

THE MASTER PLAN FOR AGING: THE FUTURE OF HEALTH AND LONG-TERM CARE IN NEW YORK STATE.

At the Forum, we bring together leaders in health care, government, advocacy, law and finance to share ideas and forge solutions.

WELCOME

Look around you – at every table are people passionate about taking care of "mom and dad" – but the fragmented systems, endless silos and misdirected funding of health and long-term care have left our seniors and disabled loved ones at risk. With a rapidly aging population, and a dwindling supply of health care workers, New York State has no time to waste when it comes to the pressing needs of its aging and disabled populations. Medicaid spending is up 40% over the last three years, and healthcare makes up a disproportionate amount of the state budget. Consumer advocates lobbied hard against deep funding cuts to Medicaid this Spring, with painful results in vital programs, including consumer directed care.

Is there a workable blueprint going forward? Are there new ideas on the horizon?

At the 29th Annual Elder Law Forum, our expert speakers and panelists analyze the harsh realities of caring for our seniors and loved ones with disabilities. We'll get an update from Lt. Gov. Antonio Delgado on Governor Hochul's Master Plan for Aging, which is nearing release of its Draft Final Report and promises unprecedented opportunities to support older adults and their caregivers. Amid continued labor shortages in health care and home care, we'll also hear from leaders in the NYS Legislature, state agencies, providers, payors, innovators and consumer advocates.

By bringing these various stakeholders together for a day of dynamic conversation, the Forum seeks to expand knowledge, forge ideas and deliver practical takeaways to serve our most vulnerable citizens. Are you ready?

Thank you for being part of the experience!

PIERRO, CONNOR & STRAUSS, LLC. YOUR TRUSTED COUNSEL

Elder Law • Medicaid Planning • Special Needs Planning • Long-Term Care Planning Estate Planning • Estate & Trust Administration & Litigation • Business & Tax Planning

Albany New York City

(518) 459-2100 (212) 661-2480



www.pierrolaw.com

Offices also in: Hudson, Lake Placid, Long Island, Clark, NJ; Falmouth, MA; Clearwater, FL

AGENDA

7:45AM	Registration: Breakfast, Exhibitors and Networking
8:20AM	Welcome, Overview - Louis Pierro, Esq., Pierro, Connor & Strauss – Forum Host
8:30AM	Serving an Aging State - Balancing Benefits and Budgets Dan Bazile, News Anchor, Spectrum News - Moderator - John McDonald, Committees on Health, Ways and Means, NYS Assembly, 108th District - Jacob Ashby, Committees on Aging, Health, Disabilities, NYS Senate, 43rd District - Amy Paulin, Chair, Committee on Health, NYS Assembly, 88th District - Gustavo Rivera, Chair, Committee on Health, NYS Senate, 33rd District
9:30AM	State Leaders: Update from the Executive Branch - Carol Rodat, Special Advisor to the Office of Aging and Long Term Care, NYS Department of Health - Greg Olsen, Acting Director, NYS Office for the Aging
10:20AM	Medicaid Home Care Update - Valerie Bogart, Of Counsel, Evelyn Frank Legal Resources Program, New York Legal Assistance Group
11:00AM	Coffee Break: Exhibitors and Networking Visit our Exhibitors and Qualify for our Apple Watch Raffle
11:20AM	Private Long-Term Care Financing: Critical Questions and New Solutions - Shawn Britt, Director, Long-term Care Initiatives, Advanced Consulting Group, Nationwide Financial - Bob Vandy, President, Advisors Insurance Brokers
11:50AM	Panel #1 – The Holy Grail of Home Care – How to Find, Manage and Pay for Care Aaron Connor, Esq., Managing Partner, Pierro, Connor & Strauss - Moderator - Valerie Bogart, Of Counsel, Evelyn Frank Legal Resources Program, New York Legal Assistance Group - Andrew DeLollo, Director of Financial Planning & Analysis, Consumer Directed Choices, Inc. - Alicia Kelley, Vice President, Government Programs, CDPHP - Andrew Koski, Vice President for Program Policy and Services, Home Care Association of New York State
12:45PM	Keynote - Antonio Delgado, New York State Lieutenant Governor
1:15PM	Lunch, Koi Pond at the Desmond Visit our Exhibitors and Qualify for our Apple Watch Raffle
2:00PM	Panel #2 – Innovations Across the Continuum – Reimagining Personal Healthcare Michelle Mazzacco, Executive Vice President, Continuing Care Network, St. Peter's Health Partners - Moderator - Becky Preve, Executive Director, Association on Aging in New York - Bob Hartman, Vice President of Product Design and Strategy, MVP Health Care - Daniel Reingold, President and Chief Executive Officer, River's Edge; Vice Chair, RiverSpring Living - Charlie Farhoodi, Co-Founder and Chief Operating Officer, Al Nexus Healthcare
3:00PM	Panel #3 – Disability Services: From Housing to Healthcare Elizabeth Martin, Chief Executive Officer, Living Resources - Moderator - Willow Baer, Executive Deputy Commissioner, NYS Office for People With Developmental Disabilities - Sarah Grimes, Director of Outreach and Community Relations, NYSARC Trust Services - Denise DiNoto, Executive Director, New York State Independent Living Council - Frank Hemming III, Senior Associate Attorney, Pierro, Connor & Strauss
3:50PM	Closing Remarks - Louis Pierro, Esq., Pierro, Connor & Strauss – Forum Host



LOUIS PIERRO, ESQ.

Founding Partner, Pierro, Connor & Strauss

Lou Pierro is the Founder and Principal of a law firm with offices in the Capital Region, New York City and additional locations in New York, Florida, New Jersey and Massachusetts. His Firm serves clients in the areas of Estate and Trust Planning, Elder Law, Estate and Trust Administration, Estate and Trust Litigation, Business and Tax Planning, and Special Needs Planning. Lou is a frequent speaker across the country on legal issues relating to estate planning, elder law and business planning.

Lou is also a Founder of ElderCounsel, a national membership organization of Elder Law and Special Needs law firms, (where he now serves as a consultant) providing proprietary document drafting software and education to over 1400 member firms in 50 states. He is the founder and the CEO of ApolloCare, LLC, a company that launched the VivaLynx App which provides 24x7 tech-enabled care management designed to provide seniors and disabled individuals unique opportunities to live independently in their own homes.

