

JOIN US FOR OUR BREAKFAST AND SEMINAR

APR 23



“Surrogates Update”



The Bristol Assisted Living
1075 Stewart Ave
Bethpage, NY 11714



Hon. **Cassandra A. Johnson**, Surrogate of Queens County
Hon. **Vincent J. Messina, Jr.**, Surrogate of Suffolk County
Hon. **David P. Sullivan**, Surrogate of Nassau County



Breakfast Meeting
8:00am – 10:00am

[CLICK HERE TO RSVP ONLINE BY APRIL 20](#)

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

Thank you to our CLE facilitator, Rivkin Radler!

GARY H. FRIEDENBERG SERVICE AWARD

In 2022 our council established the [Gary H. Friedenber Service Award](#) which is awarded annually in memory of our late beloved friend, long-time member, and past president of the Nassau County Estate Planning Council. It recognizes a member whose dedication and enthusiasm for our Council matches the spirit and friendship that Gary provided us for many years.



We are seeking nominations for this year’s recipient which will be presented at our Annual Officers’ Conferment Dinner at the Crescent Beach Club on June 2nd. Nominees should have contributed exceptional service to the Council and must be an Estate Planning Council of Long Island member in good standing to be considered.

All nominations must be received no later than May 1st, 2026.

[CLICK TO SUBMIT ONLINE!](#)

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

Jeffrey Gibraltar Joining Reid Forensic & Valuation

After 18 years at KLG, Jeffrey will be joining Reid as a Partner and Practice Leader, where he will be leading their forensic and valuation group (Reid Forensic & Valuation Group, LLC) Group, LLC.



Patricia Marcin Publishes Article on Trusts for Families

Patricia has published an article explaining why trusts are critical for families with minor children and how they provide control, protection, and long-term planning benefits. [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!



**HERMAN
ORTIZ**



**SHANIA
QUEEN**



**STEPHEN
STEWART**

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



Thank you to **Elisa Pickel** and **Brian Conboy** for “Expect the Unexpected” – an insightful guide to Administering Estates with Unusual Assets at Volpe at Fox Hollow.





APRIL 2026

Please Mark Your Calendars
UPCOMING EVENTS



Breakfast Meeting
 Dinner Meeting
 Study Group/Other

APR 20 – 3:00pm	<p><u>STUDY GROUP/Webinar- “SLATs”</u> James I. Dougherty, JD</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>
JUN 17 – 3:00pm	<p><u>STUDY GROUP/Webinar-</u> <u>“The New Legacy: Strategic Estate Planning with Art & Collectibles”</u> Roberta Kramer</p>
JUL 15 – 3:00pm	<p><u>STUDY GROUP/Webinar- “Family Dynamics Under Stress: How Behavioral Patterns Shape Planning Conversations”</u> Arden O’Connor</p>
AUG 19 – 3:00pm	<p>NATIONAL EVENT: <u>NAEPC Webinar: Complimentary Webinar: Title Coming Soon</u> Thomas A. Tietz, JD</p>
SEP 23 – 3:00pm	<p>NATIONAL EVENT: <u>NAEPC Webinar: Complimentary Webinar: The Inside Scoop on the P&C Insurance Market</u> Michelle Hirsch, CAPI</p>

Want to learn more about the council’s upcoming events?
 Check out our Events Page.

EVENTS PAGE



APRIL 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.

WE WOULD LIKE TO THANK OUR PLATINUM SPONSORS!



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Interested in becoming a Sponsor for 2025-2026? Visit our Sponsor Form for more information or email admin@epclongisland.com.

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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
Contact s1danziger@gmail.com for inquiries

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