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2019

Women in Professional Services

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WHO'S WHO

Women in Professional Services

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Women in Professional Services

Long Island business women are powerful and determined. Their leadership and innovation spark the region's growth. In this Who's Who in Women in Professional Services, a diverse group of female business professionals discuss what they are focusing on for the advancement of their company and clients.

— Lisa Morris Josefak

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STEPHANIE M. ALBERTS
Forchelli Deegan
Terrana LLP



Stephanie M. Alberts is a partner in Forchelli Deegan Terrana LLP's Tax, Trusts & Estates practice group in Uniondale. Alberts has extensive experience in the areas of estate administration, estate planning, estate litigation, guardianships in both Supreme and Surrogate's Court, and tax matters.

Alberts represents individuals in various proceedings in the Surrogate's Court, including probate and administration proceedings, contested probate matters, judicial accountings, discovery proceedings, guardianship matters, and miscellaneous proceedings relating to estates and trusts. Her work includes the preparation of probate and administration documentation, assisting with the estate administration process, preparing estate tax returns, analyzing legal issues, conducting pre-trial discovery and depositions, completing legal research and drafting litigation documents. In addition to Surrogate's Court matters, Alberts represents clients in Article 81 guardianship matters in the Supreme Court.

A large part of Alberts practice is estate planning.

"At the forefront of my practice is a focus on the client," she said. "As part of that focus, I concentrate on keeping current with changes to the tax law so that I can provide cutting-edge estate planning strategies."

"I also encourage clients to re-visit their estate plan every few years or when a significant life-event occurs and impress upon them that an estate plan is not static — it may require changes not only as the tax laws change but also as life changes — so that their goals may be achieved," Alberts noted.

Alberts frequently writes on topics related to estate matters. Articles which she co-authored, "Substituted Judgment: Looking Out for an Elderly Person Who Becomes Incapacitated" and "Draft Once, Proofread Twice: Take Extreme Care in Formulating Personal Property Bequests," were published in the New York Law Journal.

Alberts has been selected as a New York Super Lawyer Rising Star annually since 2013. In 2016, she was honored by Hofstra University with the "Outstanding Women in the Law" Award.

Alberts earned a juris doctor, cum laude, from St. John's University School of Law and a bachelor's degree from Binghamton University, The State University of New York. She is admitted to practice in the states of New York and New Jersey.

Alberts is a member of the New York State Bar Association, American Bar Association, Nassau County Bar Association and Estate Planning Council of Nassau County.

Founded in 1976, Forchelli Deegan Terrana LLP (FDT) is one of Long Island's largest and most distinguished law firms. The firm employs 60 attorneys across more than a dozen practice groups. FDT is committed to providing exceptional service to a broad range of national, regional and local clients.

AMY F. ALTMAN

Abrams,
Fensterman,
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Carone, LLP



Amy F. Altman is a partner at Abrams, Fensterman, Fensterman, Eisman, Formato, Ferrara, Wolf & Carone, LLP in the firm's Trusts & Estates Law Practice Group. Altman focuses on estate litigation matters such as probate contests, discovery proceedings, accounting proceedings and other miscellaneous litigation related to trusts and estates. She has also been appointed as a guardian ad litem, by various surrogates in several counties to represent minors, unknown heirs and incapacitated individuals.

Altman is sensitive to the needs of each individual client. She provides them with the time and attention and the tools to understand how to best navigate their matter within the Surrogate's Court.

Altman drafts a variety of estate planning documents such as wills, trusts, health care proxies, powers of attorney and living wills and disposition of remains. She also advises clients on the issues that may arise from administering an estate in addition to their potential tax consequences.

Altman is a contributor to *Trusts & Estates* magazine, Law.com, the *New York Law Journal* and the New York State Bar Association Trusts and Estates newsletter. She has presented to the New York State Bar Association on topics including Lifetime Gifting and Special and Alternative forms of Letters in Surrogate's Court.

Altman earned a bachelor's degree from New York University and a juris doctor from Brooklyn Law School. She is admitted to practice law in New York and New Jersey.

Abrams Fensterman is one of the largest full service law firms based in Lake Success. The firm serves clients throughout the New York metropolitan area from offices in Long Island, Manhattan, Brooklyn, and serve upstate New York from our Rochester office. The firm is a leader in representing health care providers in all aspects of health care law. In addition the firm has law departments chaired by recognized leaders in their fields in areas such as matrimonial and family law, mental health law, corporate and securities, estate planning and administration, commercial litigation, guardianship law, employment law, real estate law, elder law, transportation law, health care fraud and white collar criminal defense.

ELIZABETH GOUSSE BALLOTTE
Grassi & Co.



Elizabeth Gousse Ballotte is a principal with in the not-for-profit practice area and leader of the new Grant Compliance Services team at Grassi & Co. Ballotte has more than 15 years of operational and organizational consulting and management experience and specializes in developing and performing grant compliance reviews, new business initiatives, internal control reviews and M&A implementations. She has experience in federal grant compliance, benefits

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analysis, financial analysis and research.

Within the not-for-profit industry, there has been an increased need for compliance for private foundations and other funders, Ballotte said.

"In response to that need, I joined the firm and added a Grant Compliance Services team to our NFP practice," she said. "These services assist funders, typically private foundations, by evaluating the programmatic impact of their donations to not-for-profits to ensure that actions are in alignment with the entity's stated mission and the funds are utilized for the agreed to purpose. The reviews offer greater assurance to the funders that the grant programs are operating efficiently and successfully, and are in compliance with the grant."

Prior to joining Grassi, Ballotte was affiliated with another mid-sized accounting and consulting firm in New York and prior to that, a consulting firm in Boston, MA, where she served as vice president.

Her engagements have required her to perform internal control reviews, operational assessments and grant compliance monitoring on a national scale. Ballotte has specifically been involved with engagements that review the processes and controls in the areas of: organization and operational reviews, grant monitoring and administration, due diligence reviews, cash management, payroll and time reporting, accounts payable and financial reporting.

Ballotte has co-authored several articles including "Tapping into the Nonprofit Next Generation: Pitfalls and Best Practices for Engaging Millennials at Your Nonprofit" and "Fundraising Goes Digital—Why Nonprofits Are Adding Crowdfunding Platforms to Their Giving Strategies." Both articles were published in *Non-*

Profit Pro. She was also published in *EXEMPT* magazine in an article entitled, "Talking Board Audits: 10 Critical Questions Board Members Should Ask."

Ballotte earned a master's degree in organizational development from the University of Rhode Island and a bachelor's degree in psychology from Smith College.

Grassi & Co. is a premier professional service organization specializing in auditing, tax, technology, and business consulting services. Grassi & Co. has offices in New York City, Long Island, White Plains, NY, and Park Ridge, NJ as well as internationally through its association with Moore Stephens International. Grassi & Co. specializes in professional services for the not-for-profit, construction, architecture & engineering, financial services, private equity, life sciences, manufacturing & distribution, retail, technology, media & telecommunication, transportation, energy & natural resources, and healthcare industries, among others.



DR. PATRICIA BARRINGTON
The V.I.P. Life

Dr. Patricia Barrington is president and director of The V.I.P. Life in Central Islip, which equips individuals with tools to triumph over self-limiting beliefs that present themselves as

challenges and self-fulfilling prophecies that prevent them from living a life of joy, abundance and freedom.

Dr. Barrington has been a speaker and women's empowerment coach for 17 years.

She has worked diligently to transform her communication skills to achieve victory, influence and power with her children, spouse and colleagues in the workplace. As a minister, her work in missions affirmed her calling helping her to come to the realization that she can have a positive impact in the lives of women and the next generation. On or off the mission field, she is dedicated to leading women to self-empowerment by becoming educated and living life on purpose.

As a result of her self-exploration, along with her work with female audiences, she has mapped out the 9 Steps to Speak Your Mind "to help others decree their victory, assert their influence and assume their innate power, so they can design a V.I.P. life with freedom and on their own terms."

"To further effect lifelong change in the lives of my clients, I am focusing on a holistic approach to self-transformation incorporating the spiritual, emotional, mental, financial and relational aspects of wellbeing," Dr. Barrington said.

A speaker and philanthropic leader, Dr. Barrington is the author of "Breaking Generational Chains: A Woman's Guide to Freedom." In response to international demand for her life-changing subject matter, she has delivered keynote presentations in leadership conferences in the United States, Africa and across the Caribbean.

An educator, she coaches in New York City Region 9 and 10 school districts and has presented workshops for general and special ed-

ucation staff. Dr. Barrington's programs have been widely received by the school system. She facilitated the development of "Positive Behavioral Interventions" and "Supports for Leadership," underscoring her commitment to today's youth.

Dr. Barrington has been recognized by a nationally renowned women's organization and the Town of Islip for her work with women in poverty. Dr. Barrington is a frequent contributor to women's networking groups as evidenced by her recent designation as a Certified Professional Speaker by the Florida-based Women's Professional Network.



ANNE BRACKEN
Lewis Johs Avallone Aviles, LLP

Anne Bracken is a partner at the law firm of Lewis Johs Avallone Aviles, LLP (Lewis Johs) in Islandia. Bracken joined the firm in 2001 and was elected partner in 2012.

A litigator with more than 20 years of experience, Bracken has spent a significant part of the last 17 years defending physicians and hospitals in medical malpractice cases from inception to trial. For the last 10 years she has defended a local large hospital in a number of malpractice suits stemming from a variety of claims of medical negligence. Her repeated successes have led

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to many of her clients directing their malpractice carriers to assign their defenses to Bracken.

Bracken has also represented individuals and businesses in commercial litigation and has worked with other members of the firm in servicing those clients' transactional needs. While not limiting her commercial practice to any one area, she has spent significant time representing clients in the food and restaurant industry.

Lewis Johs is focused on obtaining earlier successful resolution of their cases, Bracken said.

"Oftentimes in our industry, the mindset is to wait until the time of trial to attempt to settle or resolve a case," she said. "While our most important goal is to obtain the best possible result for our clients, we consider resolving cases early on in order to save our clients time and money and to spare them any undue stress."

Prior to joining Lewis Johs, she was an associate in a Manhattan firm concentrating in medical malpractice litigation and served as an assistant district attorney for Kings County, where she tried numerous cases to verdict.

Bracken is admitted to practice in New York State in the United States District Court for the Eastern District of New York. She is a member of the New York State Bar association and Suffolk County Bar Association.

She serves on the Grievance Committee for the 10th Judicial District and the Bench/Bar Committee of the Suffolk County Bar Association.

Bracken earned a juris doctor from Brooklyn Law School and a bachelor's degree, cum laude, from Providence College.