He has been recognized by Best Lawyers for Elder Law and for "Trusts and Estates" and by Super Lawyers for 15 years and has been selected to the Best Lawyers in America, The Best Lawyers in New York, Super Lawyers of the Hudson Valley, Top 25 Lawyers in Upstate New York, and New York Times "Top Attorneys in New York." In addition, Lou has maintained an AV preeminent rating from the Martindale-Hubbell since 2001.

A graduate of Lehigh University and Albany Law School, Lou was admitted to the New York State Bar in 1984 and is licensed to practice in all New York State Courts, the US Supreme Court and the Second Circuit Court of Appeals.



DAN BAZILE

Anchor, Spectrum News

Dan Bazile is an Emmy award-winning anchor at Spectrum News 1. Dan joined the Spectrum News Capital Region team in April 2018 to anchor the early morning hour and co-anchor our live morning program. Prior to joining the Spectrum News team, Dan spent a decade-long stint at an NBC affiliate station mastering the upstate New York news beat.

Throughout Dan's notable career, he has written about a wide range of topics from town board meetings to the State of the Union address. Dan has covered many major stories, including the September 11, 2001, terrorist attacks in Washington, D.C. and New York City, and he'll never forget just how important his role as a reporter was during this time - providing accurate information to viewers that connected so deeply to an event as it happened.

Today, Dan is inspired to come to work to look for the truth and help viewers better understand the community they live in. Dan is an expert storyteller in more ways than one. Aside from reporting, Dan has also written and published two books, with his third currently in progress. Dan has also been known to double as an actor – check out "The Adjustment Bureau" with Matt Damon, and you just might see him!



GUSTAVO RIVERA, NEW YORK STATE SENATE, DISTRICT 33

Chair, Committee on Health

State Senator Gustavo Rivera has represented the 33rd Senate District in the Bronx since November of 2010. The 33rd Senate District includes the neighborhoods of Kingsbridge Heights, Fordham, Belmont, Riverdale, Norwood, Bedford Park, Pelham Parkway, Van Nest, Morris Park, and parts of Allerton in The Bronx.

Since taking office, Senator Rivera has focused his efforts on addressing issues of health inequity both legislatively and on the ground. In 2018, his passion to improve the health of New Yorkers lead Majority Leader Andrea Stewart-Cousins to appoint Senator Rivera as the Chair of the New York State Senate's Health Committee. As the Chair, Senator Rivera's goal is to collaborate with his colleagues, stakeholders, and constituents to improve health outcomes, increase access to coverage, and ensure a financially viable system for the 20 million New Yorkers he proudly serves.

Prior to his appointment to Chair, Senator Rivera served as the ranking member of the Senate Health Committee for six years. As a sitting member of the committee, Senator Rivera passed three laws to ban smoking around schools, afterschools, and libraries, and has been a champion of public health and harm reduction policies. In March 2017, he became the main sponsor of the "New York Health Act," an innovative bill to create a single payer health system in New York State.

Gustavo was born in Santurce, Puerto Rico. In 1998, Gustavo graduated from the University of Puerto Rico and moved to New York to begin a doctoral program in political science at the Graduate Center of the City University of New York. A proud Bronxite, he has lived in Kingsbridge Heights for almost 20 years.



AMY PAULIN, NEW YORK STATE ASSEMBLY, DISTRICT 88

Chair, Committee on Health

Assembly Member Amy Paulin has served the 88th New York State Assembly District (Scarsdale, Edgemont, Eastchester, Bronxville, Tuckahoe, Pelham, Pelham Manor, and parts of New Rochelle and White Plains) since 2001. She chairs the Assembly Committee on Health and serves on the Committees on Rules and Education. A full-time legislator, Assembly Member Paulin annually ranks among the state's most productive and successful lawmakers. Her diverse legislative agenda includes health care, education, reproductive rights, child welfare, support for families, domestic violence prevention, sex trafficking elimination, government reform, sustainability, animal welfare, and gun control. She served as the Chair of the Assembly Committee on Energy from 2013-2017, working to encourage renewable energy and ensure our electricity grid is reliable, and as the Chair of the Assembly Committee on Corporations, Authorities and Commissions from 2018-2022, where she championed expanded broadband access, public transportation, and utility resiliency.

As one of the most prolific legislators in the Legislature, over 350 of her bills have been signed into law to date. Among her most important legislative accomplishments include writing and sponsoring the bill that eliminated the statute of limitations for rape, sponsoring the landmark Trafficking Victims Protection and Justice Act, which dramatically toughened penalties for traffickers and buyers while providing support to the victims of human trafficking to help rebuild their lives, and authoring the Birth Control Access Act, which greatly expanded access to birth control for New Yorkers by allowing pharmacists to both prescribe and dispense hormonal contraception.

Assembly Member Paulin was born and raised in Brooklyn, New York. She is a graduate of the State University of New York at Albany, holds a Master's degree, and has completed doctoral course work in Criminal Justice from SUNY Albany.

JACOB ASHBY, NEW YORK STATE SENATE, DISTRICT 43

Committees on Aging (Ranking), Disabilities, Health, Children and Families

Jake Ashby was elected to The New York State Senate on November 8, 2022. The 43rd District includes all of Rensselaer County and parts of Washington and Albany Counties. Senator Ashby served in the State Assembly from 2018-2022. He sponsored legislation making occupational and speech therapy more accessible. It was signed into law by the governor. Jake worked across the aisle to pass a bill that would expedite the naturalization process for the family members of service members and veterans. After he authored legislation protecting New Yorkers from carcinogenic contaminants in drinking water, state officials adopted more stringent safety standards.

Senator Ashby is thrilled to bring his common sense, bipartisan approach to the State Senate. His top priorities include delivering real tax relief, promoting public safety, and expanding mental health care for first responders, law enforcement officials and healthcare workers. Jake will continue to advocate for programming that helps veterans transition to civilian life. He is a strong supporter of the Second Amendment. A former Army Reserves Captain, Senator Ashby completed combat tours in Afghanistan and Iraq and deployed in support of a humanitarian mission in Africa.

Jake has worked as an occupational therapist and rehabilitation director for the last 20 years and operated his own community-based practice. Additionally, he's worked as an instructor at Maria College. Jake previously served as a Rensselaer County legislator. He earned his MBA in Healthcare Management from Union Graduate College in Schenectady, NY, a Bachelor of Science in Occupational Therapy from Keuka College, and an Associate in Arts from Hudson Valley Community College.



