

A photograph of a large conference room with round tables and a speaker at the front. The room is filled with people seated at tables, and a man in a suit is standing at the front, addressing the audience. The room has a high ceiling with a chandelier and large windows.

# *30th Annual* **ELDER LAW FORUM**

MAY 15th, 2025  
8:00AM - 4:00PM

## **THE FUTURE OF HEALTH & LONG-TERM CARE IN NEW YORK:**

Confronting Challenges, Shaping Solutions,  
Empowering Care.

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

Thank You to Our Print Sponsor:





# WELCOME

Pierro, Connor & Strauss is proud to host this milestone 30th Annual Elder Law Forum - having assembled leaders in health care, government, Elder Law, long-term care and finance to address the most critical issues facing older adults and individuals with disabilities in New York State.

For 30 years the Forum has brought pressing issues to the forefront, and continues to bring together people passionate about finding ways to identify problems and craft solutions.

With looming federal budget cuts threatening Medicaid and essential services, and continued shortages of staff and resources plaguing our care delivery systems, the Forum will examine New York's newly passed state spending plan to assess whether it can meet the needs of our aging and disabled populations in the future.

We'll also examine the rocky CDPAP transition and ongoing workforce shortages in both home care and facility settings. Through these challenges, we'll spotlight innovative, all-inclusive models of care and new insurance product initiatives - both public and private - that aim to deliver quality, independence, and sustainability for those we serve.

Our agenda is ambitious, but our amazing speakers have generously lent their expertise and time to provide insights into the challenges ahead. As always, this Forum is about more than identifying problems—it's about building actionable solutions and shaping the future of elder care in New York.

**Thank you for joining us in this landmark year as we continue to push forward, together.**



## 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

(518) 459-2100

### New York City

(212) 661-2480

### Garden City

(516) 874-0959



Offices also in: Hudson, Lake Placid, Ronkonkomo, Clark, NJ, and serving clients in FL, MA, HI

[www.pierrolaw.com](http://www.pierrolaw.com)



- 8:00AM Registration: Exhibitors and Networking, Coffee**
- 8:30AM Welcome, Overview**  
- Louis Pierro, Esq., Pierro, Connor & Strauss – Forum Host
- 8:40AM State Legislative Update**  
Dr. Benita Zahn, Certified Health and Wellness Coach – Moderator  
- Cordell Cleare, 30th Senate District, Chair, Committee on Aging; Member, Committee on Social Services  
- John McDonald, 108th Assembly District, Chair, Committee on Governmental Operations; Member, Committee on Health  
- Scott Bendett, 107th Assembly District, Member, Committees on Aging, Insurance, Small Business
- 9:30AM Federal Legislative Update**  
Dr. Benita Zahn, Certified Health and Wellness Coach – Moderator  
- Paul Tonko, NYS 20th Congressional District, joins us from the House of Representatives in Washington DC
- 10:00AM State Leaders: Update from the Executive Branch**  
- Greg Olsen, Acting Director, NYS Office for the Aging  
- Willow Baer, Acting Commissioner, Office for People With Developmental Disabilities
- 10:40AM Coffee Break: Exhibitors and Networking**  
Visit our Exhibitors and Qualify for our Apple Watch Raffle
- 11:00AM Medicaid Update**  
- Valerie Bogart, Esq., Of Counsel, Evelyn Frank Legal Resources Program, New York Legal Assistance Group
- 11:40AM Panel #1 – PACE: Is “All-Inclusive Care” a Model for the Future?**  
Louis Pierro, Esq., Founding Partner, Pierro, Connor & Strauss – Moderator  
- Michelle Mazzacco, Executive Vice President, Continuing Care Network, St. Peter’s Health Partners  
- Michael Flaherty, Executive Director, Eddy SeniorCare PACE, St. Peter’s Health Partners  
- Linda Spokane, President & Program Director, PACE at Hudson Headwaters  
- Valerie Osborn, Director, DSNP Strategy & Government Programs, MVP Health Care  
- Becky Preve, Executive Director, Association on Aging in New York
- 12:40PM Networking Lunch, Koi Pond at the Desmond**  
- Visit our Exhibitors and Qualify for our Apple Watch Raffle.  
- Virtual Attendees: interact online over lunch
- 1:30PM Panel #2 - Insuring Long-Term Care – Private/Public Alternatives to Medicaid**  
Louis Pierro, Esq., Founding Partner, Pierro, Connor & Strauss – Moderator  
- Shelley Mayer, 37th Senate District, Sponsor of Bill S1179, *New York Long Term Care Trust Act*  
- Shawn Britt, Director, Long-Term Care Initiatives, Advanced Consulting Group, Nationwide  
- Robert Vandy, President, Advisors Insurance Brokers  
- Howard Krooks, Chair, Elder Law Practice Group, Cozen O’Connor; Past President of NAELA
- 2:30PM Panel #3 – Medicaid Home Care in Transition**  
Aaron Connor, Esq., Managing Partner, Pierro, Connor & Strauss – Moderator  
- Frank Hemming, Esq., Partner, Pierro, Connor & Strauss  
- Al Cardillo, President & CEO, Home Care Association of New York State  
- Valerie Bogart, Esq., Of Counsel, Evelyn Frank Legal Resources Program, New York Legal Assistance Group  
- Sarah Grimes, Director of Business Development, NYSARC Trust Services  
- Suzanne Paolucci, LCSW, Owner & Operator, NY Care Consultants
- 3:30PM Q&A, Closing Remarks**  
- Louis Pierro, Esq., Pierro, Connor & Strauss – Forum Host  
- Raffle Drawing