Lewis Johs Avallone Aviles, LLP is a full service law firm with offices on Long Island and in New York City. Founded in 1993, Lewis Johs has grown from 4 to over 70 attorneys. From its

inception, the firm has steadily gained a reputation as a skilled and dynamic law firm capable of managing the most complex litigation, trial, transactional, real estate, corporate and appellate work. The success and abilities of its trial attorneys positions Lewis Johs to obtain the best possible result for its client, whether that means early resolution or a trial by jury.

**NANCY
BURNER, ESQ.**
*Burner Law
Group, P.C*



Nancy Burner, Esq. is the founder of Burner Law Group, P.C. established in 1995. Burner Law Group is a boutique law firm serving clients in all matters of elder law, estate planning, trust and estate administration, guardianship, and special needs planning. With offices located in Setauket, Westhampton Beach and Manhattan, the attorneys at Burner Law Group represent clients from the east end of Long Island through the boroughs of New York City.

Burner holds the designation of a Certified Elder Law Attorney (CELA), awarded by the National Elder Law Foundation as accredited by the American Bar Association. She is a member of the Elder Law and Trust and Estates sections of the New York State Bar Association, the Suffolk County Bar Association and the Real Property, Trust and Probate Committee of the American Bar Association.

Burner is focused on shining a new view on the "Third Age."

"We have childhood, adolescence, adulthood, middle age, and then what ...?" Burner said. "The oldest baby boomers turned 70, last year. This critical mass has the opportunity to re-define aging by using their unique wisdom and stories of success and failure rather than hiding behind the triumphs of their youth."

"Now that people are living longer, the Third Age is a term used to describe the period between middle age and old age," Burner noted. "This can be a time of growth and continued success. Many 50-year-olds could feasibly expect to live another 40 years. The question is: What will you do with all these years? For me, what's next is to use my voice, my time, and my resources to change the way we think, talk and live in our Third Age."

Burner is a past president of the Suffolk County Women's Bar Association and a past co-chair of the Suffolk County Elder Law Committee. She is a former five-term trustee for the Lawyers' Fund for Client Protection, a state administered agency, which was created to protect law clients from the misuse of their money by dishonest attorneys and to promote public confidence in the administration of justice in New York State.

For 11 consecutive years, Burner has been named as a Super Lawyer in the field of Elder Law. Super Lawyers, part of Thomson Reuters, is a rating service of outstanding lawyers from more than 70 practice areas who have attained a high degree of peer recognition and professional achievement. The annual selections are made using a patented multiphase process that includes a statewide survey of lawyers, an independent research evaluation of candidates and

peer reviews by practice area. As a Super Lawyer, Burner has also received this award in the Top Women Attorney category.

Burner frequently lectures on the legislative changes, financial implications and governmental benefits affecting the elderly and special needs population. In 2016, she was named as an Outstanding Woman in Law by Hofstra University School of Law Center for Children Families and the Law. Later that same year, she was named by *Manhattan* magazine as a Big Apple Entrepreneur winner.

Burner is admitted to practice law in the State of New York.

Burner earned a bachelor's degree, magna cum laude, from Stony Brook University. She graduated in the top 2 percent of her class, with distinction, from Hofstra University School of Law. In 2011, Burner returned to her alma mater as an adjunct professor, where she created their first law school course in elder law.

**PAMELA
CIANCIOTTA,
CPA**
Marks Paneth LLP



Pamela Cianiotta, CPA is a director in the Real Estate Group at Marks Paneth LLP where she provides auditing, accounting and consulting services to clients in commercial and residential real estate. Cianiotta has additional expertise in the auditing of pension plans, including ESOPs,

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Real estate taxes are a cost of doing business which can be the difference between a profit or a loss. Hiring experienced counsel, capable of both negotiating extremely favorable resolutions and also litigating these matters is absolutely critical in keeping taxes as low as possible. The partners of Herman Katz Cangemi & Clyne have spent decades developing reputations for vigilant advocacy throughout the State, including New York City, Long Island, the Hudson Valley, the Capital Region and western New York. Our clients benefit from our superior representation to consistently ensure that they pay only a fair and equitable share of the collective tax burden. This reputation transcends New York State, as clients rely on us to manage their national real estate tax portfolios.

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and her broad background includes working with clients in the home heating oil and wholesale/distribution industries.

Cianciotta has worked in public accounting since 1997. Throughout her professional career, she has provided her clients with a broad range of services including preparation of financial statements and projections, business planning and general review, assistance and consulting for the bookkeeping of complex transactions as well as assistance with day-to-day operations.

For many of Cianciotta's clients in the real estate industry, the new tax law continues to be a pressing issue.

"The complexity of the law and the initial changes it introduced in 2018 generated a lot of uncertainty, and now, as we continue to receive updates and guidance to some of the law's key provisions — such as the 199A deduction, Opportunity Zones and 163(j) regulations — my staff and I are dedicated to helping clients fully understand each new development," Cianciotta said. "Our goal is to help them make educated and strategic decisions that will have the most positive impact on their future."

Cianciotta earned a bachelor's degree in accounting from Molloy College. She is licensed in New York State and is a member of the American Institute of Certified Public Accountants and New York State Society of Certified Public Accountants.

Marks Paneth LLP is a premier accounting firm with origins dating back to 1907. With a team of nearly 700 professionals, the firm provides a full range of audit, accounting, tax and consulting services, with specialties in international tax, forensic accounting, litigation support, family office and financial advisory services.

Marks Paneth professionals deliver expert knowledge in a wide range of industries, including real estate, hospitality and restaurants; non-profit, government and healthcare; manufacturing, wholesale and distribution; theater, media and entertainment; high-net-worth; and financial and professional services. Headquartered in New York City, with offices in Woodbury and other major markets throughout the East Coast, Marks Paneth is ranked by *Accounting Today* among the 50 largest accounting firms in the nation and the top 10 in the Mid-Atlantic Region.



JENNIFER B. CONA, ESQ.
Genser Cona
Elder Law

Jennifer B. Cona, Esq. is founder and managing partner of Genser Cona Elder Law in Melville. Cona practices exclusively in the field of elder law, including representing older adults and their families in connection with Medicaid planning, preservation of assets, estate planning, estate litigation, probate and administration of estates, special needs planning, Veterans benefits and guardianships. Cona also founded the Health Care Reimbursement and Recovery practice group.

Cona is a State Certified Court Evaluator and Counsel to Guardians and Incapacitated Persons and is Accredited by the Department of Veterans Affairs.

Among her accolades, Cona has been named to the Super Lawyers list; named a New York Law Journal's Top Women in Law (Inaugural Class); and a Top 10 Legal Eagle.

She is a member of National Academy of Elder Law Attorneys (NAELA); New York State Bar Association, Elder Law and Trusts & Estates Sec-

tions; Nassau County Bar Association, Elder Law Section; and Suffolk County Bar Association, Elder Law Committee.

Cona sits on the legal advisory board and is chair of the board of trustees of the Long Island Alzheimer's Foundation. She is also a board member of United Way of Long Island and founder and co-chair of Senior Dreams Come True.

A leader in her field, Cona has been invited to speak on many news shows on WNBC-TV, WABC-TV, CNN-fn, NEWS 12 and others. She has also written many articles in major publications.

Cona earned a juris doctor, with honors, from the University of Connecticut School of Law and a bachelor's degree, cum laude and high honors, from William Smith College.

Celebrating over 20 years in practice, Genser Cona Elder Law is an award winning law firm. Its practice concentrates in the areas of elder law, estate planning, estate administration and litigation, special needs planning and health care law.

Genser Cona Elder Law is recognized for its innovative strategies, creative techniques and legal skills combined with unwavering tenacity that is focused on its paramount objective — "not just satisfying the needs of clients but exceeding expectations."

The firm's mission is to inspire and empower older adults to embrace aging with support and resources through a holistic approach to Elder Law. The firm provides thought leadership and delivers legal services to both families and the health care industry, finding innovative strategies and solutions to ensure our older adults receive quality care.



CARA CRONIN
Cronin & Cronin
Law Firm, PLLC

Cara Cronin is a partner at Cronin & Cronin Law Firm, PLLC and head of the firm's New York City office. Cronin has extensive experience representing commercial property owners in tax certiorari matters in Nassau County, Suffolk County, New York City and upstate New York.

There are a number of issues currently impacting commercial property taxes, Cronin said.

"The Nassau County assessment revaluation was implemented with a lot of problems and has resulted in uncertainty for many property owners," she said. "The retail market continues to evolve and our focus is on reducing the property tax burden for our clients as they fill vacancies left by the competition of e-commerce. Further, the impact of the change to the state and local tax deduction (SALT) will be seen this year and while this is a residential issue, it impacts the commercial communities on Long Island where our clients operate."

Prior to joining the firm in 2011, Cronin worked in Washington, DC at the National Republican Congressional Committee. She continues to be involved in politics and has acted as a consultant to several State Senate campaigns on Long Island.

Cronin is on the executive board of the Long Island Real Estate Group (LIREG), an organization that provides the real estate industry and allied trades with a platform for real estate-related charitable giving and networking.

She is also on the board of directors for The Safe Center Long Island (TSCLI), a creation of two former non-profit agencies that separately served victims of domestic abuse and child abuse.

LEWIS JOHS
Lewis Johs Avallone Aviles, LLP

Counsellors at Law

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Cronin is a former board member of the Nassau County Women's Bar Association (NCWBA) where she served as the Nassau Chapter Delegate. She was honored by the NCWBA in 2016 with the Bessie Ray Geffner, Esq. Memorial Award.

Cronin is a member of the New York State Bar Association, the New York City Bar Association, the Nassau County Bar Association and the Suffolk County Bar Association. She earned a bachelor's degree from Washington and Lee University and a juris doctor from the Maurice A. Dean School of Law at Hofstra University.

Cronin & Cronin Law Firm practices exclusively in the area of Tax Certiorari, protesting the real property tax assessment and condemnation for commercial properties throughout New York State. Its attorneys have extensive experience representing prominent developers, national tenants, and many of the largest properties in the State of New York. Cronin & Cronin Law Firm, based in Mineola, represents property owners in tax certiorari and condemnation proceedings in Nassau, Suffolk and Westchester Counties, as well as New York City and upstate New York.



Counsel to Moritt Hock & Hamroff LLP in Garden City, Michelle E. Espey advises clients on a broad range of tax matters, from representing individuals and business at all stages of Federal, State and City tax disputes to advising clients on the tax aspects of structured transactions. Espey's clients include high net worth individuals and closely held businesses. She also counsels nonprofit organizations on issues relating to compliance and tax-exempt status.