JOHN MCDONALD III, NEW YORK STATE ASSEMBLY, DISTRICT 108

Chair, Committee on Governmental Operations; Member, Committees on Health, Ways and Means

John T. McDonald III, RPh has served in the New York State Assembly representing the 108th Assembly District since 2013, which consists of parts of Albany, Rensselaer, and Saratoga counties, including the City of Cohoes, his hometown where he previously served as Mayor for 13 years, and the communities of Green Island, North Greenbush, East Greenbush, Rensselaer, Waterford, and the cities of Troy and Watervliet.

A life-long resident of Cohoes, John is a graduate of Keveny Memorial Academy and the Albany College of Pharmacy where he received a BS in Pharmaceutical Sciences in 1985 and was awarded an Honorary Doctorate of Humanities. John is a practicing pharmacist and an experienced small businessman as the previous owner of Marra's Pharmacy, his family business now celebrating 92 years in downtown Cohoes and serving the Capital Region.

As a member of the NYS Assembly, John serves as the Chair of the Governmental Operations Committee. John is a member of the following NYS Assembly Committees: Alcoholism & Drug Abuse, Health, Higher Education and Ways and Means. John focuses on his strengths in local government, health care, and small business. John has sponsored and passed legislation into law to reduce unfunded mandates to local governments, control the cost of property taxes, support job growth and workforce development, strengthen access to health care, and address the opioid crisis.





GREG OLSEN

Director, New York State Office for the Aging

Greg Olsen is the Acting Director of the New York State Office for the Aging (NYSOFA), where he oversees the agency's day-to-day operations and the administration of federal and state-funded programs designed to assist the more than 4.6 million older adult residents in the state, as well as programs that assist family members and others involved with helping older adults needing greater levels of assistance. NYSOFA assists older New Yorkers to be as independent as possible, for as long as possible, through advocacy and the development and delivery of programs and services that support and empower older New Yorkers and their families, in partnership with the network of public and private organizations that serve them. Greg has served in a variety of executive management positions within the agency.

Prior to joining NYSOFA, he served as chief of staff and legislative and policy director for Assemblyman Steve

Englebright, former chair of the Assembly Standing Committee on Aging. Greg Olsen was executive director of the New York State Alliance for Retired Americans, a union supported organization representing hundreds of thousands of union retirees. He also served as executive director of the New York State Coalition for the Aging, a nonprofit membership organization representing over 200 community-based organizations providing non-medical long-term care to the state's older adult population.

He received his master's degree in social work with a specialty in gerontology from Syracuse University's Maxwell School.



CAROL RODAT

Special Advisor to the Office of Aging and Long Term Care, New York State Department of Health

Carol Rodat is currently serving as Special Advisor to the Office of Aging and Long Term Care, in the New York State Department of Health. Prior to accepting this position, Carol was the director of the Division of Home and Community Based Services within the Department of Health.

Prior to joining the State, Carol was the president of the Home Care Association of New York State, Policy Director for the Paraprofessional Healthcare Institute in the Bronx, and was director of Hospital Trustees of New York State. Carol has a special interest in workforce and family caregivers, having served on the National Academy of Science, Medicine and Engineering's Committee charged with developing a national plan for family caregiving.

In her current role, Carol has the opportunity to work on policy related to home and community based care, long term services and supports, workforce development, hospice and palliative care and the Master Plan for Aging.



VALERIE BOGART

Of Counsel, Evelyn Frank Legal Resources Program, New York Legal Assistance Group (NYLAG)

Valerie Bogart served as Director of the Evelyn Frank Legal Resources Program (EFLRP) since 2002, where she is now in an Of Counsel role. The EFLRP program moved to the New York Legal Assistance Group from Selfhelp Community Services, Inc. in 2013. EFLRP advocates for access to long-term care for low-income seniors and people with disabilities through direct representation, policy advocacy, legal education, and its website http:// NYHealthAccess.org. Earlier, Valerie was an attorney for the Legal Aid Society Brooklyn Office for the Aging, Legal Services for the Elderly in Manhattan, and the Legal Aid Society in Minneapolis (Reginald Heber Smith Fellow).

A graduate of NYU School of Law, she lectures extensively for bar and social services organizations, has taught adjunct courses at CUNY and Fordham law schools, and has received numerous awards. She is a member of the Executive Committee of the New York State Bar Association Elder Law & Special Needs Section.



SHAWN BRITT

Director, Long-Term Care Initiatives, Advanced Consulting Group, Nationwide Financial

Shawn Britt has been engaged in the life insurance and LTC industry since 1995. She joined Nationwide in 2000 and has been a member of Nationwide's Advanced Consulting Group since 2005. Shawn has been a major influence in the development and promotion of Nationwide's suite of long-term care product solutions and specializes in positioning LTC products in Advanced Planning concepts.

Shawn is a frequently published author of white papers and articles on long-term care for Nationwide as well as the insurance industry. She has been widely published and interviewed regarding long-term care for numerous trade publications and national media that include the CLTC[™] Quarterly Digest, Broker World, The National Underwriter, Financial Advisor, Center for Long-Term Care Reform, The Wall Street Journal, CBS New Money Watch, Market Watch Radio, and LifeHealthPro.

Shawn is a frequent presenter and key-note speaker at numerous industry events and conferences including, Finseca (formerly AALU) and ILTCI. She authors for serves on the Board of Advisors of CLTCTM. Shawn also served for several years as an adjunct professor at The Ohio State University and been recognized as an alumnus of the month by the American College.



BOB VANDY

President, Advisors Insurance Brokers

Bob Vandy has over 30 years of experience in insurance & financial services, having been a personal producer, as well as serving in field and home office sales & marketing support and management capacities, supporting agents and advisors throughout the Northeastern U.S. He is responsible for the overall day to day operations of AIB, and for business development through the individual producer space, as well as through strategic partnerships in the independent broker-dealer, RIA, insurance agency, financial planning firm, benefit broker areas and more.

the independent broker-dealer, RIA, insurance agency, financial planning firm, benefit broker areas and more. Bob earned his LUTCF (Life Underwriter Training Council Fellow) designation in 1993, his CLU (Chartered Life Underwriter) designation in 1997, his ChFC (Chartered Financial Consultant) designation in 2000 and his CLTC (Certified in Long Term Care) designation in 2006. Each of these designations signifies the completion of advanced coursework and successful exam completion in the areas of life, health and long-term care insurance and investments, as well as the broader areas of retirement, business, pension, estate, and long-term care planning.

