



MAY 2026

Join us for our

# ANNUAL DINNER



Join us on June 2<sup>nd</sup>

PLEASE RSVP BY  
May 22<sup>nd</sup>

## For Our Annual Conferment Dinner

CLICK TO RSVP ONLINE



**The Crescent Beach Club**  
333 Bayville Ave Bayville NY, 11709

DATE  
June 2, 2026

TIME  
5:30 PM

TICKET  
\$80 per Person

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.

5:30 PM – 7:00 PM

**Cocktails and Hors D'oeuvres**  
With Live Music on the Beach Patio



7:00 PM – 10:00 PM

**Dinner and Program**  
Annual Officers' Conferment Ceremony

\*Live Music by Al Smith & Entertainment by DJ Tommy

## WE WISH TO THANK OUR 2025-26 SPONSORS!

PLATINUM SPONSORS:

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Winner of the NAEPC Council of Excellence Award: 2016, 2018, 2022, 2023, 2024, & 2025

Reserved tables of 8 or more are available upon request.  
Contact [admin@epclongisland.com](mailto:admin@epclongisland.com) for more information.

CONTACT  
[ADMIN@EPCLONGISLAND.COM](mailto:ADMIN@EPCLONGISLAND.COM)

## MEMBER UPDATES

### MEMBERS IN THE NEWS

#### Celebrating a Remarkable Career



Congratulations to **Patricia Robles** on her well-deserved retirement after an incredible **37-year career at BNY Mellon!**

Pat's professionalism, leadership, and dedication have left a lasting mark—both at BNY Mellon and within our **Council**. As a **past president of the Estate Planning Council of Nassau**, she has been a true leader and contributor to the profession, giving generously of her time and expertise.

Wishing Pat all the best in this exciting next chapter and a retirement filled with health, happiness, and new adventures!



Lisa Rispoli was named to Forbes 2026 List of Best-in-State CPAs



[Click to Read More](#)

### WELCOME NEW MEMBERS TO THE COUNCIL

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!



**MAYLAN**   
**STUDART-ANDERS, CFP®**  
Merrill Lynch Wealth Management

#### MEMBER PORTAL

Remember to visit the Council's Member Portal and keep your profile up-to-date

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  
**APRIL 23<sup>RD</sup> MEETING**



Thank you to our **Surrogates:**  
**Hon. Cassandra A. Johnson**  
**Hon. Vincent J. Messina, Jr.**  
**Hon. David P. Sullivan**

For an insightful update at our  
 Council's April 23<sup>rd</sup> Breakfast  
 Meeting at The Bristol  
 Assisted Living in Bethpage





MAY 2026

Please Mark Your Calendars  
**UPCOMING EVENTS**



*Breakfast Meeting*
 *Dinner Meeting*
 *Study Group/Other*

<b>JUN 2 – 5:30pm</b>	<p><b><u>Annual Officers’ Conferment Dinner</u></b>            Venue: Crescent Beach Club, Bayville, NY</p>
<b>JUN 17 – 3:00pm</b>	<p><b><u>STUDY GROUP/Webinar-</u></b>  <b><u>"The New Legacy: Strategic Estate Planning with Art &amp; Collectibles"</u></b>            Roberta Kramer</p>
<b>JUL 15 – 3:00pm</b>	<p><b><u>STUDY GROUP/Webinar- "Family Dynamics Under Stress: How Behavioral Patterns Shape Planning Conversations"</u></b>            Arden O'Connor</p>
<b>AUG 19 – 3:00pm</b>	<p><b><u>NAEPC Webinar: Complimentary Webinar: Title Coming Soon</u></b>            Thomas A. Tietz, JD</p>
<b>SEP 23 – 3:00pm</b>	<p><b><u>NAEPC Webinar: Complimentary Webinar: The Inside Scoop on the P&amp;C Insurance Market</u></b>            Michelle Hirsch, CAPI</p>
<b>OCT 21 – 11:00am</b>	<p><b><u>NAEPC Estate Planners Forum</u></b>            Samuel A. Donaldson, JD, LL.M., AEP® (Distinguished), Lawrence J. Rybka, JD, CFP®, AEP® (Distinguished), Jamie P. Hopkins, JD, MBA, LL.M., CLU®, ChFC®, CFP®, RICP®, and Natalia K. Gentry, JD</p>

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

**EVENTS PAGE**



MAY 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!**



**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](mailto:admin@epclongisland.com).

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**Study Group**  
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**Digital Media & PR**  
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**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](mailto:s1danziger@gmail.com) for inquiries

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