

JOIN US FOR OUR DINNER MEETING

JAN 22



“Don’t Lien on Me”

Tax Liens: Federal and State Discharging Liens



**Scott Kestenbaum, Esq.** – Kestenbaum & Mark, LLP  
**Jill Monoson, Esq.** – Kestenbaum & Mark, LLP



**Volpe at Fox Hollow**  
7725 Jericho Turnpike  
Woodbury, NY 11797



**5:30pm – 8:30pm**  
Cocktails: 5:30pm  
Dinner & Program: 6:30pm

[CLICK HERE TO RSVP ONLINE BY JAN 18](#)

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

*Thank you to our CLE facilitator, Rivkin Radler!*



View Speaker Bios:

[Scott, Jill](#)



View Speaker Materials

**Learning Objectives:** The presentation will cover the discharge of income tax liens by the IRS and New York State (NYS), exploring the conditions under which these liens can be removed or resolved. It will delve into the specific procedures for requesting a discharge, the required forms, and key factors that influence approval. Additionally, the presentation will address the release of estate tax liens by both the IRS and NYS, highlighting the unique circumstances and processes involved in discharging liens related to estate taxes. Practical insights will be provided on how individuals and businesses can navigate these complex tax lien issues. We hope to educate the group on tax liens and expand their understanding on how to release liens.

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 Tax Services area.  
New York State Sponsor Identification Number: 002917

Teaching Method: Live  
Advanced Preparation: None

## MEMBER UPDATES

### MEMBERS IN THE NEWS

**Lois Bladykas** of Ruskin Moscou Faltischek and **Nicholas Moneta** of Rivkin Radler have been recognized by Best Lawyers for 2026.



*Best Lawyers*

**Edward Baker** has been promoted to Partner at Farrell Fritz, P.C..



### 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!



**WENDY  
SHEINBERG**



**EVAN  
GLASS**

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](mailto:ADMIN@EPCLONGISLAND.COM)

Photos from our  
**HOLIDAY CELEBRATION**



Thank you to our generous host  
and valued sponsor The New York  
Community Trust for a wonderful  
holiday celebration!

*The New York*  
Community Trust



Photos from our  
PREVIOUS MEETING



Thank you to **Richard Chalifoux, Raymond Radigan, and David Bamdad** for an insightful program on how to “Protect Yourself or Your Client as a Fiduciary” at The Bristol Assisted Living in Westbury.

Protect Yourself or  
Your Client as a Fiduciary -  
From a Practical and  
Litigation Perspective





JANUARY 2026

Please Mark Your Calendars  
**UPCOMING EVENTS**



*Breakfast Meeting*
 *Dinner Meeting*
 *Study Group/Other*

<b>JAN 22 - 5:30pm</b>	<p><b><u>“Don’t Lien on Me” Tax Liens</u></b>            Scott Kestenbaum, Esq. &amp; Jill Monoson, Esq. - Kestenbaum &amp; Mark LLP            Volpe at Fox Hollow, Woodbury, NY</p>
<b>FEB 12 - 8:30am</b>	<p><b><u>“Heckerling Update”</u></b> - Joint virtual meeting with Westchester Council            Kevin Matz, Esq.   8:30am – 9:30am   Zoom</p>
<b>FEB 26 - 8:00am</b>	<p><b><u>Breakfast Meeting- “Professional Mental Health &amp; Well Being”</u></b>            Martin M. Shenkman, PC            The Bristol, 310 Jericho Tpke, Jericho, NY</p>
<b>MAR 19 - 5:30pm</b>	<p><b><u>“Administering Estates: Trusts with Difficult, Challenging or Unusual Assets”</u></b>            Brian D. Conboy &amp; Elisa M. Pickel, Esq. - Fiduciary Trust International</p>
<b>APR 23 - 8:00am</b>	<p><b><u>“Surrogates’ Court Update”</u></b>            Nassau, Suffolk, &amp; Queens County Surrogates</p>
<b>JUN 2 - 5:30pm</b>	<p><b><u>Annual Officers’ Conferment Dinner</u></b>            Venue: Crescent Beach Club, Bayville, NY</p>

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

**EVENTS PAGE**



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## 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!



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## SPONSOR SPOTLIGHT

**JOSEPH LA FERLITA**  
Partner, [Rivkin Radler](#)

### TELL US ABOUT RIVKIN RADLER

Through 250 lawyers and offices on Long Island, Manhattan, Albany, Poughkeepsie, New Jersey, and Florida, Rivkin Radler is consistently Driven to Deliver® focused and effective legal services. Its practice areas cover trusts and estates, elder law, tax, corporate, real estate, construction, intellectual property, health care law, insurance law, labor law, immigration, and many others.

### TELL US ABOUT YOU AND YOUR ROLE

Joseph La Ferlita practices 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 in the Surrogate's Court and the United States Tax Court. Joe is the VP a long-time member of the Executive Board of the EPCLI. He was elected by his peers as a Fellow of the American College of Trust and Estate Counsel, which is a prestigious association of the nation's top estate lawyers. In addition, he is Co-Chair of the Estate Planning Committee of the NY State Bar Association.

### WOULD YOU LIKE TO SHARE SOMETHING PERSONAL ABOUT YOURSELF?

In a former life, Joseph was a high school teacher for three years. Then and now, his goal has been to take time to explain sometimes complicated matters into "plain English."

Contact Joseph at [Joseph.LaFerlita@rivkin.com](mailto:Joseph.LaFerlita@rivkin.com)

Interested in becoming a Sponsor for 2025-2026? Visit our Sponsor Form for more information or email [admin@epclongisland.com](mailto:admin@epclongisland.com).

**SPONSOR FORM**

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**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](mailto:s1danziger@gmail.com) for inquiries

**JANUARY 2026**