



OCTOBER 2026



NEWSLETTER

JOIN US FOR OUR BREAKFAST MEETING

E.T. Phone Home: Domicile, Statutory Residency, and Lessons from Recent Decisions



View Speaker
[Materials](#) | [Bio](#)



LEARNING OBJECTIVE

Distinguish the two tests for NY residency and apply each independently. Analyze the permanent place of abode and day-count requirements in light of recent court decisions. Advise clients on completing and defending a change of domicile.

Speaker: Scott Kestenbaum, Esq., Partner, Kestenbaum & Mark, LLP [in](#)

⌚ WHEN

**Thursday,
October 22**

8:00am: Breakfast
& Program

📍 WHERE

**The Bristol Assisted
Living at Garden City**

1001 Axinn Ave.
Garden City, NY 11530

\$ ADMISSION

**No Cost
For Members**

in good standing
Guests: \$30

CLICK HERE TO RSVP

ONLINE BY OCTOBER 19

Thank you to our CLE facilitator, Rivkin Radler!

COUNCIL FOOD DRIVE

Help us support Long Island food pantries

Government funding for food pantries has greatly diminished this year. Within our Long Island Communities there are over 287,000 residents who are considered Food Insecure with over 58,000 of them estimated to be children. Among them are the elderly and U.S. veterans.

The Estate Planning Council of Long Island is responding to this crisis and collecting non-perishable food for Island Harvest Food Bank of Long Island at our October 22nd breakfast meeting. Please consider bringing something to help feed a family in need.

[Learn more about Island Harvest →](#)

- Board of Directors - Estate
Planning Council of Long Island

287,000

Long Islanders face **food insecurity**.

58,000

Of them are **children**.



**ISLAND
HARVEST**
MEMBER OF
FEEDING
AMERICA
Nourishing Long Island's Future

Visit the NAEPC website for valuable council resources, including the latest issue of the Journal of Estate and Tax Planning.

VISIT NAEPC SITE

MEMBER UPDATES

MEMBERS IN THE NEWS



DOYLE'S GUIDE · 2026

Stephanie Alberts Named Leading Trusts, Estates & Probate Litigation Lawyer

Congratulations to Stephanie M. Alberts, Partner in the Trusts and Estates group at Forchelli Deegan Terrana LLP, on her selection for Doyle's Guide New York City 2026, an independent, peer-review-based ranking of leading lawyers. [Read on LinkedIn](#)



Ellen Makofsky

Founding Partner

Makofsky Valente Law Group, P.C.

Best of Nassau 2026: Best Estate Planning Lawyer and Best Law Firm/Lawyer

Her firm earned honors both categories in the countywide vote.

[Read on LinkedIn](#)



Patricia Galteri

Managing Attorney

Meyer, Suozzi, English & Klein, P.C.

Named to Long Island Business News' 2026 Influencers in Law

Recognized for her longstanding commitment to clients, her firm, and the Long Island's business community.

[Read on LinkedIn](#)



Jonah Blumenthal

JD · Financial Advisor

Opal Wealth Advisors

Joins Blood Cancer United's 2027 LI Visionaries of the Year Leadership Committee

Jonah is opening his network to help advance the organization's mission.

[Read on LinkedIn](#)

WE WELCOME NEW MEMBERS TO THE COUNCIL

MEMBER PORTAL

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



Thank you to our speakers:
Elyse Luray, Bill Roland, Electra Washburn, and our moderator
Brian Conboy for an engaging
and insightful session on Estate
Planning for Art & Collectibles
at our September Kickoff
Dinner!





OCTOBER 2026

Please Mark Your Calendars
UPCOMING EVENTS



 Breakfast Meeting

 Dinner Meeting

 Study Group/Other

OCT 21 – 11:00am

[NAEPC Estate Planners Forum](#) - Samuel A. Donaldson, JD, LL.M., AEP®, Lawrence J. Rybka, JD, CFP®, AEP®, Jamie P. Hopkins, JD, MBA, LL.M., CLU®, ChFC®, CFP®, RICP®, and Natalia K. Gentry, JD – **Virtual**

OCT 22 – 8:00am

["E.T. Phone Home: Domicile, Statutory Residency, and Lessons from Recent Decisions"](#) - Scott Kestenbaum, Esq. – Kestenbaum & Mark, LLP
The Bristol, Garden City

NOV 19 – 5:30pm

[Dinner Meeting TBA](#)
Volpe at The Fox Hollow

DEC 10 – 5:30pm

["IRAs"](#)
Ed Slott, CPA, Ed Slott and Company, LLC
Volpe at The Fox Hollow

JAN 21 – 5:30pm

[Dinner Meeting TBA](#)
Volpe at The Fox Hollow

FEB 18 – 8:00am

["Long Term Care Insurance"](#) -
Wendy Sheinberg, Esq. – Rivkin Radler and Jonathan Schwartz- NY Life
Venue TBA

MAR 18 – 5:30pm

["Business Succession Planning"](#) -
Neil D. Katz, Esq., AEP- Katz Chwat, P.C. and Jeffrey Gibraltar, CPA/ABV/CFF, CFE, AEP- Reid Forensic & Valuation Group, LLC | **Volpe at The Fox Hollow**

APR 20 – 8:00am

["Surrogates' Update"](#)
Nassau & Suffolk County Surrogates
Venue TBA

JUN 7 – 5:30pm

[Annual Officers' Conferment Dinner](#)
Crescent Beach Club, Bayville

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

EVENTS PAGE



OCTOBER 2026

A Special Thank You To
OUR 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.



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WE WOULD LIKE TO THANK OUR GOLD SPONSORS!



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Law Student Member Program Johanna David & Brian Conboy	Digital Media & Public Relations Nicole Smith	By-Laws Richard G. Chalifoux	Newsletter Peter Manzi & Charles R. DeRiso

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

MEMBERS IN THE NEWS

Raise your professional profile within our council. If you have published 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.

[Email to tell us your news →](#)



TIPS TO GET THE MOST OUT OF YOUR COUNCIL MEMBERSHIP



Update your directory profile

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

[Update your Member Profile →](#)



Use your NAEPC member resources

Council membership includes full access to NAEPC's national library of practice resources.

[Browse NAEPC resources →](#)



Read the Journal of Estate & Tax Planning

Access the complimentary NAEPC Journal of Estate & Tax Planning.

[Open the current issue →](#)



Consider applying for the AEP® designation

NAEPC's multi-disciplinary credential is open to planners with five or more years in active practice.

[See the requirements →](#)

THANK YOU!



Thank you to our members and sponsors!

Winner of the NAEPC Council of Excellence Award

2016 ★ 2018 ★ 2022 ★ 2023 ★ 2024 ★ 2025 ★ 2026

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

LEARNING · COLLABORATION · CONNECTION