Espey has helped countless individuals become compliant with their U.S. tax obligations by means of the Internal Revenue Service's Off-shore Voluntary Disclosure Programs, Streamlined Compliance Procedures, Delinquent FBAR Submission Procedures and Delinquent International Information Return Submission Procedures. She counsels clients on FATCA compliance issues, information reporting and withholding obligations, and cross-border tax issues related to inbound transactions.

Espey regularly represents taxpayers before the Internal Revenue Service, New York State Department of Taxation and Finance, New York City Department of Finance, and the United States Tax Court.

"The U.S. Tax Cuts and Jobs Act of 2017 revamped U.S. income taxation by introducing a myriad of complex provisions, requiring tax professionals to interpret the law, review the reforms' impacts on individuals and businesses, and evaluate the emerging compliance risks," Espey said. "I am continuously reviewing the changes, so I can answer our client's questions and leverage the legislation to best suit their needs."

Espey also represents clients before the Pension Benefit Guarantee Corporation on matters concerning pension plan terminations, minimum funding deficiencies, excise tax and statutory liens.

She earned her juris doctor from Quinnipiac University School of Law and a bachelor's degree from College of the Holy Cross.

Espey is admitted to practice in New York and New Jersey and before the United States Tax Court.

Moritt Hock & Hamroff LLP, established in

1980, is a full-service, AV-rated commercial law firm with 21 areas of practice and 75+ attorneys. The firm is based in New York with offices on Long Island and in New York City and provides a wide range of legal services to businesses, corporations and individuals worldwide. Its practice areas include: alternative dispute resolution, business succession planning, commercial foreclosure, commercial lending & finance, construction, copyrights, trademarks & licensing, corporate & securities, creditors' rights & bankruptcy, cybersecurity, privacy & technology, employment, equipment & transportation leasing and finance, healthcare, landlord & tenant, litigation, marketing, advertising & promotions, mergers, acquisitions & private equity, not-for-profit, patents, real estate, tax and trusts & estates.

Espey serves as a contributing editor of tax law for the American Bar Association's *Business Law Today* publication. She is a member of the Nassau County Bar Association and a member of the American Bar Association's Tax Section and the New York State Bar Association.



Jacqueline Fackler, CPA is a senior tax manager at Berdon LLP in Jericho. With more than 25 years of experience in public accounting, Fackler advises on an array tax matters for clients in the real estate arena, as well the manufacturing and professional services sectors.

In a tax environment of almost unprecedented uncertainty, Fackler develops and refines tax deferral and reduction strategies that integrate both the business and the personal financial needs of clients. In this post-Tax Cuts and Jobs act world, wherever possible she leaves flexibility to enable clients to adjust as tax laws are revised, change, or expire.

Fackler also works with clients to identify tax savings opportunities that fit their particular circumstances and ways to reduce or limit exposure. Where possible, she alerts clients to potential tax law changes and how they can prepare, as well as to current and pending tax credits — advising on how they may qualify.

Working with some of the firms leading commercial and residential real estate clients, she helps to determine the tax consequences of real estate purchases. For family/closely held enterprises, she advises on techniques to preserve and enhance business and personal net-worth.

The most important thing any professional service firm can do to better serve clients is to maintain and continually develop quality professionals, Fackler said.

"Our people are our product," she said. "At Berdon, we train our people to strive for technical excellence, and regularly challenge them to help them grow. Just as important, we teach them to think like a businessperson, put themselves in our client's shoes, and understand their perspective and needs. In this way, they can be true advisors."

Fackler is a member of the American Institute of Certified Public Accountants and the New York State Society of Certified Public Accountants.

She earned a bachelor's degree in accounting and an MBA at St. Johns University with a concentration on taxation. She is a licensed certified public accountant in New York State.

Berdon LLP, with offices in Jericho and New

York City, is consistently ranked among the nation's top CPA and advisory firms. With more than 400 professionals and staff, clients can access a comprehensive array of accounting, tax, financial, and management advisory services.

Berdon advises on almost every aspect of a business at any stage of development — from startup through growth, diversification, and succession. Berdon is a recognized leader in advising the real estate industry and works with numerous businesses in the manufacturing and distribution sector, as well as high net worth individuals. If needs cross international borders, Berdon service extends worldwide through membership in TIAG, a global alliance of more than 115 independent accounting firms in over 65 countries.



Maryellen Ferretti is TD Bank's retail market manager for the Suffolk East Region.

Ferretti has worked in the banking industry for more than 16 years. Since graduating from Hofstra University Zarb School of Business, she has held various positions in banking including a licensed banker, assistant bank manager and bank manager.

Ferretti leads 14 retail bank managers and their teams driving customer service within the TD Bank network. She believes in giving back to where her teams work and live and encourages her teams to volunteer together in their communities. Ferretti enjoys mentoring financial education within the community. She has supported literacy in local elementary schools and volunteers to tutor in after school programs.

Ferretti has a passion for volunteering in anything related to education. She has volunteered with Junior Achievement, Island Harvest, NY Cares, & Commerce Plaza. She was also part of a program helping inmates and ex-convicts to prepare for job interviews.

TD Bank is one of the largest banks in the U.S., providing more than 9 million customers with a full range of retail, small business and commercial banking products and services at more than 1,200 locations throughout the Northeast, Mid-Atlantic, Metro D.C., the Carolinas and Florida. In addition, TD Bank and its subsidiaries offer customized private banking and wealth management services through TD Wealth®, and vehicle financing and dealer commercial services through TD Auto Finance.

TD Bank is headquartered in Cherry Hill, N.J. TD Bank is a member of TD Bank Group and a subsidiary of The Toronto-Dominion Bank of Toronto, Canada, a top 10 financial services company in North America.



Olga Fuchs has served as an IP paralegal at Collard & Roe, P.C. since 2017 when she joined the firm as part of a merger with Striker, Striker & Stenby. Fuchs has over 20 years of experience in

trademark and patent prosecution and maintenance, as well as extensive management experience.

Over the past two decades, Fuchs has witnessed how a technological revolution has transformed the IP industry.

"Gone are the days when IP professionals process paper patent and trademark applications onsite and express mail them to the Patent & Trademark Office (PTO)," she said. "Today, technology seamlessly integrates IP specialists and clients across the world. Collard & Roe, P.C. has embraced these changes by making all filings in the PTO electronically, by implementing a cloud-based document management system, and by moving towards a paperless office."

"These changes allow the firm to serve clients more expeditiously and effectively, reduce business costs, and operate more efficiently," Fuchs said.

Fuchs graduated, with honors, from Vladimir State Pedagogical University in Russia with an A.B. in Modern Languages, as well as in Teaching English and German as a Second Language.

Collard & Roe, P.C. is a boutique intellectual property law firm in Roslyn. The firm has specialized in patent, trademark, and copyright law since its founding in 1966 and has obtained more than 21,000 patents and 21,000 trademarks. Collard & Roe assists clients in prosecuting patent, trademark, and copyright applications, as well as in litigating patent, trademark, and copyright infringement cases. The firm also handles patent, trademark, and copyright licensing and protecting domain names and trade secrets.

Collard & Roe, P.C. supports innovation by filing patents and trademarks for clients ranging from local inventors to international corporations. The firm serves clients in the United States and throughout the world in all aspects of intellectual property in areas such as engineering, chemistry, computer programming, and biotechnology. From its historic involvement in the patenting of PVC (polyvinyl chloride) nearly 50 years ago, to its current involvement in advanced technologies, Collard & Roe, P.C. is prepared to handle any intellectual property law issue.



Patricia Galteri is managing attorney at Meyer, Suozzi, English & Klein, P.C. in Garden City and chairs the firm's Management Committee. Galteri is also chair of the firm's Wills, Trusts & Estates Department.

Galteri's practice includes the development of estate and family business plans to ensure the tax efficient transfer of wealth to the next generation while meeting the specific personal goals of her clients.

"In today's economy, I am focused on growing our practice areas with the very best legal talent so that we can continue to readily and cost-efficiently assist our clients, particularly in commercial litigations, corporate and real estate endeavors and with the anticipated surge of transitions of family businesses by baby boomer owners," Galteri said.

"I counsel our clients on the current estate tax law and the planning opportunities available under the historically high federal gift and estate tax exemption of \$11.4 million per person," she said. "I encourage our clients to avail themselves of these opportunities by the establishment of an array of trusts that could

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own family business, real estate and liquid assets and which are designed to minimize our clients ultimate income and estate taxes before the exemption reverts to \$5 million, indexed for inflation, at the end of 2025.”

Galteri also supervises the preparation of probate and administration documents, provides advice in the marshaling and preservation of estate assets, and is knowledgeable in all aspects of estate administration and post-mortem estate tax planning. Her in-depth knowledge of the preparation of federal and state estate tax returns enables her to defend positions on gift and estate tax returns under audit.

Galteri is called upon to appear in Surrogate's Court to provide counsel to fiduciaries and beneficiaries, in the interpretation of ambiguities in wills and trusts in construction proceedings and to participate in contested probate and accounting proceedings.

She was honored at The Premier Business Women of Long Island Awards Gala in 2019. In 2017, she received the Hofstra Outstanding Women in Law Award and in 2016-2017. Galteri was named to the New York Super Lawyers list as one of the top attorneys in New York.

Galteri earned a juris doctor from Hofstra University School of Law and a bachelor's degree from Hofstra University.

Among her memberships, Galteri is a member of the New York State Bar Association; Nassau County Bar Association; Suffolk County Bar Association; Nassau County Estate Planning Council; Long Island Community Foundation, Board of Advisors; and Northwell Health Systems, Gift Planning Advisory Committee.

Founded in 1960, Meyer, Suozzi, English & Klein, P.C. is a distinguished provider of legal services, with a reputation for integrity, insight and excellent client service. The firm's attorneys are committed to their clients, community, public affairs and diversity. With offices in Garden City, Manhattan and Washington, D.C., the firm provides legal advice in 16 practice areas.

CANDACE J. GOMEZ
Bond, Schoeneck & King PLLC



Candace J. Gomez is a member at the law firm of Bond, Schoeneck & King PLLC (Bond) in Garden City. Gomez represents school districts, private schools, colleges, universities, corporations and individuals. She has successfully represented clients in the courts of New York State, federal court, New York State Education Department impartial hearings, New York State Commissioner of Education appeals, and U. S. Department of Education, Office for Civil Rights (OCR) investigations.