Bob is a member and past President of the Eastern New York Chapter of the Society of Financial Service Professionals (FSP) and a member and past director of the National Association of Insurance & Financial Advisors – Capital Region/NYS. Bob serves on the NAIFA National Long Term Care Working group and is on the Legislative Committee for NAIFA-NYS. He is also a member of the Estate Planning Council of Eastern New York.



AARON CONNOR, ESQ.

Managing Partner, Pierro, Connor & Strauss

Aaron Connor is a seasoned litigator, currently concentrating in the areas of guardianship, will/trust contests and other estate related litigation. He is also head of the firm's Long-Term Care Planning Department where he advises clients on how best to preserve assets for themselves and their families. Aaron regularly handles complex trust and estate litigation matters and assists clients in obtaining their fair share through discovery, litigation, and negotiation. Additionally, he utilizes sophisticated estate planning techniques in the establishment of estate tax avoidance vehicles and completing charitable giving in the most tax-efficient manner.

Aaron is admitted to practice in the State of New York and the United States District Court for the Northern District of New York. He is a member of the New York State Bar Association, the Albany County Bar Association and is currently an Editor for the Elder and Special Needs Law Journal. He has formerly served on the New York State Bar Association Committee on Legal Education and Admission to the Bar and was a board member of the Leukemia and Lymphoma Society of Northeastern New York. Aaron received his Bachelor of Arts Degree from the University at Albany and his Juris Doctorate from Albany Law School.



ALICIA KELLEY

Vice President, Government Programs, CDPHP

Alicia Kelley joined CDPHP in 2005 and currently serves as Vice President of Government Programs for the Capital Region's leading health plan. In this role, Alicia is responsible for the growth, retention, and operations for the plan's Medicare, State Programs and Individual lines of business.

With more than 20 years of experience in the health care industry, Alicia has worked in marketing, communications, product development, sales, and operations. Prior to joining CDPHP, she worked for the Healthy Capital District Initiative, a local not-for-profit that assists families and individuals with obtaining health care coverage through Medicaid, Family Health Plus, and Child Health Plus.

Since joining the Government Programs team at CDPHP, Alicia has been an active member of the community, serving on the boards of multiple not-for-profit organizations supporting senior citizens, and partnering with various agencies that help further the mission of CDPHP and its Medicare members. Alicia earned a Bachelor of Arts in Political Science and Sociology from Siena College in Albany, N.Y.



ANDREW KOSKI

Vice President for Program Policy and Services, Home Care Association of New York State

Andrew Koski is the Vice President for Program Policy and Services at the Home Care Association (HCA) of New York State where he has worked for nearly 20 years. Andrew monitors local, state and federal changes in Medicare, Medicaid and other programs that affect home care providers draw and their clients and prepares articles, testimony and comments on such changes and policy papers. He also leads HCA's emergency preparedness efforts in New York City and statewide.

Andrew follows regulatory changes that impact home care and writes *Alerts* for HCA members. He assists home care providers with regulatory and other issues related to their operations and patient care. He has conducted workshops on Medicare, Medicaid, Medigap, and managed care for professionals and consumers. He writes articles for HCA's weekly newsletter, Situation Report. He has authored and provided annual updates to chapters on Medicare and Supplemental Medical Insurance in New York Elder Law.

Andrew has also written chapters on SSI, Disability, Medicare, Supplemental Medical Insurance, Long Term Care Insurance and Veterans benefits in The Legal Rights of the Elderly, a book for consumers and caregivers. Andrew has a Bachelor of Arts degree from Queens College and a Master of Social Work degree from Hunter College School of Social Work.



ANDREW DELOLLO

Director of Financial Planning & Analysis, Consumer Directed Choices, Inc.

With a robust educational foundation in Public Health, Andrew DeLollo has built a distinguished career in healthcare administration, with a particular focus on non-profit organizations dedicated to serving those in need. Andrew holds a Master of Arts in International Relations with a concentration in Global Health from Ohio University.

Currently, Andrew serves as the Director of Financial Planning & Analysis at Consumer Directed Choices. In this role, he provides strategic direction for the agency's financial planning, monitoring, evaluation, and reporting processes. Additionally, Andrew plays a key role in supporting business development initiatives by identifying, obtaining, and managing grant opportunities to further the organization's mission.

Prior to joining Consumer Directed Choices, Andrew served as the Executive Director at the Marjorie Doyle Rockwell Center in Cohoes, NY. In this capacity, he managed a 52-bed Assisted Living Memory Care Facility, overseeing daily operations, budget management, compliance with regulatory requirements, and community engagement efforts.

Andrew's journey in aging services began as the Grant Manager for Eddy Alzheimer's Services, where he managed the lead contract for the Alzheimer's Caregiver Support Initiative. Through his efforts, Andrew significantly expanded caregiver support services in the community, demonstrating his commitment to improving the lives of individuals affected by Alzheimer's disease and related dementias.





ANTONIO DELGADO

Lieutenant Governor, New York State

Lt. Governor Delgado was born and raised in Schenectady, NY and currently resides in Rhinebeck, NY with his wife and twin boys. A graduate of Colgate University, Mr. Delgado earned a Rhodes Scholarship, and after returning home from Oxford, received a law degree from Harvard Law School. Mr. Delgado spent the next 5 years pursuing a career as a hip-hop artist in LA, empowering young people through music. Following that, he worked in the corporate space as an attorney focusing on complex commercial litigation.

These diverse experiences inspired Mr. Delgado to step into public service and work to empower all communities. Elected to the U.S. House of Representatives in 2018, he represented New York's 19th Congressional District – becoming the first person of color to represent Upstate NY in Congress. While in Congress, Lt. Governor Delgado was frequently recognized as one of the most effective and bi-partisan representatives, working with colleagues from both parties at all levels of government, and getting 18 of his bills signed into law – 10 under President Trump and 8 under President Biden.

Mr. Delgado was appointed in May of 2022 to serve as Lt. Governor and was elected to a full term in November of 2022. As Lieutenant Governor, he serves as chair of the Hate and Bias Prevention Unit, oversees the Regional Economic Development Council, and was recently tasked with heading up the newly formed Office of Service and Civic Engagement.



MICHELLE MAZZACCO

Executive Vice President, Continuing Care Network, St. Peter's Health Partners

Michelle Mazzacco has been an integral part of both The Eddy and SPHP networks for more than 37 years. She is a major contributor to the health care services field and an enormous advocate for the advancement of community based care services. Prior to her EVP positions, she served as regional vice president of SPHP's Community Services Division since 1994, including Eddy Visiting Nurse and Rehab Association, Eddy SeniorCare, and The Community Hospice.