## **LOUIS PIERRO, ESQ.**

*Founding Partner, Pierro, Connor & Strauss, LLC*

Lou Pierro is the Founder and Principal of Pierro, Connor & Strauss, LLC with offices in the Capital Region, New York City, Lake Placid, Hudson and Long Island, and serves clients in Florida, Massachusetts, Connecticut, New Jersey and Hawaii. Lou 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 on legal issues relating to estate planning, elder law and business planning.

In addition to the law firm, Lou founded ApolloCare, LLC, a business that integrates home care coordination (EverHome Care Advisors), with connected home health technology (VivaLynx) providing seniors, families, and caregivers unique opportunities to live independently in their own home. From 2007 to 2021, he was also a Founder and Principal of ElderCounsel, a national membership organization of Elder Law and Special Needs law firms providing proprietary document drafting software and education to over 1400-member firms in all 50 states.

Lou has been selected by his peers for inclusion in the 2025 edition of The Best Lawyers in America for Elder Law, Litigation – Trusts and Estates, and Trusts and Estates—his 17th year of recognition. In 2024, he was honored by Super Lawyers for the 18th year in the Capital Region and, for the first time, in the New York Metro region - a distinction awarded to no more than 5% of attorneys in the state. He has also been named to 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. Lou has maintained an AV Preeminent rating from 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.



## **DR. BENITA ZAHN, NBC-HWC**

*Certified Health and Wellness Coach*

Benita Zahn is a certified Health and Wellness coach working with clients at Capital Cardiology Associates. Benita spent more than 40 years as a health reporter and news anchor at WNYT in Albany, NY. She covered issues such as wellness, treatment breakthroughs, aging, nutrition and the latest health care trends. Benita's work has taken her around the world and across the USA. She's covered the aftermath of Hurricane Sandy, Hurricane Katrina, the inauguration of President Obama and both Republican and National Conventions.

Benita is a contributor to the weekly "Live Smart" page in the Times Union, the HMRRC Pacesetter and the new magazine 55+LIVING. Benita also created and co-hosts the podcast EVERYTHING THEATER.

Benita earned her Master's and Doctorate in Bioethics at the Alden March Bioethics Institute at Albany Medical College. She earned her CHWC from the prestigious WELLCOACHES School of Coaching. She is a member of Actors Equity Association and SAG-AFTRA (The Screen Actors Guild – American Federation of Television and Radio Artists). Benita has won numerous awards for her work including a NY EMMY, International Radio and Television Award, NYS Broadcasters Award and has been honored by numerous health organizations.