Gomez has provided general counsel services and litigation services to some of the largest school districts and universities in New York State. Her experience includes policy development, contracts, school board

elections, employee disciplinary proceedings, student residency requirements, special education and student disciplinary hearings. She also has extensive experience defending clients in a variety of civil litigation matters.

Gomez routinely serves as an impartial investigator regarding employee complaints involving discrimination and harassment in the workplace. Her investigation experience includes matters involving claims of racial discrimination, ethnic discrimination, gender discrimination, sexual orientation discrimination and sexual harassment. In addition, Gomez assists employers with preventing discrimination and harassment complaints by conducting anti-harassment training sessions for employees. She also advises employers regarding the proper handling of situations before they become official complaints.

Gomez has been recognized as a Rising Star on the 2018 list of New York Metro Super Lawyers. She has conducted numerous seminars and workshops on various education law topics, including presentations for the Nassau County Bar Association, the Annual School Law Conference hosted by the Nassau and Suffolk Academies of Law, and the Annual School Attorney Law Conference hosted by the New York State Association of School Attorneys.

Gomez is chair of the Nassau County Bar Association Education Law Committee, and she is also a member of the Long Island Hispanic Bar Association (LIHBA) board of directors.

Gomez' early legal training includes an internship at Rolls-Royce, North America while attending law school. As an under-

graduate student at Tufts, she was selected as the commencement speaker of her graduating class.

With 250 lawyers and offices across New York State as well as one in Naples, Florida, and in Kansas City, Bond is a full-service law firm counseling individuals, companies, not-for-profits and public sector entities in a wide spectrum of practice areas.

Bond's Garden City office opened in 2004 with a contingent of well-respected labor and employment attorneys primarily representing public sector clients. Today, the office has grown to represent professionals, small and large businesses, banking and finance, real estate and construction, health care, higher education, high-tech, hospitality, manufacturing, municipalities, retail and transportation, as well as numerous school districts and special districts in labor matters.

The firm represents long term care providers in contract, commercial matters, employment law, and guardianships.

Bond helps clients address general business and transactional issues, education and health care law, labor and employment, employee benefits, OSHA and immigration, intellectual property, regulatory compliance, along with estate planning and probate proceedings.

Its attorneys appear in state and federal courts and before administrative agencies on a wide range of commercial issues, personal injury defense litigation (including Labor Law 240 construction cases) and numerous land use matters.

Among its many accolades, Bond has been named in 2019 U.S. News-Best Lawyers® "Best Law Firms" Statewide and Nationally.

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GINA HATAMI
Siler & Ingber, LLP



Gina Hatami is a senior associate at Siler & Ingber, LLP located in Mineola. Hatami is a recent addition to the firm with a strong career in litigating personal injury cases. Hatami has handled a variety of cases, including motor vehicle accidents, premises cases, municipal negligence, and complex labor law/construction accident cases among other areas of law. She has experience in all aspects of litigation and works hard to obtain the best results for her clients.

As a plaintiff personal injury attorney, Hatami strives to have her cases proceed efficiently to resolution.

"In real-world practice I am faced with road blocks on a daily basis in multiple forms that may cause delay in the resolution of cases," Hatami said. "These obstacles come in many forms like death or bankruptcy of a party; but, more times than not, it is due to the back log of cases in our court system, which is lacking resources to match the flood of litigation it experiences."

"In these trying times, I hold my adversaries accountable to the time-lines set by the courts and implore a more aggressive approach to achieve a swifter and more positive result for my clients," she explained.

Hatami is admitted to practice law in the New York State. She earned a juris doctor, cum laude, from Touro Law School, where she was a staff member of the International Law Review and received the Computer-Assisted Legal Instruction Award for Academic Excellence. She earned a bachelor's degree in criminal justice from the University of Maryland, College Park.

Siler & Ingber, LLP is a personal injury law firm representing Long Island and New York City clients who have been injured due to the negligence or recklessness of another party. The firm has recovered millions of dollars in verdicts and settlements fighting for the rights of their clients to get them the justice they need and deserve.

JENNIFER F. HILLMAN
Ruskin Moscou Faltischek P.C.



Jennifer F. Hillman is a partner at Ruskin Moscou Faltischek P.C., which is headquartered in Uniondale. Hillman's practice includes all manner of surrogate's court proceedings including accounting proceedings, probate contests, discovery proceedings, and commercial litigation related to estates. She practices in the surrogate's courts, as well as the trial and appellate courts throughout New York.

She also has substantial experience in trial and appellate advocacy, and has handled a variety of commercial cases including contractual disputes, restrictive covenants, unfair competition, partnership disputes and real estate litigation.

An increasingly digital world has created additional hurdles for estate planning and administration, Hillman said.

"Photographs are stored on photo-sharing websites, and many financial transactions are

handled online without ever entering a bank location," she noted. "As more people go 'paperless' there may not be a written record for family members to locate assets after an individual passes."

"Digital assets extend beyond accessing someone's Facebook account after death, and most companies fiercely guard against access to protect the privacy rights of deceased individuals," Hillman said. "Even if a family member is aware of an online password, unauthorized access to computers and data may violate some criminal and data privacy laws. Everyone needs to be aware of these issues."

Hillman is a fellow of the American College of Trust and Estate counsel (ACTEC). She is a member of the New York State Bar Association Trusts and Estates Section where she serves on the executive committee as an officer.

She formerly served as chair of the Estate Litigation Committee and co-chair of the Government Relations and Legislation Committee, where she actively assisted the Trust and Estates Section in promoting new legislation. Several of her own legislative proposals have been signed into law.

Hillman is a member of the Nassau County Bar Association where she serves as co-chair of the Surrogates Court Committee. She is a member of the Nassau County Women's Bar Association and is on the board of directors of the Nassau County Women's Bar Foundation.

Hillman has lectured on probate and trust issues to the New York State Bar Association, the New York City Bar Association and the Suffolk County Bar Association. She has co-written many articles for the *New York Law Journal*, and is a contributor to the Lexis Nexis Estate Practice and Elder Law Community on a variety of issues related to estate litigation.

Hillman earned a juris doctor from St. John's University and a bachelor's degree, magna cum laude, from Marist College.

For 51 years, Ruskin Moscou Faltischek P.C. has built a reputation as one of the region's leading providers of innovative legal services. Its attorneys are practical, experienced advocates who measure their success by their clients' success. Cornerstone groups in all major practice areas of the law are represented at the firm, including corporate and securities, financial services, commercial litigation, intellectual property, health care, real estate, employment, not-for-profit, cybersecurity and data privacy, energy, and trusts and estates. Clients include large and mid-sized corporations, privately held businesses, institutions and individuals.

KELLY JONES HOWELL
Harris Beach PLLC



Kelly Jones Howell is a partner at the law firm of Harris Beach PLLC and a member its medical and life sciences industry team.

Howell has a national litigation practice focusing on product liability with significant experience managing pharmaceutical, medical device and dietary supplement cases. She regularly serves as national coordinating counsel and New York/New Jersey counsel defending clients in state and federal courts, state-coordinated mass torts, class actions and federal multi-district litigation, involving FDA and EPA regulated products.

Representative clients include: manufacturers and distributors of brand-name and generic pharmaceuticals, medical devices, over-the-

counter medications, biologics, vaccines, dietary supplements, cosmetics and food; as well as manufacturers of consumer products, pesticides, laboratory chemicals, industrial equipment and building materials.

Howell also advises life science companies concerning pre-litigation risk assessments; recalls and market withdrawals; company submissions to FDA, including package inserts and other labeling; direct-to-consumer advertising; website and social media content; sales and training materials and pharmacovigilance. She also counsels clients in the dietary supplement and food industries on regulatory compliance with FDA and FTC regulations, including the federal Food, Drug, and Cosmetic Act and the Dietary Supplement Health and Education Act.

"Representing regulated industries like life science companies and health and human service providers, third-party risk management is always top of mind for my clients," Howell said. "Third-party interactions within highly regulated industries carry significant risk throughout a company's operations, including drug discovery and development, manufacturing and supply, sales and marketing, and operational and administrative support."

"The volume of interactions with business partners creates multiple risks regarding cybersecurity, indemnification, contract compliance, off-label promotion, kickbacks, relationships with clinical research organizations and contract manufacturers," she explained. "Regulated industries have increasingly requested their outside counsel take a greater role in evaluating risk in these agreements and partnerships."

Howell also handles general liability/negligence cases and business and commercial litigation, from premises liability and simple breach of contract disputes to complex litigation involving extensively detailed agreements.

Founded in 1856, Harris Beach and its subsidiaries provide a full range of legal and professional services for clients across New York state, as well as nationally and internationally. Harris Beach is among the country's top law firms as ranked by *The National Law Journal* and ranked as a BTI Elite law firm based on in-depth interviews of more than 600 corporate counsel at the world's largest and most influential companies. Clients include Fortune 100 corporations, privately held companies, emerging businesses, public sector entities, not-for-profit organizations and individuals.

Principal industries that Harris Beach represents include education, energy, financial, food and beverage, health care, insurance, manufacturing, medical and life sciences, real estate developers, science and technology, veterinary medicine, and state and local governments and authorities. The firm's more than 200 lawyers practice throughout offices in New York state in Albany, Buffalo, Ithaca, New York City, Rochester, Saratoga Springs, Syracuse, Melville, Uniondale and White Plains.

JENNIFER HOWER
Herman Katz Cangemi & Clyne, LLP



Jennifer Hower is a partner at Herman Katz Cangemi & Clyne, LLP (HKCC). Hower joined the firm in 2013, and concentrates her practice in the area of tax certiorari and condemnation. She has a diverse background and years of experience in the prosecution of real estate tax appeals. Hower has participated in valuation trials

of both commercial and residential properties, as well as condemnation proceedings against New York State.

Prior to concentrating in tax certiorari, Hower served as an assistant staff judge advocate with the United States Air Force both on active duty and as a reserve officer. There she prosecuted criminal matters on behalf of the United States, and handled military justice and environmental issues.

Howell earned a juris doctor from Franklin Pierce Law Center and a bachelor's degree in political science from the State University of New York at Buffalo.

She is a member of the Nassau County Bar Association (member, Committee on Tax Certiorari and Condemnation 2006-present; Publications Committee, 2007-2009); the Suffolk County Bar Association; the New York State Bar Association; the New Hampshire Bar Association; and the Long Island Builders Institute (LIBI). Hower also serves as the adjutant of the American Legion Robert H. Spittel Post 1285, Bayville, NY.

