



ESTATE
PLANNING
COUNCIL



MAY 2025

NEWSLETTER

JOIN US **JUNE 3rd** FOR OUR ANNUAL CONFERENCE DINNER



6/3/25 5:30pm | \$75 Per Person | RSVP Required



The Crescent Beach Club
333 Bayville Ave
Bayville NY, 11709



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

*See full invitation at the end of the newsletter for details!

WELCOME NEW MEMBERS

[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!



RONIT
ROGOSZINSKI



ERIK
GARY



AUDRA
LEWTON

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.



IN THE NEWS

The Council's own Lisa Rispoli was named to the Forbes "[Best in State: CPAs](#)" list. Created by Forbes editorial staff, this list is a compilation of the finest CPAs active in public practice.

Forbes

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
ZALONEY@HOTMAIL.COM



MAY 2025

PHOTOS FROM OUR PRIOR MEETING



Thank you to our featured speakers the **Hon. Margaret C. Reilly** and **Hon. Vincent J. Messina, Jr.** for an insightful Surrogates Update on April 24th at the Bristol of Jericho.





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MAY 2025

UPCOMING EVENTS

PLEASE MARK YOUR CALENDARS



Breakfast Meeting



Dinner Meeting



Study Group/Other

MAY 14

Wednesday, 5/14/25

STUDY GROUP- Webinar-"Strategies to Help Maximize Social Security Benefits"

Ash Ahluwalia, CFP®, MBA

Location: Virtual

JUN 3

Tuesday, 6/3/25

Annual Officers' Conferment Dinner

Venue: The Crescent Beach Club, Bayville, NY

Dinner Meeting: 5:30pm - 10:00pm

JUN 11

Wednesday, 6/11/25

STUDY GROUP- Webinar-" Look What You Made Me Do: A Checklist for Post-Mortem Tax Planning (Taylor's Version)"

Ashley L. Case, J.D., LL.M., Estate and Trust Law Certified Specialist, AEP, *Location: Virtual*

OCT 19

Sunday, 10/19/25

NATIONAL EVENT:

62nd Annual NAEPC Advanced Estate Planning Strategies Conference

STUDY GROUP WEBINARS

We are pleased to offer our members access to live webinars hosted by the National Association of Estate Planners & Council. These webinars provide valuable information and updates in various estate planning topics, to enhance your professional development and expertise. The next live webinars are:



- **Wednesday, May 14th, 2025 at 3pm: "Strategies to Help Maximize Social Security Benefits"**
- **Wednesday, June 11th, 2025 at 3pm: "Look What You Made Me Do: A Checklist for Post-Mortem Tax Planning (Taylor's Version)"**

Please check your email for registration information. If you are unable to attend this live webinar, look out for the email to access the recording, that will be available for convenient on-demand viewing. We encourage you to take advantage of this valuable resource to stay informed and engaged in the latest industry developments.

Should you have any questions, or need assistance accessing the webinars, contact our Committee Chairperson, Christina Jonathan, Esq. cjonathan@jaspanllp.com 516-393-8267.

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

EVENTS PAGE



ESTATE
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OF LONG
ISLAND



MAY 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.

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COUNCIL LEADERSHIP

We thank our officers, board members, committee chairs, and participants for their commitment and leadership on behalf of our council and for the benefit of our members. If you are interested in sharing your time and talents, please consider joining a committee.

[VIEW OUR COMMITTEES](#)



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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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OF LONG
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Thank you to our
Annual Officers
Conferment
Dinner Sponsor

The New York
Community Trust

Join Us On **JUNE 3rd, 2025**
FOR OUR ANNUAL DINNER

The Estate Planning Council of Long Island Invites you to join us for an evening of Dinner, Open Bar, Live Music, DJ and Dancing to celebrate our Annual Officers' Conferment.



RSVP BY MAY 23rd

[Click Here to RSVP Online](#)



The Crescent Beach Club
333 Bayville Ave
Bayville NY, 11709



6/3/25 5:30pm | \$75 Per Person | RSVP Required



Cocktails and Hors D'oeuvres
with Live Music on the Beach Patio
5:30pm - 7:00pm



Dinner, Entertainment, & Program
7:00pm - 10:00pm

*Live Music by Al Smith & Entertainment by DJ Tommy

Reserved tables of 8 or more are available upon request.
Contact Lisa Maloney at zaloney@hotmail.com

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2024-2025 Sponsors**

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**Winner of the NAEPC Council of
Excellence Award 2024-2025**