Mazzacco has a bachelor of science degree in management with a minor in health services administration from Sage Evening College in Albany, and a master's in business administration from Sage Graduate School. Currently, she is a member of the board of directors for the Home Care Association of New York State (HCANYS), and The Glen at Hiland Meadows Senior Living in Queensbury.

Mazzacco is credited for her tireless efforts to improve the lives of chronically ill, frail and disabled individuals statewide who are homebound and rely on in-home health care to remain independent in their own homes. For her work, Mazzacco has been recognized with numerous awards, including the Capital District Business Review's "40 Under 40 Award," Northeast Health's "Chairman's Quality Award," the Home Care Association of New York State's "Distinguished Service Award" and "Advocacy Award," and HCANYS' highest honor – the Ruth Wilson Award.



BECKY PREVE

Executive Director, Association on Aging in New York

Becky Preve is a seasoned executive leader with extensive knowledge and skill in management of program and fiscal operations. Skills include fiscal management, policy analysis, governmental relations, advocacy, and grass-roots organization. As Executive Director for the Association on Aging in New York, a member organization representing the 59 area agencies on aging in NY, she has led the mission of the Association to support and enhance the capacity of New York's local area agencies on aging and to work in collaboration with the aging network to promote independence, preserve dignity, and advocate on the behalf of aging New Yorkers and their families.

Prior to joining the Association, Becky was Director for Franklin County Office for the Aging, where she was responsible for program operations of all aging services and supports, and management of \$3.2 million in funding, and managed the day-to-day operations of county government department, including reporting to local legislature and New York State Office for the Aging. Becky was also a key member of the Governor's task force regrading the Office of Community Living. In another role, she was an acute care social worker at Alice Hyde Medical Center in Malone, NY.

Becky earned her Bachelors of Science degree from Clarkson University in 2002, and has also received certification from the Institute for HealthCare Improvement, and Boston University of Social Work. Becky is a Board member for Adirondack Health Institute, Hospice of the North Country, Cornell Cooperative Extension, Cerebral Palsy of the North Country, and the Joint Commission for Economic Opportunity.



BOB HARTMAN

Vice President of Product Design and Strategy, MVP Health Care

Bob Hartman brings a wealth of experience to his role at MVP Health Care, where he has been a pivotal figure since 2015. In this capacity, Bob spearheads a dynamic team dedicated to the development and management of comprehensive insurance products for all business sectors. His leadership in the Medicare Advantage domain has been particularly noteworthy. He has overseen the introduction of groundbreaking services and benefits such as meal delivery, customer care kits, care guides, and transportation benefits; OTC cards; veteran-specific benefits—all while leveraging CMS initiatives like SSBCI and VBID.

In addition to his corporate achievements, Bob is also recognized for his contributions to higher education. As an Adjunct Professor at Roberts Wesleyan University, he imparts his expertise in Strategic Planning/Management and Organizational Leadership, roles he has held with distinction since 2015.

Bob's academic background includes a Bachelor of Arts in Religion/Philosophy and Humanities from Roberts Wesleyan University, complemented by a Master of Science in Management from Nazareth University. His educational pursuits have undoubtedly enriched his professional endeavors, allowing him to blend theoretical knowledge with practical application.



DANIEL REINGOLD

President and CEO, River's Edge; Vice Chair, Riverspring Living

Daniel Reingold is an internationally recognized leader in the field of aging. For the past 35 years, as President and CEO and now Vice Chair of RiverSpring Living, he created groundbreaking programs in elder care, won numerous honors and awards and has spoken at major national and international conferences about innovations and quality of life for older adults. RiverSpring Living, led by Dan since 1990, is grounded in its non-profit mission of care, with programs and services that have changed the conversation about growing older. From home care and managed care to housing and its top ranked Hebrew Home at Riverdale long-term care community, RiverSpring Living cares for over 18,000 older adults living at home, and in communities throughout the greater New York metropolitan area.

As a passionate advocate for older adults, Dan opened the Weinberg Center for Elder Justice in 2005, the nation's first elder abuse shelter. Reingold's vision also includes the development of intergenerational initiatives. Project HOPE (Healthcare Offers Permanent Employment) is a unique program that provides learning disabled high school students with the opportunity to complete their education while developing job skills by learning and working at the Hebrew Home alongside staff and residents.

Prior to joining RiverSpring Living, and River's Edge, Mr. Reingold was an attorney in private practice for 10 years. Reingold was awarded an honorary Doctor of Laws Degree from the University of Mount Saint Vincent in 2019 for his pioneering leadership in the field of aging. In 2018, he received the LeadingAge Award of Honor, the highest recognition in the field of non-profit long term care. In 2023, Mr. Reingold was awarded the Hebert Shore Award, which is the highest award conferred by the Association of Jewish Aging Services. In 2024, LeadingAge New York honored Mr. Reingold with its Lawrence E. Larson Award, their highest award.



CHARLIE FARHOODI

Co-Founder and Chief Operating Officer, AI Nexus Healthcare

In his role at AI Nexus Healthcare, Charlie is working to predict and prevent illness before it occurs by using advanced proprietary AI technologies to instantly analyze patient input and provide early warning of signs of pending illness. He has 15 years of experience tailoring complex products to client, user & partner needs.

Following a career on the trading desk as a portfolio manager, investment strategist and trusted advisor to JP-Morgan's wealthiest Private Bank clients, Charlie has managed FinTech, EdTech, eCommerce & Digital Health product teams in New York, Austin & Chicago. Charlie is responsible for overseeing strategic product direction, including product vision, product innovation, product design, product development & product marketing. He earned two Master of Science degrees from the University of Florida's Warrington College of Business in Finance, and in Business Administration and Management. Charlie currently lives in Chicago.



ELIZABETH MARTIN

CEO, Living Resources

Elizabeth is a strategic executive who is driven by mission, innovation, and excellence. She is the CEO of Living Resources; an Albany-based nonprofit that supports and empowers nearly 2,000 individuals with disabilities or other life challenges to live with dignity, independence, and happiness. Elizabeth joined Living Resources during the height of the COVID-19 pandemic. An innovative leader, Elizabeth helped the organization survive an extremely difficult COVID-19 infection surge, implemented successful pilot programs to address the workforce shortage, and led the agency through its first-ever comprehensive strategic planning process, setting organizational priorities and goals to position it for future growth and program diversification. All of this was accomplished while also creating an organizational culture that fosters passion, change, and innovation that promotes everyone's right to live self-determined lives as full citizens in the community. She is also a steadfast advocate for disability rights, funding, and support.