The partners of Herman Katz Cangemi & Clyne each have long standing and unique backgrounds and experiences throughout New York, as well as nationally, in the complex world of commercial real estate taxes. From its offices in midtown Manhattan, HKCC oversees and litigates a wealth of different properties throughout New York City, from major office buildings and hotels, to large retail projects and multifamily residential, to industrial and specialty property. From its headquarters in Melville, Long Island, HKCC handles a comparably diverse portfolio of real property tax appeals on Long Island, in Westchester County, and throughout upstate New York.

HKCC's industry-wide reputation for integrity provides the firm's clients with the confidence that they will receive skilled and trusted counsel through the multi-faceted and highly complex property tax valuation process. This involves more than just litigating tax appeals after an issue has arisen. It includes being involved from the underwriting and due diligence stages, providing forecasts and helping positioning properties to have as fair a property tax burden as possible from the date of acquisition or construction.

The firm represents clients at both the administrative and judicial levels throughout New York State, as well as providing additional assistance by overseeing properties throughout the country. HKCC has spent decades establishing its reputation in New York, and developing relationships nationwide to make sure the right expert is implicated in every jurisdiction. In this regard, the partners of HKCC act as outside property tax counsel for both national and international real estate operations and oversee portfolios across the United States.

KIMBERLY JAKUBOWSKI
EisnerAmper LLP



Kimberly Jakubowski is a manager in the Assurance and Technology Control Services Group at EisnerAmper LLP. A Certified Fraud Examiner (CFE), Jakubowski specializes in financial statement audits, Sarbanes Oxley compliance, internal control over financial reporting, and internal control assessment. Her clients include public companies, broker-dealers and manufacturing and distribution, retail, telecommunications, and client service companies.

Jakubowski spends a great deal of time focusing

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on helping clients — and colleagues — learn about the current regulations from the Public Company Accounting Oversight Board.

"These regulations can have tremendous impact on the daily drivers of our clients' businesses, and they need to know how to remain in compliance. We, as their service providers, need to understand what their biggest hurdles are and how we can educate them so they can operate effectively within the guidelines. Additionally, we spend a lot of time on what we can do internally to bring audit efficiencies to our clients' processes."

Prior to joining the firm, Jakubowski worked in the Internal Audit and Sox Compliance group at a publicly traded telecommunications company, and as an external auditor for a public accounting firm.

Jakubowski earned a bachelor's degree in accounting, corporate finance from Bentley University.

She is a member of the American Institute of Certified Public Accountants, Association of Certified Fraud Examiners and Institute of Internal Auditors.

EisnerAmper LLP has had a significant presence on Long Island for many years, serving the firm's clients through all stages of their corporate lives, from entrepreneurial operations to mature enterprises. Its practice is based on deploying the strengths of its partners and professionals across the disciplines of audit, tax, and business advisory services as well as advisory services in litigation consulting and forensic accounting, corporate finance, regulatory compliance, internal audit and risk management, royalty audit and contract compliance, information technology and other professional services.

EisnerAmper works with enterprises as di-

verse as sophisticated financial institutions and start-ups, global public corporations and middle-market companies, as well as high net worth individuals and family offices, not-for-profit organizations, and entrepreneurial ventures across a variety of industries.



DIANE KREBS
Jackson Lewis
P.C.

Diane Krebs is counsel in the Long Island office of Jackson Lewis P.C. Krebs' practice focuses on representing employers in workplace law matters, including preventive advice and counseling.

Krebs has extensive experience in civil rights and labor and employment matters, including discrimination, harassment, retaliation, wrongful termination, defamation, civil service, equal pay, and wage and hour claims. She represents companies, large and small, public and private, in labor and employment litigation before federal, state and local courts, agencies, mediators and arbitrators.

Krebs also provides comprehensive counseling and advice to corporate owners and human resource personnel on daily issues and personnel decisions that arise in the workplace, including reductions-in-force, emergency workplace situations, and litigation avoidance and/or minimization techniques. In that capacity,

Krebs has prepared and reviewed a multitude of human resource-related documents, including employment applications, FMLA forms, disciplinary notices, performance reviews, termination letters and employee handbooks.

June 2019 saw an upheaval in employment law in New York State, as the New York State Human Rights Law expanded in scope and interpretation, Krebs said.

"Among other changes, unlimited punitive damages and attorneys' fees are now available; all employers, regardless of size, are now subject to the HRL; and the standard for what qualifies as harassing conduct was severely relaxed," she said.

"Clearly a continuation of the #metoo effect, the full ramifications of the changes in the law have not yet been felt," Krebs noted. "Since the outset of #metoo, I have been working with clients to put them in the best position to defend against future employment claims. This includes updating policies, updating training programs, and discussing the implementation of arbitration agreements and/or agreements for jury trial waivers."

Krebs has authored and collaborated on articles on a variety of labor and employment issues. She is also a frequent lecturer to attorneys, supervisors, and human resource professionals, not only in open seminars but also for in-house training, tailored to the employer's specifications.

Krebs earned a juris doctor, cum laude, from New York University School of Law and a bachelor's degree, magna cum laude, from Queens College of the City University of New York.

She is admitted to practice in New York; New Jersey; 2nd Circuit Court of Appeals; 3rd Cir-

cuit Court of Appeals, New Jersey - D. N.J.; New York - E.D. N.Y.; New York - S.D. N.Y.; and New York - W.D. N.Y.

Jackson Lewis P.C. is a law firm with more than 900 attorneys in major cities nationwide serving clients across a wide range of practices and industries. Having built its reputation on providing workplace law representation to management, the firm has grown to include practices in the areas of government relations, healthcare and sports law. Named the "Innovative Law Firm of the Year" by the International Legal Technology Association, the firm's commitment to client service draws clients to Jackson Lewis for excellent value-driven legal advice.



**JENNIFER
LAVERN**
AURAA
UNLIMITED

Jennifer Lavern is CEO of AURAA UNLIMITED. Lavern founded the company in 1996 to provide unparalleled content for personal and professional enhancement. The foundation for AURAA UNLIMITED was laid early as Lavern discovered her gift for language and writing, a combination of both her oral and aural talents delivered with her own "unique flavour." Coupled with a passion for excellence and personal development, she charted her own course by

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exploring her desire for self-expression by way of verbal and written communication.

Lavern is a writer, blogger, mentor and public speaker who creates and delivers with “colour and flavor” content that addresses the challenges and joys of being a woman in transition.

Having had her own life derailed a couple of times, Lavern had lost most of her worldly possessions and for a season her “voice.” Through her years-long character-building ordeal, she discovered that life’s trials are universal and not specific to age, race, profession, religion, education or income level, class or culture.

Lavern is a staunch believer that “Challenge Equals Opportunity” even when opportunity hardily refuses to consult with convenience. “A very persistent woman disguised as an elegant dame” is how Lavern has been described.

Lavern takes the invaluable lessons she learned during her own complex personal journey and uses them to support and uplift other women through their various life seasons. In addition to delivering impactful keynote addresses, she has designed a series of creative workshops that she presents to women’s organizations, networking groups, faith-based organizations, students, girls’ mentoring programs as well as at conferences and special events.

“In 2019, my singular focus is to deliver content ‘beyond the stage’ that would inspire others to both examine and excavate the depths of their own soul’s calling to liberate their true ‘voice’ regardless of contrarian or opposing opinions,” Lavern said. “To that end, I have developed The Women In The Spotlight Lounge to facilitate individual and small group peer gatherings.”

To enhance her craft, Lavern invested in training seminars presented by master communicators such as world-renowned Les Brown, Master of Possibility Mark Victor Hansen, the award-winning Dr. James Dentley of Inspired 2 Speak and Powerteam International’s Bill Walsh. To hone her presentation skills, she trained with leading media trainers Jess Todtfeld of Success In Media, Inc. and Media Training Worldwide’s TJ Walker.

A dedicated advocate of women’s causes over the past 25 years, Lavern has volunteered at various community organizations. She recently served on the board of the Suffolk County Women’s Business Enterprise Coalition (SCWBEC) as co-director of public relations and was on the Business Advisory Board of Women on the Move, Long Island. She has volunteered as a personal shopper/stylist for Dress for Success, NY and facilitated workshops for program graduates in their Professional Women’s Group. In addition, she held posts on the executive board of the Top Ladies of Distinction, Gotham Chapter, as well as the Elizabeth Support Group of the Greater Alen Cathedral where she also participated as a workshop leader and mentor in the Girls’ Rites of Passage Mentoring Program.

From language teacher to stints in advertising, legal, publishing and financial marketing over a 20-year period, Lavern made her mark in the corporate arena. A contributing editor and writer for various publications, Lavern developed a signature style, which she has since parlayed into a compelling presence on the public speaking circuit.



JULIE LEVY
BNB Bank

Julie Levy recently joined BNB Bank as chief marketing officer. Levy brings to BNB an extensive tenure in bank marketing with a focus on strategic planning and business management.

Prior to joining BNB Bank, Levy was the retail strategist at People’s United Bank.

With 20 years as a senior executive in Citibank’s credit card division and several years as a consultant for Fin Tech startups, Levy is part of the BNB growth team charged with increasing customer engagement across the bank’s footprint.

“BNB Bank has built its brand and business on understanding local markets and delivering high touch service to business clients,” Levy said.

“Today, the customer experience and responsive delivery of online and on site products and services is a focus, underscoring our priority to consistently meet our clients’ changing needs,” she said. “BNB is making significant investments in the user experience on our digital platform and expanding the product set to support easy access and convenience.”

Levy earned her bachelor degree and master’s degree from New York University’s Stern School of Business.

Bridge Bancorp, Inc. is a bank holding company engaged in commercial banking and financial services through its wholly-owned subsidiary, BNB Bank. Established in 1910, BNB, with assets of approximately \$4.7 billion, operates 39 branch locations serving Long Island and the greater New York metropolitan area. In addition, BNB operates one loan production office in Manhattan. Through its branch network and its electronic delivery channels, BNB provides deposit and loan products and financial services to local businesses, consumers and municipalities.

Title insurance services are offered through BNB’s wholly-owned subsidiary, Bridge Abstract. Bridge Financial Services, Inc., a wholly-owned subsidiary of BNB, offers financial planning and investment consultation.



PATRICIA C. MARCINI
Farrell Fritz

Patricia C. Marcini is a trusts & estates partner in the law firm of Farrell Fritz.

Marcini has authored articles on various estate planning and trust and estate administration topics and writes a monthly column on trust and estate issues for *Lloyd Harbor Life* called “Wills, Trusts & Estates: Plain & Simple.” She also speaks frequently at conferences about tax and legal issues in estate planning and estate administration, including for the NYSCPA Society and the New York State Bar Association.

Marcini provides each client with the time and information each needs to fully understand their own estate planning needs and the options to carry out their desires.