## **CORDELL CLEARE, NEW YORK STATE SENATE, DISTRICT 30**

*Chair, Committee on Aging; Member, Committee on Social Services*

New York State Senator Cordell Cleare was raised in Harlem and her family has lived there for four generations. Cleare is a product of the New York City public schools, including Brooklyn Technical High School. Today, she is best known for her fight for Reparations, Truly Affordable Housing, Quality Schools & Equitable Education, Access to Healthy Foods as well as Economic, Environmental, Restorative and Racial Justice. She entered the New York State Senate on an express train from Upper Manhattan, bringing fresh ideas and legislative proposals to make New York, the state of the whole people.

Cleare's activism and advocacy spans decades but initially peaked when she served as a tenant organizer and Chair of the New York City Coalition to End Lead Poisoning. In these years and within related civic leadership roles, she fought hard to protect children from the life-threatening dangers of lead paint, leading to shaping a significant public policy - The Childhood Lead Poisoning Law (Local Law 1/2004 in New York City). This law is now a national model.

In 2024 Senator Cleare introduced over 300 Bills, 60 of which passed the Senate and 27 of which became law. Senator Cleare has Chaired the Aging Committee since 2023 and during her tenure great progress has been made in closing the waitlist for senior services, expanding visits by the LTCOP Program and expanding Senior Housing & NORCs.



## **JOHN MCDONALD III, NEW YORK STATE ASSEMBLY, DISTRICT 108**

*Chair, Committee on Governmental Operations; Member, Committee on Health*

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 94 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.





## **SCOTT BENDETT, NEW YORK STATE SENATE, DISTRICT 43**

*Committees on Aging, Insurance, Small Business*

Scott Bendett was elected to the New York State Assembly on November 8, 2022. His district is comprised of parts of Columbia, Rensselaer, and Washington counties, as well as the town of Bethlehem in Albany County.

Committed to common-sense and effective solutions, Scott is prepared to bring his successful background in private business and public service to Albany. As a former county legislator, he understands the issues that matter most to residents and will work to lower the tax burden crushing New Yorkers and usher in support and resources for community services critical to those in need. Scott is committed to improving New York's economic future and recognizes the importance of supporting the struggling small-business community by reducing excessive rules and regulations to improve opportunities for economic growth. Scott values the importance of community and will advocate for greater investment in programs aimed at helping our youth and those in need.

Scott, a business owner with more than 25 years of experience, is the founder of Habana Premium Cigar Shoppe. His small-business success story started with a few cigars and a small kiosk at the mall before growing into an international online marketplace. In addition, Scott is the CEO of Bendett Investment Group, a real estate development corporation. He has dedicated countless hours as a counselor and mentor to numerous business ventures and non-profit organizations.

His endless dedication to his community includes multiple advocacy efforts for Capital Region organizations including the MDA, Center for Disability Services, Best Buddies, and the Arthritis Foundation. He is the President of the Averill Park Education Foundation, which has helped numerous students achieve their dreams. Scott has proudly extended his mentorship to assist Eagle Scouts including his son, Samuel. He has been a member of the town of Sand Lake's Zoning Board of Appeals and served as a Rensselaer County Legislator prior to his election.



## **PAUL TONKO, U.S. HOUSE OF REPRESENTATIVES**

*20<sup>th</sup> Congressional District*

Congressman Paul D. Tonko is a ninth-term member of the U.S. House of Representatives, representing New York's 20th Congressional District in the Capital Region, including the cities of Albany, Amsterdam, Schenectady, Troy, Saratoga Springs.

He has dedicated his career in public service to bettering the lives of those in his district with meaningful legislation that creates good jobs, strengthens the middle class, and drives economic opportunity. Tonko is the Ranking Member of the Energy and Commerce Subcommittee on Environment, in addition to serving on the Energy and Commerce Subcommittee on Energy and Subcommittee on Oversight & Investigations.

This 119th Congress, he was selected to serve on the House Committee on the Budget. He also serves as Democratic Deputy Whip for Policy that works on the coordination and planning of the House Democratic Caucus's policy. Along with his committee duties, Tonko co-chairs the Sustainable Energy and Environment Coalition (SEEC), and the Addiction, Treatment, and Recovery (ATR) Caucus.

