

NEWSLETTER

JOIN US FOR OUR SEPTEMBER 16th KICKOFF MEETING



“Federal Tax Update”

Speaker: Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished)
Interim Associate Dean for Academic Affairs and Professor of Law
Georgia State University College of Law



Volpe at Fox Hollow

7725 Jericho Turnpike, Woodbury, NY 11797



5:30pm Cocktails and Networking
7:00pm Dinner and Program

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



[CLICK HERE TO RSVP ONLINE BY 9/12/25](#)

*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.*



Council of
Excellence

We are thrilled to share that our council has once again been honored with the NAEPC Council of Excellence Award in the mid-size category marking our **4th consecutive win** and **6th Council of Excellence Award** since 2016!

This recognition reflects our continued commitment to delivering exceptional programming and fostering collaboration within our professional community.



A LETTER FROM ALISON GLADOWSKY

COUNCIL PRESIDENT



Dear Members,

It is an exciting start to the year for our Council and I am proud to share some wonderful news. We have once again been awarded the National Association of Estate Planners & Councils (NAEPC) Council of Excellence Award in the medium-size council category. This honor reflects your continued commitment, participation and support, and I am truly grateful to be part of such a dedicated and dynamic community.

Joe LaFerlita and our Speakers Committee have been hard at work behind the scenes putting together an outstanding lineup of speakers and topics. I am especially looking forward to our kickoff event Tuesday, September 16th at Volpe with a timely Federal Tax Update featuring Samuel A. Donaldson.

Our Sponsorship Committee, led by Peter Manzi, has also been busy, securing several excellent new sponsors while maintaining strong relationships with our current sponsors. I encourage everyone to take the time to learn more about our sponsors and reach out whenever they can be a resource for you or your clients.

Our Digital Media Committee will also continue to keep you updated through our online newsletter, thanks to the collaboration between Chair Peter Manzi and Steve Danziger.

If you have not yet pursued your Accredited Estate Planner® (AEP®) designation, I strongly encourage you to do so. This credential is a valuable way to demonstrate your expertise and your commitment to the highest standards in estate planning.

Let's also use this momentum to grow our membership. I invite you to bring a colleague or potential new member to one of our upcoming programs so they can experience firsthand the benefits of being part of our award-winning council.

I look forward to seeing you at our events, sharing in our successes and continuing to build on the excellence we have achieved together.

Respectfully,

Alison Gladowsky, Esq.
2025-2026 Council President



SUMMER 2025 BOARD MEETING

MEMBERS IN THE NEWS

“Is It Time for Medically Assisted End of Life?”



A 2024 poll showed strong public support for New York’s Medical Aid in Dying Act (M.A.I.D.), backed by major legal and civil rights groups. It has recently passed the state legislature, giving terminally ill people an option to avoid prolonged suffering.

An article authored by our council’s Patricia Marcin addresses this issue. [Click to read more.](#)

Patricia Galteri and Alan E. Weiner Named 2025 ICON Honorees

Icon Honors recognizes Long Island business leaders, over the age of 60, for their notable success and demonstration of strong leadership within and outside their fields. Honorees are selected by Long Island Business News.



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



SEPTEMBER 2025



Please Mark Your Calendars
UPCOMING EVENTS

Breakfast Meeting
 Dinner Meeting
 Study Group/Other

SEP 10 - 3:00pm	<u>Study Group/NAEPC Live Webinar</u> Jonathan G. Blattmachr, Esq., AEP® (Distinguished)
SEP 16 - 5:30pm	<u>"Kick-Off Dinner Meeting- "Federal Tax Update""</u> Samuel A. Donaldson, J.D., LL.M.
OCT 16 - 8:00am	<u>"Medicaid Update"</u> Elizabeth Forspan, Esq.
NOV 12 - 3:00pm	<u>Study Group/NAEPC Live Webinar</u> Paul R. Greenwood, JD, LL.B.
NOV 20 - 5:30pm	<u>"Preparing for How to Handle the Last Moments of a Loved Ones Life"</u> Panel Discussion TBA
DEC 18 - 8:00am	<u>"Serving as Trustee - Tips & Traps"</u> Richard G. Chalifoux, JD, AEP, Raymond C. Radigan, JD and David Bamdad, Esq.
JAN 22 - 5:30pm	<u>"Don't Lien on Me" Tax Liens</u> Scott Kestenbaum, Esq. & Jill Monoson, Esq. - Kestenbaum & Mark LLP
FEB 12 - 8:00am	<u>"Heckerling Update"</u> TBA
MAR 19 - 5:30pm	<u>"Administration of Difficult Assets"</u> Brian D. Conboy & Elisa M. Pickel, Esq. - Fiduciary Trust International
APR 23 - 8:00am	<u>"Surrogates' Court Update"</u> Nassau & Suffolk County Surrogates
JUN 2 - 5:30pm	<u>Annual Officers' Conferment Dinner</u> Venue: Crescent Beach Club, Bayville, NY

SEE OUR COUNCIL EVENTS PAGE FOR MORE DETAILS



62nd Annual NAEPC Advanced
**Estate Planning Strategies
 & Council Leadership Conferences**

Gaylord National Resort & Convention Center
 October 19-23, 2025, Washington, DC
[Click for more information and registration](#)



SEPTEMBER 2025

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!



Interested in becoming a Sponsor for 2025-2026? Visit our Sponsor Form for more information or email 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 for inquiries

SEPTEMBER 2025