“Each client should feel that I am totally ‘in their corner,’ and it takes time for clients to get to know you to gain that comfort level,” Marcini said. “My

goal is to effect each client’s wishes in the best way possible and ensure the client feels comfortable with the decisions he or she has made.”

Marcini has been named to Super Lawyers’ New York—Metro Estate Planning & Probate list annually since 2012. She was recognized as a 2019 Outstanding Woman in Law by the Maurice A. Deane School of Law at Hofstra University.

In 2013, Marcini was appointed chair of the development committee of the board of trustees of Northwell Huntington Hospital. She currently serves on the board of directors of Northwell Huntington Hospital and is a member of the professional advisory committee for the Northwell Foundation. Earlier this year, Marcini was named chair of the Long Island Community Foundation’s board of advisors and is on the board of advisors for the North Shore Holiday House.

Marcini earned a juris doctor, summa cum laude, from the Jacob D. Fuchsberg Law Center at Touro College and a bachelor’s degree from the State University of New York at Stony Brook.

Established in 1976, Farrell Fritz is headquartered in Uniondale, with offices in Albany, Hauppauge, New York City and Water Mill. The firm has more than 85 attorneys across 19 practice areas.

Farrell Fritz handles legal matters in the areas of bankruptcy and restructuring; business divorce; commercial litigation; construction; corporate and finance; eDiscovery; emerging companies and venture capital; employment law; environmental law; estate litigation; healthcare; land use and zoning; New York State Regulatory and Government Relations; not-for-profit law; real estate; tax planning and controversy; tax certiorari, and trusts and estates.

The firm’s attorneys have built a reputation for their responsiveness, practical advice, high quality legal services and thought leadership. They take prominent, active roles in scores of business, legal and philanthropic organizations; numerous are recognized regionally or nationally as leaders in their fields.

Farrell Fritz is well known for its pro bono work, board involvement, volunteer service and substantial financial support of local community organizations.



MARIA MASI
Flushing Bank

Maria Masi is vice president, wealth management/premier banking sales manager at Flushing Bank. Celebrating 30 years with Flushing Bank, Masi manages five financial consultants and interfaces with the broker dealer and retail branches to ensure audit and compliance standards are met. She has expanded the wealth management program offerings to include new financial solutions to help her clients achieve their financial goals.

Masi began her career as a teller and advanced through various roles, including assistant branch manager, while earning her bachelors of finance degree from Hofstra University. In 2001, she was asked to start up the wealth management business and has grown it into a successful and profitable enterprise.

A critical area of focus for Flushing Bank is cyber security, Masi said.

“Our customers trust us with their accounts and personal information and we take the responsibility of protecting their information and securing our systems against cyber threats very seriously,” she said. “Our environment is

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monitored to help protect our customer data, intellectual property, and business systems. As these cyber threats evolve, we modify and enhance our protective measures to remediate information security vulnerabilities."

"We also educate our customers on things they can do to protect their devices and personal data and post various alerts to keep them informed of the various scams," Masi explained.

Masi has organized women in business seminars, as well retirement-focused events for the client base.

She is a member of Bank Investment Securities Association and serves on the board of Lupus Foundation for Women.

Flushing Bank is a New York State-chartered commercial bank insured by the Federal Deposit Insurance Corporation. The bank serves consumers, businesses, professionals, corporate clients, and public entities by offering a full complement of deposit, loan, equipment finance, and cash management services through its banking offices located in Queens, Brooklyn, Manhattan, and on Long Island.

As a leader in real estate lending, the bank's lending teams create mortgage solutions for real estate owners and property managers both within and outside the New York City metropolitan area. Flushing Bank® is an Equal Housing Lender. The bank also operates an online banking division consisting of iGObanking.com®, which offers competitively priced deposit products to consumers nationwide, and BankPurely®, its eco-friendly, healthier lifestyle community brand.

ANDREA MATTERA

Albrecht, Viggiano, Zureck & Company, P.C. (AVZ)



Andrea Mattera joined Albrecht, Viggiano, Zureck & Company, P.C. (AVZ) in 2004, was promoted to principal in 2017 and welcomed as a member of the partner team in July 2019. Mattera provides accounting, auditing and taxation services to a diversified client base in a variety of industries including wholesale distribution, manufacturing, construction, professional services, and not-for profit entities.

AVZ is preparing for new lease accounting rules slated to take effect next year, Mattera said.

"One of the areas where we are focused is the new lease standard which is effective in 2020, for most of our clients, unless the FASB delays implementation," Mattera said. "Under current standards, operating leases are off balance sheet. The new standard requires lessees to recognize virtually all leases as assets and liabilities on their balance sheets. This standard will significantly impact financial statement presentation and key ratios which, therefore, could impact companies' compliance with loan covenants, if not addressed in advance with lenders."

"At AVZ, we are helping our clients understand the impact of implementation, initiating discussions with lenders, and researching lease accounting software that can handle the required accounting and disclosures," Mattera said.

Mattera has been selected to be in the first AVZ Emerging Leaders Academy class. This class, which is part of the Upstream Academy, is a three-year course that prepares high potential candidates to be the future leaders of a firm.

She began her career in 1998 with a mid-sized public accounting firm in Nassau County. She later joined the Assurance and Business Advisory Services Practice at Ernst and Young, LLP, in

Melville, where she specialized in auditing of retail, distribution and manufacturing companies.

Mattera is a member of the American Institute of Certified Public Accountants and the New York State Society of Certified Public Accountants. She also serves as chair of the SUNY Old Westbury School of Business Advisory Board and is an active member of the Human Rights Campaign.

Mattera earned a bachelor's degree in accounting from the State University of Old Westbury.

AVZ, located in Hauppauge, is one of the largest certified public accounting firms on Long Island providing a wide range of financial, accounting, auditing, tax and consulting services to a variety of businesses and industries. AVZ serves a myriad of clients primarily on Long Island — and has been doing so for more than 60 years.

The firm considers itself a partner in growth for privately held businesses, not-for-profit organizations and government agencies. AVZ is also an independent member of BKR International, a leading global association of independent accounting and business advisory firms representing the expertise of more than 160 member firms with over 500 offices in over 80 countries around the world.

ISABEL C. MIRA, ESQ.

Pegalis Law Group, LLC



Isabel C. Mira is an attorney at Pegalis Law Group, LLC in Lake Success. Mira is a distinguished advocate for plaintiffs' rights and has practiced law for 17 years in the United States and South America. She conducts pre-trial litigation representing patients in medical malpractice actions for Pegalis Law Group.

People need to become more proactive in their healthcare, Mira said.

"The third leading cause of death in the U.S. is medical errors," she said. "Our job is to represent people hurt by negligence, but we deeply believe that we have a responsibility to shine light on instances where a medical error could have been prevented. In this way we generate change in the health system whereby doctors and hospitals will work to prevent such errors and patients will be more proactive in their own treatment."

"Our website, our videos, our social media, and community workshops are committed to educate consumers of health care to achieve that goal," Mira noted.

Prior to joining Pegalis Law Group, Mira negotiated plaintiff's settlements and managed pre-trial litigation in debt collections, to succeed for clients while ensuring compliance with federal and state requirements. She also advocated for clients with disabilities in court hearings and appeals. Mira enjoyed a mid-career opportunity to intern at Glen Cove City Court assisting the Honorable Joseph McCain with legal research and drafting decisions. Although already an attorney, when she first arrived in the United States she began working as a legal assistant in a plaintiffs' personal injury law firm.

Mira represented clients in civil litigation matters in her native country of Colombia, South America, as a solo practitioner. She also practiced law at Corantioquia, a government agency charged with the enforcement of environmental policy. There she prepared legal responses to public petitions, administrative decisions, and official documents for environmental regulations.

Mira is a member of the Nassau Suffolk Trial Lawyers Association, the Nassau County

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Women's Bar Association, the Long Island Hispanic Bar Association, the Nassau County Bar Association, the New York State Trial Lawyers Association, and the American Association for Justice. She is admitted to practice law in New York and Colombia, as well as in the Federal Courts for Eastern and Southern Districts of New York. She earned a law degree from Universidad de Medellín, Colombia. She graduated with a Master of Laws degree from St. John's University School of Law.

Pegalis Law Group, LLC is a New York law firm for those suffering as a result of avoidable medical errors and personal injury. The firm obtains justice for its clients after hospitals, doctors, medical personnel, construction companies, or automobile drivers commit avoidable errors that cause our clients life-altering harm. In 47 years of practice, the firm has won some of the largest verdicts in New York State history and strives for medical accountability to ensure safer medical practices for better patient care.



ERIN A. O'BRIEN
Certilman Balin
Adler & Hyman,
LLP

Erin A. O'Brien is a partner in Certilman Balin Adler & Hyman, LLP's Tax Certiorari and Condemnation Practice Group. O'Brien has successfully litigated before the Supreme and Appellate Courts throughout the State of New York, creating legal precedent with the arena of tax certiorari law.

There is a clear need for more transparent client communications in the legal industry, O'Brien said.

"All attorneys attempt to meet their clients' needs, but the best attorneys actually listen to their clients in order to better identify their concerns and priorities," she said. "Full disclosure to our clients is extremely important in order to set realistic expectations, as well as to allow the client to consider all of his or her options while forming a decision."

Admitted to practice in the Eastern District, as well as the states of New York and Connecticut, O'Brien is a member of the New York State Assessors' Association, the New York State Bar Association, and both the Nassau and Suffolk County Bar Associations. In addition, she serves on their Tax Certiorari and Real Property Committees.

Prior to joining Certilman Balin, O'Brien was a partner at the law firm of Cronin, Cronin, Harris & O'Brien, P.C.

O'Brien is a founding member of Women in Tax Assessment (WITA), serves on the associate board of the Association for a Better Long Island (ABLI) and has been a guest speaker at various symposiums throughout New York State.

She earned a juris doctor from the City University of New York School of Law where she was a member of Law Review; and earned a bachelor's degree from North Carolina State University.

Certilman Balin Adler & Hyman, LLP, which is among Long Island's largest full-service law firms, has offices in Nassau and Suffolk Counties. Its 15 practice areas include: real estate, real property tax certiorari and condemnation, cooperative and condominium, land use, environmental law, corporate/securities, litigation, commercial lending, labor relations/employment law, bankruptcy and debtor/creditor rights, nonprofit/tax exempt and religious organizations, trusts and estates, elder law, telecommunications law, and criminal law.



JACLYN PERANTEAU, PE
Key Civil
Engineering, P.C.