Prior to working at Living Resources, Elizabeth was CEO of Consumer Directed Choices (CDChoices); another Albany-based disability services nonprofit. While there, she helped CDChoices become one of the largest, most respected fiscal intermediaries for Consumer Directed Personal Assistance (CDPA) in the Capital Region. As a visionary, Elizabeth had a concept for how the CDPA program could provide a better experience for the consumers CDChoices serves. After several years of hard work, experimentation, and steady program redesign, Elizabeth and her team made CDChoices the first CDPA fiscal intermediary in New York State where program participants set their personal assistants' pay rates and can save for bonuses. Over the course of her tenure, CDChoices' revenues nearly tripled from \$12.5 million in 2012 to \$36.4 million in 2019.

WILLOW BAER

Executive Deputy Commissioner, New York State Office for People With Developmental Disabilities

Currently the Executive Deputy Commissioner of the New York State Office for People With Developmental Disabilities, Willow oversees the operational management of a complex statewide system of care and supports, including planning, fiscal oversight, and policy development. In her current role, Willow also has oversight of agency staff in a broad range of capacities, including direct care support, clinical and medical staff in residential and non-residential settings, maintenance and operations. OPWDD is the state agency that provides long-term supports and services to approximately 130,000 New Yorkers with developmental disabilities both directly and through a network of approximately 500 nonprofit service providing agencies.

Previously Willow has served twice as Assistant Counsel to the Governor, overseeing a broad range of priorities across the fields of Human Services and Mental Hygiene for Governor Kathy Hochul. Additionally, Willow served as General Counsel to OPWDD, General Counsel and Deputy Commissioner for the Office of Children & Family Services, and as Counsel to the NYS Justice Center.

Willow has spent her entire career working to protect and advocate for vulnerable populations. She is honored to step up this summer into the role of Acting Commissioner of OPWDD to continue her work to ensure that New Yorkers with developmental disabilities are afforded the best service system possible.

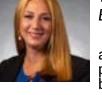


FRANK HEMMING III, ESQ.

Senior Associate Attorney, Pierro, Connor & Strauss

Frank Hemming concentrates his practice on Medicaid and Long-Term Care planning, counseling clients of Pierro, Connor & Strauss to prepare and file both community and chronic care Medicaid applications. As a frequent presenter in educational forums, he educates individuals and families on asset protection, and leads the Firm's acclaimed monthly webinar series, Medicaid Monday, for the 2nd year. Frank is also a frequent host on Life Happens Radio, the Firm's weekly program airing Saturdays at 11am on WGY iHeart station. Frank was honored as a Best Lawyers One to Watch in 2023 and 2024 and by Super Lawyers as a New York Rising Star in 2021-2023.

Frank received two Bachelor of Arts degrees in Psychology (summa cum laude) and Criminal Justice (summa cum laude) and his Master of Arts in Criminal Justice from the University at Albany. He received his Juris Doctor (magna cum laude) from Albany Law School in 2013. While in law school, Frank interned for the Orange County District Attorney's Office and the Honorable Jeffery G. Berry, one of three County Court judges based in Orange County, New York.





SARAH GRIMES

Director of Outreach and Community Relations, NYSARC Trust Services

Sarah Grimes joined NYSARC Trust Services as the Director of Outreach and Community Relations in 2016 to provide information and assistance to families and professionals who are seeking a pooled supplemental needs trust to qualify and maintain financial eligibility for Medicaid, Supplemental Security Income (SSI), and other means-tested benefits.

Sarah has presented on supplemental needs trusts and government benefit eligibility at events for the New York State Office for the Aging, at New York State Bar Association section meetings, and at various regional bar associations throughout New York State. She provides in-service trainings to attorneys, social workers, and service providers to raise awareness for the tools that can help people protect benefits and live independently in the community for as long as possible.

Sarah is responsible for cultivating relationships within the disability community to identify opportunities to enhance NYSARC's supplemental needs trust programs and to build a network of resources to fulfill its mission of improving the lives of people with disabilities. She is a strong advocate for trust beneficiaries, helping the individuals maximize the benefits they receive while using the funds in their trust to provide for life-enhancing items and services.

Sarah has been working professionally in the marketing field for over 10 years and the not-for-profit sector since 2015. Sarah graduated Magna Cum Laude with a Bachelor's in Science from Siena College School of Business (AACSB Accredited).



DENISE DINOTO

Executive Director, New York State Independent Living Council (NYSILC)

Denise DiNoto is a disability advocate, writer, public speaker, and former speech-language pathologist. She spends her workdays at NYSILC teaming with the council and staff working on the SPIL (State Plan for Independent Living) and helping increase the advocacy skills, leadership development, and empowerment of people with disabilities.

Prior to her position as executive director of NYSILC, Denise served as program manager for the New York State Department of Health's Disability and Health Program, advocating for inclusive public health workshops/infrastruc-ture and supporting health promotion programs for seniors and people with disabilities.

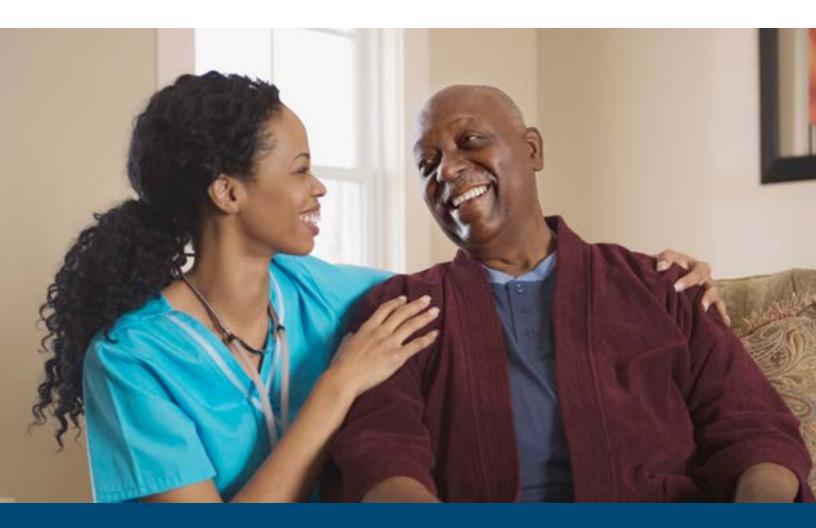
Growing up in a Rotary family (her father Sam was a Rotarian for more than 40 years), Denise was often engaged in service projects. She joined Interact, organizing school dances in support of local food pantries. In 1990, at the age of sixteen, Denise left her home state of New York for a year as Rotary Youth Exchange Student to Tasmania (Australia), becoming one of the first students with a mobility disability to successfully complete an exchange. She is now a proud member of the Colonie-Guilderland Rotary Club, serving two terms as President (2016-2018). She also served as the 2022-2023 District Governor for District 7190 (Capital Region Rotary).

