

JOIN US FOR OUR KICKOFF DINNER

Estate Planning for Art & Collectibles



View Speaker
Materials & Bios



Elyse Luray

Heritage Auctions



Bill Roland

Roland Auctions



Electra Washburn

Doyle Auctioneers
& Appraisers

Moderated by:



Brian D. Conboy

Director of Estate
Administration and Trust
Counsel, Fiduciary Trust
International

🕒 WHEN

**Thursday,
September 17**

5:30-6:30pm Cocktails
6:30-8:00pm Dinner & Program

📍 WHERE

**Volpe at
The Fox Hollow**

7725 Jericho Tpke
Woodbury, NY 11797

💰 ADMISSION

**No Cost
For Members**

in good standing
Guests: See below

CLICK HERE TO RSVP

ONLINE BY SEPTEMBER 11

Thank you to our CLE facilitator, Rivkin Radler!

BRING A PROSPECTIVE MEMBER FOR FREE! – For this meeting only, we are waiving the normal \$75 guest charge for any “qualified guest” of a Member. A qualified guest is someone who qualifies as a member (see bylaws on website, e.g., a practicing T & E attorney, CPA, financial advisor, trust professional) who is interested in joining our Council.

LEARNING OBJECTIVES

This program examines the lifecycle of art, collectibles, and tangible personal property from acquisition through succession. Panelists will discuss collection management, valuation, appraisal standards, estate and tax considerations, fiduciary administration, next-generation planning, and strategies for the ultimate sale, distribution, or preservation of collections.

ACCREDITATION

Sponsored by Rivkin Radler, LLP
NYS CLE Accreditation Provider
Sponsor ID 002917

CPE & CLE CREDITS

CPE: 1 Credit – Specialized Knowledge
CLE: 1 Credit – Specialized Knowledge
Intended for Experienced Attorneys Only

DETAILS

Teaching Method: Live
Level of Knowledge: Intermediate
No Pre-requisites or Advanced Preparation

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

VISIT NAEPC SITE

A LETTER FROM JOSEPH LA FERLITA

COUNCIL PRESIDENT



Sep 1, 2026

Council Members,

I am pleased to announce that the Estate Planning Council of Long Island (EPCLI) was just awarded the Leonard H. Neiman & Walter Lee Davis, Jr. Council of Excellence Award for the 2025-2026 year (medium-sized council category) by the National Association of Estate Planners & Councils (NAEPC). This is the highest and most prestigious recognition that NAEPC offers, which the EPCLI has now won five consecutive years, with seven total top wins since the award's inception. In fact, this marks twelve consecutive years that the EPCLI has won an award from NAEP, which is a remarkable achievement given that there are 250 councils nationwide. I am grateful for the dedicated service of the EPCLI's Board of Directors, and for our enthusiastic and growing membership, which make this award possible. Winning this award is a great way to kick off the new Council year, which I am confident will be just as successful as last year.

Created in 2014, the National Association of Estate Planners & Councils Leonard H. Neiman & Walter Lee Davis, Jr. Council of Excellence Award recognizes councils that are successful in their efforts to provide a strong multi-disciplinary council for their members. Created by a group of council leaders, past presidents of NAEPC, and current Board and Council Relations Committee members, with all council sizes in mind, the Council of Excellence Award is intended to honor those councils that truly work to grow their programs and services and provide an exceptional member experience.

Very Truly Yours,

Joseph T. La Ferlita

2026-2027 Council President

“

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MEMBER UPDATES

MEMBERS IN THE NEWS

Alyssa Danziger Awarded AEP® Designation



Congratulations to Council Secretary **Alyssa Danziger** of Katz Chwat, P.C., who was newly awarded the Accredited Estate Planner® designation by NAEPC. The AEP® recognizes rigorous standards of education, experience, and peer standing, and a commitment to the team concept of estate planning that defines our Council.



Anastasia Cassisi has joined Meltzer, Lippe, Goldstein & Breitstone, LLP
[Read on LinkedIn](#)



Lisa Rispoli was named an ICON at the 2026 Dan's Power Women of the East End Awards
[Read on LinkedIn](#)

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!



ALEC SIMITIAN
CPA
Andersen



JOSEPH ROMERO
Accredited Financial Planner
Lido Advisors



ADRIEN VENTURA
Trust Professional
Bank of America Private Bank



MICHAEL PLACTERE
CPA
Citrin Cooperman Advisors

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.



SEPTEMBER 2026

Please Mark Your Calendars
UPCOMING EVENTS



Breakfast Meeting

Dinner Meeting

Study Group/Other

SEP 17 – 5:30pm

"Estate Planning for Art and Collectibles"

Doyle Auctioneers & Appraisers- Electra Washburn, Heritage Auctions-Elyse Luray, Roland NY- Bill Roland, **Volpe at the Fox Hollow**

SEP 23 – 3:00pm

Study Group / Webinar: The Inside Scoop on the P&C Insurance Market

Michelle Hirsch, CAPI
Virtual

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

"NYS Residency Audits"

Scott Kestenbaum, Esq. – Kestenbaum & Mark, LLP
Venue TBA

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



SEPTEMBER 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.

WE WOULD LIKE TO THANK OUR PLATINUM SPONSORS!



WE WOULD LIKE TO THANK OUR GOLD SPONSORS!



Interested in becoming a Sponsor for 2026-2027? Visit our Sponsor Form for more information or email admin@epclongisland.com.

[SPONSOR FORM](#)



SEPTEMBER 2026



COUNCIL LEADERSHIP



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Joseph T. La Ferlita
Esq.



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



Secretary
Alyssa Danziger
Esq., AEP®



Immediate Past President
Alison Gladowsky
Esq., AEP®

★ Board Members ★



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®



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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 & Charles R. DeRiso	Community Outreach Kim Smith & Nicole Smith	Sponsorship Peter Manzi & Veronica Karas	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 ★ 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