Jaclyn Peranteau, PE and Marc Pilotta, PE are principals and owners of Key Civil Engineering, P.C. (KCE), a professional consulting firm in Holtsville specializing in civil engineering and land development projects throughout the New York Metro area and Long Island. KCE is also a New York State and New York City Certified Woman-Owned Business Enterprise (WBE). Peranteau and Pilotta are licensed professionals with a combined experience of over 40 years in civil engineering. Their dedication to their profession and successful record of accomplishments in engineering design, project management and construction speak for themselves.

Peranteau earned a Bachelors of Science in Civil & Environmental Engineering from Carnegie Mellon University and is an active member in the New York State Society of Professional Engineers. She has been operating the firm, alongside her partner, for the last 10 years and is recognized as an industry leader in the civil engineering profession with 20 years of design and permitting experience.

Peranteau points to increasing barriers when it comes to property owners filling out applications to improve their sites.

"In my industry, development has become more costly, as I have found that governing agencies are more stringent with their review of simple applications," she said. "They are enforcing requirements that should only be considered for major redevelopments or new developments."

"Many clients who are looking to make small improvements to their properties, such as new paving in the parking lots or putting a new tenant in a shopping center cannot afford to do the additional work mandated by the towns, Health Department or DOT, Peranteau noted. "Owners are trying to do the right thing, by making applications and improving their properties, however when agencies scrutinize the existing property conditions and mandate improvements beyond the area of work, they make the projects not viable."

"In the end the project doesn't proceed and the property remains in poor condition with the business and opportunity disappearing," Peranteau said.

Peranteau has successfully managed multiple projects through the design, permitting, and construction process with a core experience focused mainly on commercial and residential developments. With her hands-on project management style, Peranteau treats every project with complete ownership and mindfulness towards construction costs in her overall design approach. The most recent examples of her work include a large industrial subdivision project in Yaphank and multiple projects at Stony Brook University including a new Indoor Practice Field, Residence Hall, and Institute for Discovery & Innovation in Medicine & Engineering Facility.

Among Peranteau's recognitions include Schneps 2018 Stars under 40 award and the Town of Brookhaven for 2016 Woman in Design Recognition. Peranteau maintains seven professional engineering licenses and works with many nonprofit organizations to mentor and cultivate the engineering profession and education to young students. Additionally, she sits on the External Advisory Board for Stony

Brook University's Civil Engineering Department.

KCE offers principal level service, customer service, and quality on every aspect of the project. "We pride ourselves on our exceptional industry knowledge, professional integrity, and passion for the engineering profession and have found that the key to our success begins with great customer service that understands the immediacy of the industry," Peranteau said. "We respond quickly to project related items and client questions and provide creative project design options or permitting strategies to the client that can help move the project toward success."



BARBARA PESCE
Simply Systematic

Barbara Pesce is president and founder of Simply Systematic in Levittown, a process solutions company that specializes in paperwork management and bookkeeping.

Pesce is a problem solver. She has lent her talent to a diverse array of businesses in varying industries for the last 30 years. With her expertise in and uncanny knack for streamlining business processes, it was only natural that she would eventually parlay her skill set into a thriving business of her own.

In 2014, Pesce founded Simply Systematic. Employing the "EHAH" philosophy and her affinity for numbers and order, she utilizes her ability to transform the most complex business dystopia into a simple, organized and duplicable system. Pesce believes "everything has a home" and with laser-focused precision she arranges paper files, digital accounts and figures and categorizes them for easy access by the business owner. With attention to the smallest detail, her goal is to ensure that the business is run efficiently so that her client is free to concentrate on the big picture and, ultimately the bottom line.

"In 2019, I am focusing on helping my clients streamline and lighten their paperwork processes so they can do more business with the same resources," Pesce said.

Pesce is multi-faceted and credits much of her success, both personal and professional, to the pursuit of an unorthodox hobby. In 2008, she became a Board Certified Hypnotist. Though she does not maintain a physical office, she interjects her training into her organizing work. She maintains that being a hypnotist adds to her understanding of how to help clients disrupt and overcome long held disorganized patterns of working.

In 2013, Pesce was recognized as a Fortune 52 woman of excellence by Beverly Fortune's then-existing *Milieu* Magazine. From 2013 to 2017, she oversaw the Long Island Chapter of Over 40 Females, a nationally recognized networking group for professional women. At the end of her tenure, while contemplating her next move, she purchased a small "fixer-upper" for herself and her two children. She later combined her leadership skills with her love for organizing and formed The Women's Workshops, which comprise an event series of hands-on workshops that teach D-I-Y-style home repairs primarily to women and men, if they're so inclined.

Simply Systematic is a process solutions company that specializes in paperwork management and bookkeeping for budget-conscious companies that identify a need for organiza-

tional management. The company tag line, "We'll make a method from your madness" assures business owners that individualized designed systems will enable them the freedom to focus on what they do best — tend to their business. Simply Systematic serves small- to mid-sized companies that may or may not have the resources to retain long-term full-time employees on a consistent basis.



MARISSA J. PULLANO
Jaspan
Schlesinger LLP

Marissa J. Pullano is a partner at Jaspan Schlesinger LLP in Garden City and member of the firm's Matrimonial & Family Law Practice Group, representing clients in complex divorce matters.

Pullano's practice includes all aspects surrounding the dissolution of marriage, including the distribution of substantial real property and assets, child support and maintenance, custody and visitation, shared parenting, order modifications and enforcement, and the valuation and distribution of business and professional practices.

Family and matrimonial legal matters can be highly charged and emotionally draining, and attempting to resolve a marriage through the overcrowded court calendars adds time, cost and stress, Pullano said.

"More and more couples are looking to Alternative Dispute Resolution (ADR) as a means to end a marriage outside of the court system," she noted. "As both a certified mediator and collaboratively trained lawyer, I am a strong advocate for resolving disputes in the least painful manner possible. ADR can include mediation, the collaborative divorce process, binding and non-binding arbitration and private judging, all of which may, and often times do, resolve matters quickly, cost effectively and privately."

Pullano has been consistently recognized by Super Lawyers as a Rising Star – in 2014 and 2015 in Florida, and subsequently each year in the New York Metropolitan area. In 2019, she was named an Outstanding Woman in Law by Hofstra University.

She is a graduate of The Catholic University of America with a degree in social work, and sits on that school's Alumni Association Board of Governors. She received a juris doctor from Nova Southeastern University, Shephard Broad College of Law, and is admitted to practice law in the State Courts of New York and Florida. She is also a member of the Collaborative Family Law Institute and The New York Family Law American Inn of Court, a Certified Mediator by the American Academy of Matrimonial Lawyers and serves on the executive board of the Nassau County Bar Association's Matrimonial Committee.

Pullano co-founded a Young Lawyers for Literacy Campaign while practicing law in Florida. The literacy initiative continues to promote early childhood education in public schools serving some of the most underserved communities in South Florida. Marissa is also active in fundraising efforts on behalf of the National PKU Alliance, the National PKU News and HowMuchPhe.Org whose missions are to improve the lives of individuals living with Phenylketonuria (PKU) and to pursue a cure.

Jaspan Schlesinger LLP is one of Long Island's leading full-service law firms, providing exceptional legal services in the areas of commercial

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litigation, banking and financial services, education law, municipal law, real estate, land use and zoning, tax certiorari and condemnation, matrimonial and family law, and estates and trusts. With approximately 60 attorneys, Jaspán Schlesinger is equipped to handle complex matters while delivering individualized advice and counsel to its clients.



Wendy Hoey Sheinberg is a partner in the law firm of Rivkin Radler LLP in Uniondale. Sheinberg concentrates in the areas of guardianship, elder law, special needs planning, trust and estate planning and trust and estate administration.

Sheinberg has been certified by the National Elder Law Foundation as a Certified Elder Law Attorney (CELA). She was selected as a Fellow of the National Academy of Elder Law Attorneys (NAELA). Selection as a Fellow is the highest honor bestowed by the Academy.

There is so much confusion about estate and long-term-care planning, Sheinberg said.

"New York's estate tax rules differ from federal estate tax rules," she said. "Because of the New York specific estate tax, New Yorkers must consider estate planning. Estate planning can also help protect against financial hardship and can preserve benefits for a person with disabilities."

"I help my clients clarify their goals and understand the labyrinth of rules, Sheinberg noted. "Once the fog of misinformation has lifted, I work with them to craft and implement a plan that addresses their needs comprehensively and effectively."

Sheinberg has presented at numerous seminars on elder law and estate planning, senior housing and on probate and estate administration and has lectured for the New York State Bar Association, the Nassau County Bar Association and many other notable local civic and religious groups.

She is admitted to practice law in New York and Connecticut and before the United States District Courts of the Eastern and Southern Districts. Sheinberg is a member of the New York State Bar Association: Elder Law Section and the Irish American Bar Association of New York.

Sheinberg earned a juris doctor from Touro College Jacob D. Fuchsberg Law Center and a bachelor's degree from Long Island University at C.W. Post.

Martindale-Hubbell recognizes Sheinberg as an AV® rated attorney, a significant rating accomplishment — a testament to the fact that a lawyer's peers rank him or her at the highest level of professional excellence.

She has repeatedly been named one of the top elder law attorneys in the New York Metro area by Super Lawyers and one of the top women attorneys in the New York Metro area by Super Lawyers. Sheinberg was named to Hofstra Law's Outstanding Women in Law Awards in 2018 and *Long Island Pulse* magazine Top Ten Legal Eagles of 2014.

Sheinberg has published articles in the *New York State Bar Association Law Journal*, the *University of South Dakota Law Review*, the *NAELA Quarterly*, *Senior News* and the journal of the Nassau County Bar Association. She has been interviewed and quoted in many notable publications and news services.

Through five offices and 190 lawyers, Rivkin

Radler provides strong representation and builds even stronger client relationships. Many clients have been placing their trust in the firm for more than 25 years. The firm's unwavering commitment to total client satisfaction is the driving force behind the firm.

Rivkin Radler is the advisor-of-choice to successful individuals, middle-market companies and large corporations. And for clients who prefer to speak their native language, we can communicate in Albanian, French, French and Haitian Creole, Greek, Hebrew, Hindi, Italian, Korean, Pilipino, Polish, Portuguese, Punjabi, Russian, Spanish, Tagalog, and Urdu.

Many of the firm's attorneys have received Martindale Hubbell's AV Preeminent® ranking, signifying that "a lawyer's peers rank him or her at the highest level of professional excellence." Time and again, our attorneys are recognized as leaders by peer review programs, including Best Lawyers/*U.S. News & World Report* and Super Lawyers.