Denise is also a member and past president of the Fort Orange Toastmasters and The College of Saint Rose Alumni Association. In 2021, she was appointed as the Alumni Representative to The College of St. Rose Board of Trustees.



Since 1972

Protect income and assetsPreserve Medicaid and SSIPlan for the future



Income too high for Medicaid?

Pooled trusts protect income and assets to help people with disabilities and older adults qualify and maintain finanical eligibility for Medicaid and other means-tested benefits. This allows them to afford to pay monthly bills and make life-enhancing purchases that enable them to live at home and thrive in their community for as long as possible.

Serving every county of New York for over 50 years

(518) 439-8323 | www.nysarctrustservices.org



FRANK MELIA, CMPS DIVISION MANAGER | NMLS# 62591

516.879.7262 FMELIA@CONTOURMTG.COM

List of our services.

- Irrevocable Trust Borrowing Options
- Life Estate Borrowing Options
- Revocable Trust Borrowing Options
- Guardianship Borrowing Options
- Conventional Mortgages Purchase & Refinance
- Jumbo Mortgages Purchase & Refinance
- V.A. Mortgages Purchase & Refinance
- F.H.A. Mortgages Purchase & Refinance
- Non-QM Mortgages Asset Depletion Loans, No Tax Return Loans
- Home Equity Conversion Mortgages aka: reverse mortgages
- Jumbo Reverse Mortgages
- Commercial Mortgages Purchase & Refinance



Contour Mortgage Corporation, 990 Stewart Avenue, Suite 660, Garden City, NY 11530. This is not a commitment to lend. Restrictions apply. | Licensed Mortgage Banker – NYS Department of Financial Services Mortgage Banker License #B500843. (NMLS #34384 nmisconsumeraccess.org)



CDPHP[®] Makes Choosing the Right Medicare Plan Easy

CDPHP Medicare highlights:

- Get up to \$1,500 for dental services to use at any dentist on an easy-to-use prepaid benefits card
- Up to \$100 per quarter for over-the-counter (OTC) products at thousands of retail locations
- **\$0 for hundreds of medications** at preferred retail pharmacies
- Plans starting at \$0
- In-home support for companionship, help around the house, transportation, and more
- Enjoy the flexibility of a PPO* plan and see any doctor in the United States that accepts Medicare

We'll help you find the plan that works best for you. Call (518) 641-3400 $(TTY 711)^{\dagger}$

A plan for life.

CPHP

Visit CDPHP on the web at www.cdphp.com/medicare.

* Out-of-network/non-contracted providers are under no obligation to treat CDPHP Medicare Advantage members, except in emergency situations. Please call our customer service number or see your Evidence of Coverage for more information, including the cost-sharing that applies to out-of-network services.

⁺ Our hours are 8 a.m. - 8 p.m. seven days a week from October 1 - March 31. From April 1 - September 30, Monday – Friday, our hours are 8 a.m. - 8 p.m. A voice messaging service is used weekends, after-hours, and federal holidays. Calls will be returned within one business day.

CDPHP® refers to Capital District Physicians' Health Plan, Inc. and CDPHP Universal Benefits,® Inc. CDPHP is an HMO, PPO, and HMO SNP plan that contracts with the federal government. Enrollment in CDPHP Medicare plans depends on contract renewal.

Based on a Model of Care review, Capital District Physicians' Health Plan, Inc. has been approved by the National Committee for Quality Assurance (NCQA) to operate a Chronic or Disabling Condition Special Needs Plan (C-SNP) through 12/31/2024.

Y0019_24_27804_M





Experts in Navigating Care

Who We Are

EverHome Care Advisors is a team of passionate, caring Aging Life Care Professionals[™] who have knowledge, skills and expertise in health, aging and the disabled populations. What separates us from other professionals is we provide high touch care and utilize innovative technology that enhances the client's quality of life. When you call, you get answers, not just another referral. We serve individuals in the greater Capital Region, the Hudson Valley, North Country and beyond.

What We Do

We partner with you to assist your families and clients in navigating a complex and fragmented care delivery system. We solve everyday problems faced by individuals who want to stay in their home. The EverHome team:

- Provides in-home assessments, care planning and ongoing monitoring and care coordination
- Educates individuals and families to make informed decision regarding their care
- Teaches individuals and caregivers how to adopt technology that will keep them in their own home

Our Technology Focuses On

- Teaching caregivers how to easily adopt adaptive technology, to coordinate daily care needs and communicate in real time to the care team
- Using sensor technology and alerts to address care issues for immediate intervention
- Providing direct access to tele-health MD visits
- Reducing social isolation and addressing social determinants of health

VISIT OUR BOOTH TODAY! www.everhomecareadvisors.com | (844)633-3852

STRUGGLING TO CARE FOR AGING PARENTS?

BOSS: Taking time off again?

> CHILD: I need...

SPOUSE: I want...



For those who can't manage it all, VivaLynx has solutions!

Cooking?

Cleaning?

VivaLynx provides caregivers real information in real time, combining our mobile app with interactive technology to effectively manage care in the home. From daily virtual visits to medication management, to fall prevention and even emergency telemedicine, ensure that your loved one is safe and secure while living your life to the fullest.



Yardwork?

I CAN'T MANAGE IT ALL!

> VivaLynx relieves caregiver burnout!



Visit our Booth today! 1-800-NEED-TLC or 1-800-633-3852

PLANTING THE SEEDS FOR A SECURE FUTURE.

ADVISORS INSURANCE BROKERS, ALONG WITH CARRIER PARTNER, NATIONWIDE FINANCIAL, IS PROUD TO ONCE AGAIN BE A SPONSOR OF AND PRESENTER AT THE 29^{TH} ANNUAL ELDER LAW FORUM.

