

JOIN US FOR OUR BREAKFAST MEETING

FEB 26



“Lawyers, Financial Professionals
and Mental Health Concerns:
Making the Case for Change”

Speakers:

Amanda Koplín, LPC, Koplín Consulting
Martin M. Shenkman, PC, Shenkman Tietz, LLP



The Bristol
310 Jericho Turnpike
Jericho, NY 11753

[CLICK HERE TO RSVP
ONLINE BY FEB 23rd](#)

Breakfast Meeting
8:00am – 10:00am



No Charge for Members in Good Standing, Guest: \$30.00

Thank you to our CLE facilitator, Rivkin Radler!



[Speaker Materials](#)

JOIN US FOR OUR VIRTUAL MEETING

FEB 12



“Heckerling Update”

[EVENT PAGE](#)

Joint Virtual Meeting with the Westchester Council

Speaker: **Kevin Matz**, Esq.



Meeting Time
8:30am – 9:30am



MEMBER UPDATES

MEMBERS IN THE NEWS

Alan Weiner was featured in Suffolk Lawyer Legal Brief on “The Lighter Side of the Law.”



THE
Lighter Side
OF THE LAW
Life's an open book to Attorney/CPA Alan E. Weiner
By Mary Talley Photo Courtesy Alan Weiner

“Life’s and open book to
Attorney/CPA Alan E. Weiner”

[Click to read the Article](#)

Lisa Rispoli was interviewed by “STEP – Advising Families Across Generations” on guiding families through complex financial decisions



[Click to View](#)

Patricia C. Marcin has published an article outlining the new 2026 federal and New York estate and gift tax exemptions and what they mean for high-net-worth planning.



[Click to Read](#)

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!



**CHUNXIA
COLE**



**MARY T.D.
DELMAN**



**CARLOS
RODRIGUEZ**

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



Founder's Room
Members Only

THE FOUNDER'S ROOM
at the Paramount, Huntington NY
January 8th, 2026



Photos from our PREVIOUS MEETING



Thank you to **Scott Kestenbaum and Jill Monson** for "Don't Lien on Me!" – an insightful primer on IRS and NYS Tax and Estate Tax Liens at Volpe at Fox Hollow.





FEBRUARY 2026

Please Mark Your Calendars
UPCOMING EVENTS



Breakfast Meeting
 Dinner Meeting
 Study Group/Other

FEB 12 - 8:30am	<p><u>"Heckerling Update"</u> - Joint virtual meeting with Westchester Council Kevin Matz, Esq. 8:30am – 9:30am Zoom</p>
FEB 18 - 8:30am	<p><u>"The Tricks and Traps of Investment Management"</u> - STUDY GROUP/Webinar Randolph B. Cohen, Harvard Business School MBA Class of 1975 Senior Lecturer</p>
FEB 26 - 8:00am	<p><u>Breakfast Meeting- "Professional Mental Health & Well Being"</u> Martin M. Shenkman, PC The Bristol, 310 Jericho Tpke, Jericho, NY</p>
MAR 19 - 5:30pm	<p><u>"Administering Estates: Trusts with Difficult, Challenging or Unusual Assets"</u> Brian D. Conboy & Elisa M. Pickel, Esq. - Fiduciary Trust International</p>
APR 23 - 8:00am	<p><u>"Surrogates' Court Update"</u> Nassau, Suffolk, & Queens County Surrogates</p>
JUN 2 - 5:30pm	<p><u>Annual Officers' Conferment Dinner</u> Venue: Crescent Beach Club, Bayville, NY</p>

Want to learn more about the council's upcoming events?
 Check out our [Events Page](#).

EVENTS PAGE



FEBRUARY 2026

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.

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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 for inquiries

FEBRUARY 2026