Rivkin Radler has been named among the Top 100 Private Companies on Long Island by *Newsday* and is consistently ranked among the *New York Law Journal's* 100 Largest Law Firms in New York. The firm is proud to have received Advancement for Commerce, Industry and Technology's, Commitment to Excellence and Leadership Award.



Kathleen E. Suker, CPA/ABV/CFF, CFE is a senior manager in Marcum's National Advisory/Business Valuation Group and is also a member of its Forensic/Litigation Support practice group. Suker primarily offers business valuation services to owners of closely-held businesses for use in gifting, estate planning, shareholder disputes and matrimonial dissolutions.

Suker also works with clients on matters related to commercial litigation, economic damages, lost profits, business interruption and fraud investigations. She has worked with counsel to develop case strategies, has assisted with depositions and with preparing reports and exhibits for trial.

The firm's most pressing issue has been and continues to be managing client expectations, Suker said.

"Meeting and exceeding client expectations is crucial to business growth," she said. "Business valuation and forensic accounting is a transactional business. Therefore, it is the repeat business from a client and the referrals received from a satisfied client's colleagues, friends, and family that keeps me busy and leads to the growth of the practice."

"Setting clear deliverables, establishing regular communication, being honest, and setting realistic expectations with the client is the basis for successfully managing a client's expectations, which, in turn, will lead to a satisfied client," Suker explained.

Suker has served as a testifying expert witness and is approved to accept appointments as an accountant and business appraiser in several counties of New York State pursuant to NYS Part 36 of the Rules of the Chief Judge.

She frequently speaks at industry organizations and writes articles for the firm's

newsletter *Forensic Files* on topics related to valuation, economic damages, forensic accounting, shareholder agreements and lost wage calculations.

Prior to joining the firm, Suker was with a boutique accounting firm where she specialized in analyzing complex business interruption and lost profit claims for companies ranging from mid-size to Fortune 500.

Suker earned a master's degree in accounting and a bachelor's degree in accounting from the State University of New York at Old Westbury.

Marcum LLP is one of the largest independent public accounting and advisory services firms in the nation, with offices in major business markets throughout the U.S., as well as Grand Cayman, China, and Ireland. Headquartered in New York City, Marcum provides a full spectrum of traditional tax, accounting, and assurance services; advisory, valuation, and litigation support; managed accounting services; and an extensive portfolio of specialty and niche industry practices. The firm serves both privately held and publicly traded companies, as well as nonprofit and social sector entities, high net worth individuals, private equity funds, and hedge funds, with a focus on middle-market companies and closely held family businesses. Marcum is a member of the Marcum Group, an organization providing a comprehensive array of professional services.



Catherine "Cay" Taylor is an attorney at Citrin Cooperman in Melville. Taylor's practice is focused in the areas of gift, estate, and fiduciary taxation and planning. After working many years with top New York law firms, she has brought a deep understanding of estate planning and estate and trust administration to Citrin Cooperman, where she is now a key member of the firm's Trusts and Estates Practice and a member of the group's advisory board.

Taylor serves as an advisor to members of the Private Clients Practice, working closely with them, their clients, and their clients' attorneys and financial planners to develop strategies for intergenerational wealth preservation, business succession, tax mitigation, and planning for the domestic and multinational individual and their families. She and her team provide fiduciary income tax and estate and trust administration services, including fiduciary accounting, to individual and corporate fiduciaries, as well preparing estate and gift tax returns.

Helping clients prepare for the future has become so much more complex as the world has become smaller, Taylor said.

"Business owners are reaching customers in multiple states, bringing up state and local tax (SALT) issues," she said. "Their children are not just living out of state, but in different countries, which can impact gifting. Domicile has become a huge issue, particularly in the tri-state area, both from an income and estate/inheritance tax standpoint. In my practice, I find that forging a collaborative relationship with my clients' financial advisors, estate planning

attorneys, and other professionals results in the best outcome for our client."

Taylor is a member of American Bar Association, the New York State Bar Association, the Nassau County Bar Association and Suffolk County Bar Association.

She earned a juris doctor from Brooklyn Law School and practices law in the states of New York and New Jersey.

Citrin Cooperman is among the largest, full-service assurance, tax, and business advisory firms in the United States, having steadily built its business serving a diverse and loyal clientele since 1979. The firm's daily mission is to help its clients "focus on what counts." Rooted in its core values, the firm provides a comprehensive, integrated business approach to traditional services, which includes proactive insights throughout the lifecycle of its clients wherever they do business, across the globe.



Tanike Troya is coordinator of multi-cultural services and outreach at Long Island Alzheimer's Foundation (LIAF) in Westbury.

A Certified Therapeutic Recreational Specialist, Troya helps develop, organize and facilitate social day programs for LIAF's participants at all stages of the disease and for their caregivers. She conducts outreach activities for the not for profit organization including community events, workshops, appearances and other communication opportunities.

Troya also works to educate and build connections and opportunities with health-care facilities, businesses, and families to expand programs and the number of participants for LIAF programs.

Fluent in English and Spanish, Troya has been developing a Spanish language program at LIAF to help its Spanish speaking participants.

"Studies have found that Hispanics are approximately 1.5 times more at risk for Alzheimer's than the general population," Troya noted. "Long Island has more than 50,000 individuals living with Alzheimer's, many of them Hispanic."

"Communication is a key element in working with our participants and their caregivers," she said. "We want to be an important resource for as many Long Islanders as possible. We don't want any language to be a barrier to our ability to make our participant families' lives better."

In addition to her work organizing various presentations, meetings and events for LIAF, she is also on the front lines, assessing diagnosed individuals and their families for placement in appropriate LIAF programs. Troya is also an in-home respite companion and program facilitator.

Founded in 1988, the Long Island Alzheimer's Foundation is committed to improving the quality of life for those living with Alzheimer's disease and related forms of dementia and their caregivers. LIAF offers programs for all stages of Alzheimer's disease that foster independence, dignity, well-being, and safety, as well as providing caregiver support groups, in-home respite care, transportation and additional services.

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ELIZABETH UZZO, SHRM-SCP, SPHR H2M



Elizabeth "Liz" Uzzo, SHRM-SCP, SPHR is a senior vice president and H2M's director of human resources (HR), a role she has held with the firm since 1992. Uzzo leads and directs the H2M human resources team to achieve excellence by planning, implementing, and evaluating employee development/human resources policies, programs, and practices.

Highly active within the A/E industry, she has worked closely with peer groups to bring to H2M 'first-in-class' HR organizational clarity on operational structure, employee development, recruiting/retaining talent, risk mitigation, regulatory compliance, workforce and succession planning, and strategic planning.

A constant challenge is attracting and retaining good talent in such a strong labor market during H2M's growth period, Uzzo said.

"There is a challenge in providing an environment of engagement and career development for employees on all levels while also maintaining all the daily changes in regulations surrounding employment and the required transactions needed to run a successful business," she said. "As we grow, we feel that continuous process and strategic improvement will be paramount in ensuring

we are the employer of choice into the future."

Uzzo has spoken at national industry conferences on topics such as employee engagement and best practices in human resources.

She earned a bachelor's degree in hospitality management from New York Institute of Technology (NYIT) and a master's degree in human resources management and labor relations. She holds senior level certifications from the Society of Human Resource Management (SHRM) and the Human Resources Certification Institute (HRCI).

Uzzo is active in charitable and civic organizations such as The Interfaith Nutrition Network (INN), Memorial Sloan Kettering Cancer Center Cycle for Survival, The NYIT Human Resource Management (HRM) Graduate Program Advisory Board and Alumni Board, Stony Brook University Women in STEM Advisory Board, Leadership Huntington Board, and a member the Long Island Chapter of SHRM.

Prior to joining H2M Liz worked as a pastry chef and owned/operated a commercial long-line fishing vessel business. She represented this industry across the eastern seaboard and the Gulf of Mexico in government to ensure fair representation in this community.

Celebrating over 85 years, H2M is a full-service consulting and design firm offering the expertise of more than 450 architects, engineers (water supply, civil/site, structural, M/E/P, wastewater and environmental), planners, designers, inspectors, surveyors and scientists. H2M's professionals combine their technical experience and specialized market knowledge and respond to our client's needs. The firm is proud of its long history of client service and consistent ability to meet architectural, engineering, and environmental challenges head on.

KAREN VITO Cactus Salon & Spas

Nutritional Cleansing, LLC



Karen Vito is marketing director of Cactus Salon & Spas, a Long Island franchise dedicated to providing a "total beauty" experience for women (and some men) across their eight Nassau and Suffolk County locations.

Vito has experience in the beauty industry having worked, consulted and partnered with health and wellness companies, plastic surgeons, cosmetic dentists, medical spa and several prominent salons over the last 35 years.

Vito is also owner and a health and wellness coach at Nutritional Cleansing, LLC in Huntington. The vision of Nutritional Cleansing is to provide guidance, tools and resources that will measurably impact world health and free individuals from physical and financial pain.

Vito is focused on positive developments for her clients in the areas of health and wealth.

Obesity is of paramount issue here, with the United States being ranked as the 16th most obese nation in the world," Vito said. "Diametrically opposed to the prevailing myth as to the underlying cause of the overweight population is the scourge of poverty, which is hidden in plain sight. I am fortunate to be a representative of the health and

wellness industry, which is well poised to address the underlying causes of this twin epidemic."

"I resolve to use my voice and my influence to disrupt the status quo to radically improve the health and wealth of my clients, one shake at a time," she said.

Vito co-created with Regina Galli a lifestyle internet television show "Shake it Up" with Karen & Regina. Since 2014, the fellow health enthusiasts have hosted mission-aligned guests whose expertise speaks to the specific areas of Style, Health, Attitude, Kindness and Entertainment, the agenda and meaning of the catchy acronym.

Vito volunteers at various organizations including the American Heart Association, Family Service League and the Carol M. Baldwin Breast Cancer Research Fund. She also sits on the board of directors of Hair We Share, a not-for-profit foundation, which was instrumental in helping her teenage daughter maintain her "dignity, confidence and self-esteem" during her battle with Acute Myeloid Leukemia in 2017.

The experience, the professional path and the personal credo neatly coalesce into Vito's ultimate purpose. In 2013, she had become affiliated with a direct selling wellness company whose mission to impact world health jibed with her own. Since then, she has successfully assisted hundreds of individuals by coaching them through one of the personalized wellness solutions, which include weight loss, energy, athletic performance, healthy aging and wealth creation.

One could say through the combined synergies of Cactus Salon & Spas and Nutritional Cleansing, LLC, Vito promotes beauty, both "inside and out."

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