Advisors Insurance Brokers is a nationally recognized insurance brokerage firm that specializes in finding **best in class insurance solutions** to fit our advisors' clients' **extended care**, income protection, life insurance, and overall retirement & estate planning needs.

Representing over **40 different insurance and annuity carriers**, we help advisors and clients – both individuals and businesses – **objectively evaluate** many potential insurance solutions to find the most suitable fit for their situation.

WANT A QUOTE OR PROPOSAL? WANT A REVIEW OF AN EXISTING POLICY? CONTACT US, OR HAVE YOUR ADVISOR CONTACT US TODAY AT: <u>800.695.8224 – Option 2</u>





AN INTEGRITY COMPANY



11 Executive Park Drive, Clifton Park, NY 12065 800.695.8224 WWW.ADVISORSIB.COM

The right home care provides peace of mind every day.

The peace of mind that comes from having a true partner in securing your care.

At **COMMUNITY CARE**, we are by your side every step of the way, from initial enrollment to helping you find the right type of care for you. And the care doesn't stop there. We stay by your side to make sure you receive the customized service you deserve - every day.

Licensed Home Care Services Agency Various levels of care, including PCA, HHA, Nursing, NHTD and TBI Waiver.

Consumer Directed Personal Assistance Program - CDPAP/CDPAS

For Medicaid recipients who prefer to direct their own care and choose their own caregivers.





"Our personal and professional experience with Community Care has been very positive. The staff is transparent and empathetic. We are happy to remain with the Community Care Family..." - S. Kerrigan



CONTACT US TODAY TO GET STARTED! 888.401.4539 communitycarehhs.com info@communitycarehhs.com



Everyone's Our MVP

See how MVP treats you like our Most Valuable Person. Take a closer look at your health coverage options today.

Visit mvphealthcare.com or call 1-800-TALK-MVP.

Health benefit plans are issued or administered by MVP Health Plan, Inc.; MVP Health Insurance Company; MVP Select Care, Inc.; and MVP Health Services Corp., operating subsidiaries of MVP Health Care, Inc. Not all plans available in all states and counties. CDPAANYS is leading the fight to save the Consumer Directed Personal Assistance program (CDPAP) against the forced closure of hundreds of locally owned and operated fiscal intermediaries serving nearly 250,000 disabled and older New Yorkers.



One single statewide FI is not the answer!

Learn more: www.cdpaanys.org

OUR MEMBERS:

- Fiscal Intermediaries
- Allied Organizations
- Consumers & Advocates

CONTACT US

518-813-9537 www.cdpaanys.org 119 Washington Ave #300 Albany, NY 12210



Loudonville Assisted Living Residence An elegant and thoughtful neighborhood of care. Family owned and operated for more than 50 years.



Assisted Living - Enhanced Assisted Living - Memory Care

298 Albany Shaker Road, Loudonville, NY 12211 loudonvillealr.com

Always right by your side.

Through every chapter in life, we're proud to be a partner you can count on.

Highmark is proud to support the 29th Annual Elder Law Forum.



HIGHMARK. 💱

Highmark Blue Shield is an independent licensee of the Blue Cross Blue Shield Association.



The Legal Project, Inc. is a private, independent, not-for-profit law firm founded by the Capital District Women's Bar Association in 1995.

At The Legal Project, we envision a world where all people have access to justice and equal protections under the law. We do this by advising, advocating for and representing people who have traditionally had difficulty obtaining legal assistance.

Through partnership with MVP Health Care, we are proud to highlight our Elder Law Assistance Program which provides free legal services to eligible seniors in the Capital Region.

24 Aviation Rd. Ste. 101, Albany, NY 12205 | 518-435-1770 | www.legalproject.org

Be Kind. Be Curious. Be the Difference.

Adhere360[™]

Improving Medication Adherence Through High-Touch Care

The Adhere360 Program provides valuable tools to increase access and adherence for patients on multiple medications. An experienced Patient Advocate reviews the patient's medications and contacts their prescribers. Our pharmacy team groups medication in personalized pouches and schedules convenient **FREE** delivery.

For additional information, please contact mschobert@parkviewhs.com or visit:





parkviewhs.com/specialties/pharmacy-at-home



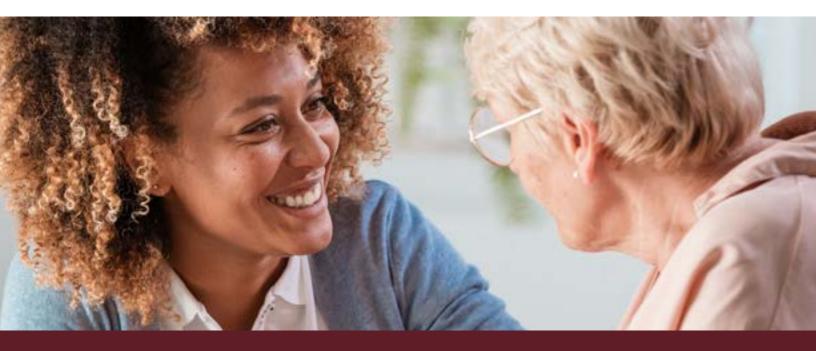
Established in 1978, the New York State Adult Day Services Association (NYSADSA) works to further the adult day services industry and its beneficial effects on society by supplementing and supporting individual programs and affiliated organizations. We provide services and programs for the state and national scope.

NYSADSA is comprised of individuals, single-site programs, multiple-site programs, professional organizations, and supporters in New York State. We are primarily engaged in educating and being the voice of the adult day services community within the boundaries of New York State. Our professional organization members are engaged in allied businesses, supply goods and services to members of NYSADSA, and are all supportive of the aims and goals of NYSADSA.

Contact us to learn how you can join our active, professional, and vocal team of advocates: 518-867-8839 | nysadsa@leadingageny.org | nysadultday.org

THIS YEAR'S SPONSORS







CONTINUING EDUCATION CREDITS FOR SOCIAL WORKERS OFFERED TODAY BY THE **CENTER FOR INDEPENDENCE OF THE DISABLED, NY.**

THANK YOU TO EVERYONE WHO MADE THIS YEAR'S FORUM HAPPEN.

SEE YOU NEXT YEAR FOR THE **30TH ANNUAL ELDER LAW FORUM.**



Follow Us For More Information and Upcoming Events

