

## Summary of Workshops

# Senior Law Day



<b>Time</b>	<b>Title</b>	<b>Room</b>
<b>10 a.m.</b>	Elder Law 101	Main Hall
	Advance Funeral Home & Cemetery Planning	A
	Solo Aging: Perspective from the Professionals	B
	Smart Seniors: Don't Get Scammed	C
	Understanding Your Social Security Benefits	D
	Online Health Research Tools: Find what you need. Know What to Look For	Hall of Fame
<b>11 a.m.</b>	Your Estate Planning Package	Main Hall
	Seven Gaffes in Estate Planning and What to do Instead	A
	I Should Avoid Probate, Right?	B
	What If's: Financial Planning for Retirement, Housing & LTC	C
	Making Medicare Work for You: Maximizing Your Options	D
	Practical Guidance: Q&A with Experienced English and Spanish Speaking Professionals	Hall of Fame
<b>Noon</b>	Power of Attorney and Advanced Directives	Main Hall
	Nuts and Bolts of Medicaid Planning	A
	Long Term Care Options	B
	Aging Adults & Estate Planning: How to Start the Conversation	C
	Navigating Care - Choosing Wisely to Age Well	D
	The Best and Most Affordable Housing Options as you Age	Hall of Fame

Note: ALL Workshops will take place in the first-floor seminar rooms on the East side of the building except where noted.

# Workshop Detail

## 10 AM WORKSHOPS

### **Title: Elder Law 101**

**Time: 10 AM**

**Room: MAIN HALL**

**Speaker(s):** David A. Cutner, Esq., Lamson & Cutner, P.C.

**Description:** This session will provide an overview of necessary legal documents, advanced directives, types of trusts, assets preservation techniques, long term care and incapacity planning, and methods to avoid or minimize estate and gift taxes. We will also cover an overview of Medicaid Planning, how to save for children/grandchildren, and tax considerations for seniors.

### **Title: Advance Funeral Home & Cemetery Planning**

**Time: 10 AM**

**Room: A**

**Speaker(s):** Mary Lou Morgan, Woodlawn Cemetery & Conservancy  
Tatyana Fowler, Ballard-Durand Funeral & Cremation Services

**Description:** This workshop helps individuals and families navigate funeral home and cemetery planning before the need arises. Led by industry professionals, it will cover funeral and burial options, the roles of each provider, pre-planning benefits, and how to make informed decisions for yourself or a loved one. Gain peace of mind, reduce emotional stress, and ensure final wishes are honored with care.

### **Title: Solo Aging: Perspective from the Professionals**

**Time: 10 AM**

**Room: B**

**Speaker(s):** Amy Jo Neill, The ANA Group  
Asha Paulose, Esq., Law Office of Asha Paulose

**Description:** Many people are facing aging more independently than in past generations, due to lifestyle choice/circumstance or the recent death/relocation of a loved one. Our panel of professionals will present a menu of issues to consider, including assembling a team of advisors/caregivers, setting up advanced directives and funding long-term care.

### **Title: Smart Seniors: Don't Get Scammed**

**Time: 10 AM**

**Room: C**

**Speaker(s):** Andy Aujla, Assistant Attorney General-in-Charge | New York State Office of the Attorney General | Westchester Regional Office

Christine Hatfield, Assistant District Attorney, Westchester County District Attorney's Office

Timothy Idoni, Westchester County Clerk

Sheldon L. Pollock, Regional Director, U.S. Securities & Exchange Commission

**Description:** The program will focus on common scams and frauds that targets older adults - the warning signs, how to avoid becoming a victim, and where to seek help if you think you are a victim. There will be special emphasis on common telephone scams such as the "grandparent scam," the "Internal Revenue Service scam" and the "foreign lottery scam."

**Title: Understanding Your Social Security Benefits**

**Time: 10 AM**

**Room: D**

**Speaker(s):** Joanna Rrezja CFP, Financial Advisor, The Westchester Group; Morgan Stanley Wealth Management

**Description:** This presentation will discuss the financial considerations to be made when deciding to take your Social Security Benefits and emphasize the importance of proper timing. Many Americans think Social Security is simple and straightforward, often it is not.

**Title: Online Health Research Tools: Find what you need. Know What to Look For (NEW)**

**Time: 10 AM**

**Room: Hall of Fame**

**Speaker(s):** Elena Falcone, M.L.S., Outreach Team at Westchester Library System

**Description:** In this session, you will learn about websites that provide especially useful information on health topics, including how to research providers and services. Explore strategies for effective searching in the age of AI.

## **11AM WORKSHOPS**

**Title: Your Estate Planning Package**

**Time: 11 AM**

**Room: Main Hall**

**Speaker(s):** Brian L. Miller, Esq., Partner, Certified Elder Law Attorney

**Description:** In this session, we'll cover the essential estate planning documents everyone should have and how often they should be updated. The speaker will discuss key tools used during life—like a Power of Attorney and Health Care Proxy - as well as those used after death, including a Last Will and Testament and Disposition of Remains. We will also discuss revocable and irrevocable trusts to help clarify their roles in the planning process.

**Title: Seven Gaffes in Estate Planning and What to do Instead**

**Time: 11 AM**

**Room: A**

**Speaker(s):** Joanna Feldman, Esq., Partner, Maker, Fragale & Di Costanzo, LLP

**Description:** In this workshop, we will explore some often-held misconceptions about aspects of estate planning in such areas as basic estate planning documents, designating beneficiaries, estate administration (including Probate), estate tax planning, and planning for long-term care. The presenter will provide practical suggestions on moving forward with a new or updated estate plan.

