



JOIN US FOR OUR POST  
HOLIDAY COCKTAIL PARTY

## THE FOUNDER'S ROOM

LOCATED BELOW THE PARAMOUNT

THURSDAY,

January 8<sup>th</sup>

5:30pm – 8:00pm

RSVP BY JANUARY 5<sup>th</sup>

CLICK HERE TO RSVP



Open Bar: 5:30pm–8:00pm  
Passed Appetizers: 6pm–7pm



**The Paramount**  
370 New York Ave,  
Huntington, NY 11743



**NO ENTRY FEE**  
FOR COUNCIL MEMBERS

## ABOUT THE VENUE



“The Founder’s Room is designed as a 1920’s speakeasy. We like to believe that we have captured the sights, smells, tastes and heartbeat of an erstwhile era. The Founder’s Room offers a variety of private themed rooms, curiosities, bespoke cocktails & food.”

<https://www.paramountny.com/founders-room>



## MEMBER UPDATES

### MEMBERS IN THE NEWS



#### Alyssa Danziger Promoted to Partner

Congratulations to Alyssa Danziger who was promoted to Partner at Katz Chwat, P.C.



#### Joseph La Ferlita Elected Fellow

Joseph La Ferlita has been elected a fellow of the American College of Trust and Estate Council in Washington, D.C.



#### Charles DeRiso Named EPC Newsletter Co-Editor

Charles DeRiso has been named Co-Editor of the Estate Planning Council of Long Island Newsletter, working alongside Peter Manzi.

Congratulations to **Jennifer Cona** and **Patricia Galteri** on being named to LIBN's *Top 100 Long Islanders*. [Click to Read More](#)



Congratulations to our council members on being selected for the **2025 New York Metro Super Lawyers** list!

Moriah Adamo  
Stephanie M. Alberts  
Gina Raio Bitsimis  
Lois Bladykas  
Suzanne Q. Burke  
Jennifer B. Cona  
Alyssa Danziger  
Jennifer F. Hillman  
Joseph T. LaFerlita  
Ellen G Makofsky  
Scott B. Silverberg  
Stephen J Silverberg

Neil D. Katz  
Patricia Marcin  
Jill S. Monoson  
Kim Smith  
Lisa Valente

Super  
Lawyers®

### WE WELCOME NEW COUNCIL MEMBERS

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

Photos from our  
PREVIOUS MEETING



Thank you to **Kerri Winans-Kaley, Jill Monoson, Susan Capurso, and Alison Fenech** for an insightful panel discussion on "Supporting Clients through End-Of-Life Planning" at One10 in Melville.





DECEMBER 2025

Please Mark Your Calendars  
**UPCOMING EVENTS**



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

<b>JAN 8 - 5:30pm</b>	<p><b><u>Post Holiday Cocktail Party</u></b>            The Paramount- 370 New York Ave, Huntington, NY</p>
<b>JAN 22 - 5:30pm</b>	<p><b><u>“Don’t Lien on Me” Tax Liens (federal and state discharging 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>ZOOM Meeting: <u>“Heckerling Update”</u></b>            Kevin Matz, Esq.   8:30am - 9:30am</p>
<b>FEB 26 - 8:00am</b>	<p><b><u>Breakfast Meeting- “Professional Mental Health &amp; Well Being”</u></b>            Martin M. Shenkman, PC</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**

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**

**SUSAN AMINOV**

Managing Director, [Webster Private Bank](#)

**TELL US ABOUT WEBSTER PRIVATE BANK**

Webster Private Bank is a division of Webster Bank (NYSE: WBS), a top-performing Northeast financial services firm and one of the 50 largest financial institutions in the country. Our team has decades of experience working for individuals, families, and business owners, providing financial strategies and solutions that help clients achieve financial peace of mind.

We offer a comprehensive suite of services in investment management, fiduciary services, financial planning, and tailored lending that are designed to support our clients' diversified financial needs. We have offices in CT, NY, MA, and RI with our NY office based in Garden City.

**TELL US ABOUT YOU AND YOUR ROLE**

As Managing Director, with over 20 years of experience, my focus is on providing customized plans for high-net-worth clients helping them achieve their financial goals. Covering the metro New York area, my colleagues (Rick Chalifoux, Allen Margolius and Pat Casey) and I work closely with each client to deliver our full suite of products and services including investment, trust and estate services and customized lending solutions.

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

Family is such an important part of who I am. I am blessed to be the mother of a beautiful 5 year old boy. I am also very happy to be a new member of the Council and I look forward to working with everyone.

## 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 & Charles R. DeRiso

**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  
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**DECEMBER 2025**