

JOIN US FOR OUR DINNER MEETING

MAR 19



“Expect the Unexpected”

Administering Estates with Complex and Unusual Assets



Elisa M. Pickel, Esq. – *Fiduciary Trust International*

Brian D. Conboy, Esq. – *Fiduciary Trust International*



Volpe at Fox Hollow

7725 Jericho Turnpike
Woodbury, NY 11797



5:30pm – 8:00pm

Cocktails: 5:30pm

Dinner & Program: 6:30pm

[CLICK HERE TO RSVP ONLINE BY MARCH 16](#)

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

Thank you to our CLE facilitator, Rivkin Radler!

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!

**ASHLEY
CROKER**



Welcome to our first Student Member!

Ashley is our first Student Member, reflecting our Council's commitment to supporting and engaging the next generation of estate planning professionals.

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.

MEMBER UPDATES

MEMBERS IN THE NEWS



Jennifer Cona Appointed Chair of Long Island Alzheimer's and Dementia Center Board

Jennifer Cona, managing partner at Cona Elder Law in Melville, has been appointed chair of the board of trustees of the Long Island Alzheimer's and Dementia Center in Westbury.



Patricia Marcin Named JD Supra Top Author in Wealth Management

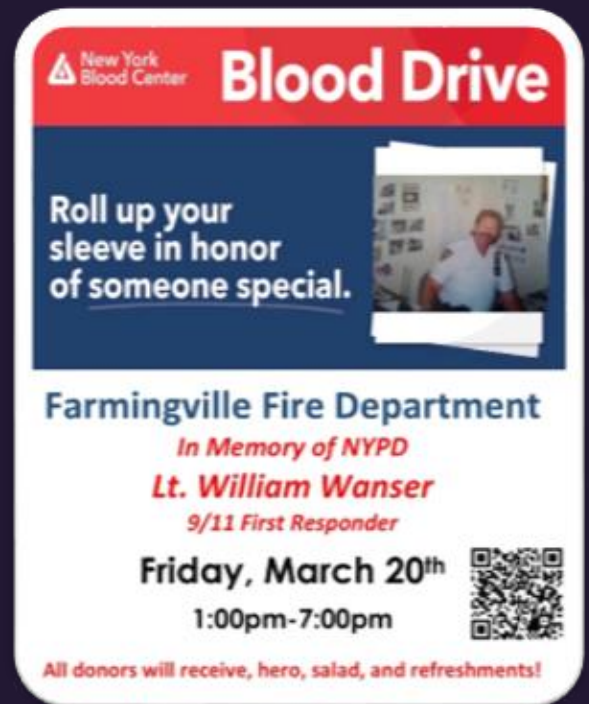
Patricia Marcin was named a 2025 Readers' Choice Award Top Author by JD Supra in Wealth Management. Selected from over 70,000 contributors for delivering insights that reached C-suite executives, in-house counsel, media, and other professionals. [Click to Read More](#)



Morgan Stanley's Chariot Group Named to Forbes Best-in-State List


Mark Mohtashemi's team, the Chariot Group at Morgan Stanley, has been named to the *Forbes Best-in-State Wealth Management Teams* list for the fourth consecutive year. [Click to Read More](#)

A blood drive will be held in memory of **Alyssa Danziger's** late father, William Wanser.




New York Blood Center **Blood Drive**

Roll up your sleeve in honor of someone special.



Farmingville Fire Department
*In Memory of NYPD
Lt. William Wanser
9/11 First Responder*

Friday, March 20th
1:00pm-7:00pm



All donors will receive, hero, salad, and refreshments!

William was a 9/11 first responder whose service and dedication continue to inspire. [RSVP Here to Donate](#)

Photos from our PREVIOUS MEETING

Pros of Type A Personality Traits

- Ability to complete tasks
- Tendency to be more direct
- Self-advocacy
- Goal-oriented mindset
- Resilience
- Self-driven and proactive in their pursuits

<https://www.forbes.com/health/mind/type-a-personality-traits/>

Cons of Being Type A

- Chronic stress, increased risk of burnout, anxiety
- Strained social relationships and challenges connecting with others on a deep level
- Difficulty delegating tasks
- Excessive self-criticism and feelings of inadequacy
- Difficulty with work-life balance
- Rigidity in thinking
- Increased risk of cardiovascular disease, hypertension, and sleep disturbances

<https://www.forbes.com/health/mind/type-a-personality-traits1>



Why is this topic important?

Please raise your hand if you know someone, or are someone, impacted by mental health challenges?



Thank you to **Martin Shenkman** and **Amanda Koplin** for an insightful Zoom meeting on “Lawyers, Financial Professionals and Mental Health Concerns: Making the Case for Change.”



