

JOIN US FOR OUR BREAKFAST MEETING


OCT 16



“Where Good Estate Planning Equals Poor Elder Care Planning AND a Medicaid Update”

Speaker: Elizabeth Forspan, Esq.
Partner, Forspan Klear LLP

 **The Bristol Assisted Living at Garden City**
1001 Axinn Ave, Garden City, NY 11530

 **8:00am – 10:00am**
Breakfast and Program

[CLICK HERE TO RSVP ONLINE BY OCTOBER 13th](#)

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

Thank you to our CLE facilitator, Rivkin Radler!

 [View Speaker Bio](#)

 [View Speaker Materials](#)

Learning Objectives: (1) Gain an understanding of the basic current estate tax atmosphere (2) Gain an understanding of the 2025 Medicaid updates (3) Understand the difference between estate planning and Medicaid planning (4) Understand why sometimes good estate planning might yield poor elder care planning results and how to plan around that for your clients

CLE credit sponsored by Rivkin Radler, LLP – NYS CLE Accredited Provider
This course is intended for experienced attorneys only
1 Credit in Professional Practice

Prerequisite: None
Level of Knowledge: Intermediate

Recommended CPE credit: 1 credit in the Advisory Services area.
New York State Sponsor Identification Number: 002917

Teaching Method: Live
Advanced Preparation: None

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

Pat Rafanelli Launches New Venture

Council Member Pat Rafanelli has co-founded Legacy Valuation & Forensics, a new firm providing valuation and forensic accounting services.

[Click to read more 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!



**JESSE
SCHWARTZ**



**MICHAEL
CALCAGNI**



**MATTHEW
BURNETT**



**JENNA
BAILLIE**



**ERIC
DOSTAL**



**SUSAN
AMINOV**



**TIMOTHY
HONCE JR.**



**WILLIAM
NUGENT**



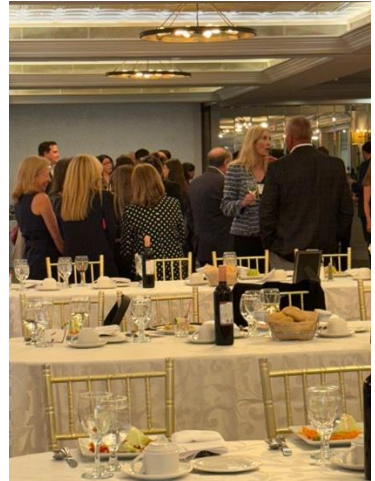
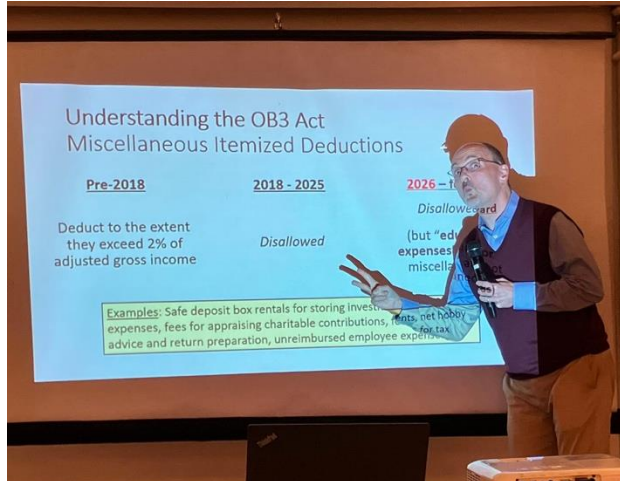
**MICHAEL
HOCHFELSEN**

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.

Photos from our PREVIOUS MEETING



Thank you to our featured speaker **Sam Donaldson** for an insightful and entertaining program at the council's Kickoff Meeting at the Volpe at Fox Hollow.





OCTOBER 2025

Please Mark Your Calendars
UPCOMING EVENTS



 Breakfast Meeting Dinner Meeting Study Group/Other

OCT 16 - 8:00am	"Where Good Estate Planning Equals Poor Elder Care Planning" AND A Medicaid Update - Elizabeth Forspan, Esq.
NOV 12 - 3:00pm	Study Group/NAEPC Live Webinar Paul R. Greenwood, JD, LL.B.
NOV 20 - 5:30pm	"The Last Chapter: Supporting Clients Through End-of-Life Planning. How to Help Families Prepare with Compassion & Clarity" Moderator: Kerri Winans Kaley- Speaker Panel: Jill Monoson, Esq., Susan Caruso (Legacy Consultant Advisor), and Alison Frank (hospice presenter)
DEC 18 - 8:00am	"Serving as Trustee - Tips & Traps" Richard G. Chalifoux, JD, AEP, Raymond C. Radigan, JD and David Bamdad, Esq.
JAN 8 - 5:30pm	Evening Winter Social The Paramount- 370 New York Ave, Huntington, NY
JAN 22 - 5:30pm	"Don't Lien on Me" Tax Liens Scott Kestenbaum, Esq. & Jill Monoson, Esq. - Kestenbaum & Mark LLP
FEB 12 - 8:00am	"Heckerling Update" Kevin Matz, Esq.
MAR 19 - 5:30pm	"Administering Estates: Trusts with Difficult, Challenging or Unusual Assets" Brian D. Conboy & Elisa M. Pickel, Esq. - Fiduciary Trust International
APR 23 - 8:00am	"Surrogates' Court Update" Nassau & Suffolk County Surrogates
JUN 2 - 5:30pm	Annual Officers' Conferment Dinner 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](#)



OCTOBER 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](#)

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

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
Contact s1danziger@gmail.com for inquiries

OCTOBER 2025