Shenkman, PC
MAR 19 - 5:30pm	<u>"Administering Estates: Trusts with Difficult, Challenging or Unusual Assets"</u> Brian D. Conboy & Elisa M. Pickel, Esq. - Fiduciary Trust International
APR 23 - 8:00am	<u>"Surrogates' Court Update"</u> Nassau, Suffolk, & Queens County Surrogates
JUN 2 - 5:30pm	<u>Annual Officers' Conferment Dinner</u> Venue: Crescent Beach Club, Bayville, NY

Want to learn more about the council's upcoming events?
Check out our Events Page.

EVENTS PAGE



NOVEMBER 2025



A Special Thank You To OUR COUNCIL'S SPONSORS

Our sponsors provide tremendous financial support to the council, allowing us to maintain the cost of dues without an increase for nearly 10 years. They support the estate planning profession with advice, products, and services that benefit our clients. Please keep them in mind when you have a need.

WE WOULD LIKE TO THANK OUR PLATINUM SPONSORS!



WE WOULD LIKE TO THANK OUR GOLD SPONSORS!



WE WOULD LIKE TO THANK OUR SILVER SPONSORS!



SPONSOR SPOTLIGHT

VERONICA KARAS CFP®,CDFA®,
Principal | Financial Advisor, Captrust

TELL US ABOUT CAPTRUST

CAPTRUST is one of the largest Registered Investment Advisor (RIA) and Fiduciary wealth management firms in the US. Our Lake Success office, formerly known as FCE Group, merged into CAPTRUST in October 2018. Our team manages over \$3 billion in assets. Our clients are individuals and families, professionals and business owners. We have provided customized independent financial planning, investment advisory, wealth management services to our clients continuously for over 40 years.

TELL US ABOUT YOU AND YOUR ROLE

Veronica joined CAPTRUST in 2018 and serves as a Principal | Financial Advisor. She has extensive experience working with high-net-worth individuals and small businesses in all areas of financial planning, including estate planning, retirement planning, tax planning, education planning, and insurance. Veronica previously worked as a financial planner at FCE Group; a financial planner for a team of advisors in Merrill Lynch's global wealth management division; and as a financial advisor and director of marketing and business development at Circle Advisors Inc.

WOULD YOU LIKE TO SHARE SOMETHING PERSONAL ABOUT YOURSELF?

When she is not in the office or with a client, Veronica enjoys helping people through transformational life coaching, volunteering at Rescue City, and spending time with her husband, their two sons, and three rescued pets. She is the co-President of the CAPTRUST Community Foundation. Veronica is the author of the 'Money Matters' series of books which includes: Money Matters: Everything You Should Have Learned in School, but Didn't, Money Matters: Merging Lives, Merging Finances, and Money Matters: Avoid Getting 'Sandwiched' out of Retirement.

Contact Veronica at veronica.karas@captrust.com

Interested in becoming a Sponsor for 2024-25? Visit our Sponsor Form for more information or email zaloney@hotmail.com.

[SPONSOR FORM](#)

COUNCIL LEADERSHIP



President
Alison Gladowsky
Esq., AEP®



Vice President
Joseph T. La Ferlita
Esq.



Treasurer
Jeffrey Gibraltar
CPA/ABV/CFF®, CFE, AEP®



Secretary
Alyssa Danziger
Esq.



Immediate
Past President

Peter S. Manzi
CFP®, CEPA®



Executive Board Member
Brian D. Conboy
TO



Executive Board Member
Charles R. DeRiso
CPA



Executive Board Member
Mark Mohtashemi
J.D., LL.M., MBA, CFP®



Executive Board Member
Nicholas G. Moneta
Esq.



Executive Board Member
Elisa Pickel
Esq.



Executive Board Member
Joanne Campbell Schiefer
AFP



Executive Board Member
Stephen J. Silverberg
Esq., CELA®, AEP®



Executive Board Member
Nicole M. Smith
Esq.



NAEPC Liaison
Richard G. Chalifoux
J.D., AEP®



Council Administrator
Lisa Maloney

Committee Chairs

Membership Alyssa Danziger	Associate Membership Nicholas G. Moneta	Law School Student Member Program Johanna David & Brian Conboy	Speakers & Program Joseph T. La Ferlita	Continuing Education Alison Gladowsky & Thomas Gallo	Study Group Christina Jonathan
Digital Media & PR Nicole Smith	Newsletter Peter Manzi	Community Outreach Kim Smith & Nicole Smith	Sponsorship Peter Manzi	Nominating Richard G. Chalifoux	By-Laws Richard G. Chalifoux

Our council needs you! There are many opportunities to be more active with our council that would benefit from your time and talents on behalf of the council. Please consider joining a committee and help us continue a legacy of success!

**VIEW OUR
COMMITTEES**

MEMBER REMINDERS



Raise your professional profile within our council. If you have written an article, received an award, changed firms/companies, joined a related organization please let us know so we can feature the news in a future newsletter.



Please review your EPCLI directory profile to ensure you have a headshot and current bio.



Make full use of your membership and review the resources offered by NAEPC:
[National Association of Estate Planners & Councils - NAEPC](#)



Access the complimentary NAEPC Journal of Estate & Tax Planning:
[NAEPC Journal of Estate & Tax Planning](#)



Consider applying for the AEP designation:
[AEP Introduction - NAEPC](#)

THANK YOU!



Thank you to our members and sponsors!

Winner of the NAEPC Council of Excellence Award

2016 ★ 2018 ★ 2022 ★ 2023 ★ 2024 ★ 2025

Winner of the NAEPC 5 Star Council Award

2015 ★ 2017 ★ 2019 ★ 2020 ★ 2021



This newsletter was designed for the Estate Planning Council of Long Island by Steve Danziger
Contact s1danziger@gmail.com for inquiries

NOVEMBER 2025