The Culture of Silence:

But perhaps the most troubling data is that 6 out of 10 attorneys said that in the last six months they, at least sometimes, came across other legal professionals whose work responsibilities were affected by well-being, substance abuse, or mental health issues.

Bloomberg Law, 2014 Attorney Well-being Report

Statistics:

(ALM 2023 Mental Health Survey)

Nearly 3,000 lawyers answered questions related to well-being and the relation to law firms' culture and policies.

- **Pandemic stress, economic uncertainty, and billable hours pressure** have been a potent combination hindering mental health efforts in many law firms.
- **More than 50%** of the respondents said they felt increasingly cynical and a decreased sense of accomplishment.
- **60%** felt overwhelmed and exhausted.
- **More than 75%** said their work environment contributed to their mental health issues, with the top reasons being billable hours pressure, the 24/7 pace of the work, and client demands.

<https://www.forbes.com/sites/pauladavis/2023/05/18/lawyer-strong-the-legal-profession-journey-toward-well-being/?sh=638e93322b3a>

Psychological Safety

- When employees feel psychologically safe — or secure in taking risks, acknowledging mistakes or concerns, and engaging in difficult conversations — they are nearly **five times** more likely to be confident about their career progression and opportunities, the report said.
- Employees who feel supported by their managers are **nine times** more likely to say that work positively impacts their well-being, compared to those who don't feel supported.

<https://www.2civility.org/poor-lawyer-well-being-may-cost-firms-up-to-33m-survey-says/>



Please Mark Your Calendars
UPCOMING EVENTS



Breakfast Meeting



Dinner Meeting



Study Group/Other

MAR 18 – 3:00pm

STUDY GROUP/Webinar-
"The Death of the 60/40 Glidepath – and Crypto's Role in its Replacement"
Ric Edelman, CBDA

MAR 19 - 5:30pm

"Expect the Unexpected: Administering Estates with Complex and Unusual Assets"
Brian D. Conboy & Elisa M. Pickel, Esq. - Fiduciary Trust International

APR 22 – 3:00pm

STUDY GROUP/Webinar- "SLATs"
James I. Dougherty, JD

APR 23 - 8:00am

"Surrogates' Court Update"
Nassau, Suffolk, & Queens County Surrogates

JUN 2 - 5:30pm

Annual Officers' Conferment Dinner
Venue: Crescent Beach Club, Bayville, NY

JUN 17 – 3:00pm

STUDY GROUP/Webinar-
"The New Legacy: Strategic Estate Planning with Art & Collectibles"
Roberta Kramer

JUL 15 – 3:00pm

STUDY GROUP/Webinar- "Family Dynamics Under Stress: How Behavioral Patterns Shape Planning Conversations"
Arden O'Connor

AUG 19 – 3:00pm

NATIONAL EVENT: NAEPC Webinar: Complimentary Webinar: Title Coming Soon
Thomas A. Tietz, JD

SEP 23 – 3:00pm

NATIONAL EVENT: NAEPC Webinar: Complimentary Webinar: The Inside Scoop on the P&C Insurance Market
Michelle Hirsch, CAPI

**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.

SPONSOR SPOTLIGHT



KERRI WINANS KALEY
Director of Business Development

TELL US ABOUT ENCORE LUXURY LIVING AND THE BRISTAL ASSISTED LIVING

Encore Luxury Living & The Bristol Assisted Living are Premier Independent, Assisted & Memory care rental communities for 62 and over. Gorgeously designed apartments, impeccable dining experiences, common spaces for entertaining, daily housekeeping, transportation, wellness & fitness centers, plus exceptional amenities, and conveniences- all shared by likeminded neighbors. Robust calendar of social events all included in monthly rent. 24/7 concierge. Seniors Living their best life.

TELL US ABOUT YOU AND YOUR ROLE

Kerri Winans Kaley, Director of Business Development for Encore Luxury Living & The Bristol Assisted Living. We work with families, hospitals, physicians as well as rehabs to help families navigate the best options for long and short term stay in our communities. Our mission is to help those 62 and over live their BEST life. Encore Luxury Living is located in Jericho NY and we have 24 other Bristol Communities in NY, NYC, Westchester and New Jersey.

WOULD YOU LIKE TO SHARE SOMETHING PERSONAL ABOUT YOURSELF?

Kerri is a proud mom of three young men, and a wife. I have worked in healthcare for over 30 years. I feel blessed to be able to make a difference in someone's life. I am grateful every day. I am a resident of Cold Spring Harbor NY – went to college in VA and played women's Lacrosse in HS and College.

Contact Kerri at kwkaley@thebristol.com or kkaley@encoreluxuryliving.com

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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

MARCH 2026