**Title: I Should Avoid Probate, Right?**

**Time: 11 AM**

**Room: B**

**Speaker(s):** Joseph Accetta, Esq., Court Attorney / Referee, Supreme Court – Westchester County, Adult Guardianship Part

Alan Feller, Esq., President, The Feller Group, P.C.

Rita K. Gilbert, Esq., Member, Hyman & Gilbert

**Description:** Wondering if you should avoid probate in your estate plan? Join us for an informative session with two Trusts and Estates attorneys who will break down the advantages and disadvantages of probate vs. revocable/irrevocable trusts. This workshop will give you insights to help you make informed decisions about your estate planning strategy.

**Title: What If's: Financial Planning for Retirement, Housing & LTC**

**Time: 11 AM**

**Room: C**

**Speaker(s):** Sara Meyers, Esq. CELA, Enea, Scalan & Sirignano, LLP  
Joseph Soricelli AIFA, CMP, Aging Solutions Management

**Description:** The “What-ifs” create questions and concerns in all our lives. This session will explain how creating a financial plan is essential for making informed decisions and answering the questions “What if?” in retirement.

We will help address concerns such as the risk of outliving one's savings, inheritance considerations for children, the impact of long-term care needs on financial stability, and planning housing options as we age.

**Title: Making Medicare Work for You: Maximizing Your Options (NEW)**

**Time: 11 AM**

**Room: D**

**Speaker(s):** Certified Counselor TBA

**Description:** Join this workshop to understand 2026 updates to Medicare Prescription Drug Plans (Part D), Medicare Advantage Plans (Part C), Medigap supplemental insurance, and other government benefit programs that can help lower your out-of-pocket costs. Medicare beneficiaries risk losing hundreds of dollars by not reviewing their plan options annually—don't make this costly mistake! Gain the crucial information you need to make confident, informed choices for the year ahead.

**Title: Practical Guidance: Q&A with Experienced English and Spanish Speaking Professionals (NEW)**

**Time: 11 AM**

**Room: Hall of Fame**

**Speaker(s):** Kelly Chiarella, Yonkers Office for the Aging  
Kristine Garcia-Elliott, Vishnick McGovern Milizio LLP  
Adam Rude, CFP, CIMA, RMA, Stratos Private Wealth  
Kadeen Wong, Esq., Law Office of Kadeen Wong

**Description:** Come to this session with questions for our attorneys, financial planners, and health care professionals. We expect questions related to Medicaid, when to redo a Will, when and if to go through Probate, caregiving, social security, and much more. We will also have a Spanish-speaking attorney on hand for the benefit of some of our constituents.

**12 PM WORKSHOPS**

**Title: Power of Attorney and Advanced Directives**

**Time: 12 PM**

**Room: Main Hall**

**Speaker(s):** Joseph Accetta, Court Attorney | Referee, Supreme Court –Westchester County, Adult Guardianship Part

Robert Arbuco, Esq., Attorney, Enea, Scanlan & Sirignano LLP

Roberta Goodman, Esq., Sr. Staff Attorney, Elder Justice Unit, Pace Women's Justice Center

**Description:** This workshop will cover the basics of having a Power of Attorney in New York, including the different options and the role of the agent. We will also cover the legal and practical issues regarding health care proxies.

**Title: Nuts and Bolts of Medicaid Planning**

**Time: 12 PM**

**Room: A**

**Speaker(s):** Samantha A. Lyons, Esq., Falcon Rappaport & Berkman LLP

**Description:** This workshop exams the basics of Medicaid planning, including asset protection, the Medicaid Home Care Program, pooled income trusts, and how to qualify for Medicaid in a Skilled Nursing Facility.

**Title: Long Term Care Options**

**Time: 12 PM**

**Room: B**

**Speaker(s):** Deepankar Mukerji, Esq., Deepankar Mukerji PLLC

**Description:** This workshop will present the various options for financing long term care, including what's available from Medicare, the basics of Medicaid planning, and the use of long term care insurance. We will also discuss the New York State Partnership policies and hybrid or combination policies.

**Title: Aging Adults & Estate Planning: How to Start the Conversation**

**Time: 12 PM**

**Room: C**

**Speaker(s):** Irma Ninetz, Esq., Partner, McCarthy Fingar LLP

**Description:** During this session, we will discuss how to start conversations with adults (aging parents/spouses/partners/siblings/friends) about estate planning and related issues. How, where, and with whom do you start conversations about wills, trusts, powers of attorney, health care proxies and living wills, and/or financial assets, and what do those conversations entail? We will discuss planning issues for today and ways to avoid estate litigation in the future.

**Title: Navigating Care - Choosing Wisely to Age Well**

**Time: 12 PM**

**Room: D**

**Speaker(s):** Anne Sansevero, RN, MA, Co-Founder Holistic HomeCare Associates Past President of the Aging Life Care Association

**Description:** In this workshop, we will explore key trends shaping the aging landscape and examine the full range of home care service options available to support a loved one. We'll also highlight the vital role a professional care manager can play in coordinating care and guiding families through complex decisions when a loved one can no longer manage independently.

**Title: The Best and Most Affordable Housing Options as you Age**

**Time: 12 PM**

**Room: Hall of Fame**

**Speaker(s):** Melinda Bellus, Esq., Legal Services of the Hudson Valley

Mario L. Martirano, CRMP, Certified Reverse Mortgage Professional

**Description:** This program will explore a range of home and community-based housing options, including innovative approaches that enable seniors to remain in their own homes. Topics will include HUD-subsidized housing, rent-stabilized housing, the Section 8 voucher program, and seniors' rights in any rental housing. Presenters will also cover assisted living and continuing care retirement communities as additional options for older adults.