Prior to serving in Congress, he was the president and CEO of the New York State Energy Research and Development Authority. Before that, he served in the New York State Assembly for 25 years, serving for 15 years as Chairman of the Committee on Energy.

Tonko graduated from Clarkson University with a degree in mechanical and industrial engineering and is a former engineer for the New York State Public Service Commission.





## **GREG OLSEN**

*Acting 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 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.



## **WILLOW BAER**

*Acting Commissioner, Office for People With Developmental Disabilities*

Prior to stepping up as Acting Commissioner, Willow served as OPWDD's Executive Deputy Commissioner and oversaw the agency's operational management, including planning, fiscal planning and oversight, and policy development. She was also responsible for 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.

Willow has served twice as Assistant Counsel to Governor Kathy Hochul, overseeing legal priorities and legislation across the fields of Human Services and Mental Hygiene. Additionally, Willow previously 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. She earned a Juris Doctor at Albany Law School.

Willow has spent her entire career working to protect and advocate for underrepresented populations. She will continue the agency's work to ensure that New York is a state that is inclusive, supportive, and one that those with developmental disabilities live with meaningful choice and are proud to call home.





## **VALERIE BOGART**

***Of Counsel, 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.



## **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 40 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, home based primary care, Care Transitions Coaches, Eddy Health Alert, Empire Home Infusion pharmacy and Northeast Home Medical Equipment. Michelle's current role includes The Eddy's skilled nursing facilities (providing respite, short term rehab and long term care), and senior living (including independent retirement communities, adult homes and memory care centers).

Michelle 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.

Michelle 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.





## **MICHAEL FLAHERTY**

***Executive Director, Eddy SeniorCare PACE***

Michael Flaherty joined Eddy SeniorCare PACE in 2011 as a Physical Therapist after successfully operating a small business in New York State for 10 years. Progressing through the ranks from Rehabilitation Supervisor to Director of Clinical Operations, and now Executive Director, he has overseen the program's growth from 125 to over 450 participants in the Capital District. Leading a passionate team for one of the most comprehensive long-term care programs in the area drives him each day.

In 2000, Michael helped lead a team to open Eddy SeniorCare's second Program of All-Inclusive Care for the Elderly (PACE) at St. Joseph's Provincial House in Latham. Over three months, the program enrolled over 70 sisters living on the campus, providing 24-hour support throughout the pandemic. Despite COVID-19 challenges, Eddy SeniorCare continued to enroll participants at rates higher than most other PACE programs nationwide.

Michael holds a Bachelor of Clinical Science and a Master of Science in Physical Therapy from Ithaca College. He began his career at the University of Maryland Shock Trauma Center in Baltimore before returning to the Capital District to obtain his MBA from the University of Phoenix. His goal is to continue growing the PACE program to help seniors delay or avoid the need for facility placement.



## **LINDA SPOKANE**

***President and Program Director of PACE at Hudson Headwaters***

Linda Spokane is the President & Program Director of PACE at Hudson Headwaters, a PACE program affiliated with Hudson Headwaters Health Network, a Federally Qualified Health Center serving over 157,000 patients per year across 7,900 square miles of the Adirondacks. She is dedicated to expanding the scope of The Program of All-Inclusive Care for the Elderly (PACE) services across select zip codes in Saratoga, Warren, and Washington counties. PACE is a community-based program that provides coordinated medical and social services to eligible older adults who want to continue living in their own home despite chronic care needs. The PACE at Hudson Headwaters team works with each participant to develop a care plan that promotes independence and the highest quality of life while allowing choice and dignity for participants and their families.

Linda has spent the past four years navigating the PACE application and approval process, working with the NYS Department of Health and CMS, to open the first new PACE program in New York in over a decade. Most PACE participants are dual-eligible, meaning they qualify for both Medicaid and Medicare although there are also private pay options. PACE is responsible for managing and paying for all services delivered to participants.

Prior to her PACE role, Linda was the Vice President of Population Health for Hudson Headwaters, overseeing the Care Management, Quality Improvement, Nutrition, and Food as Medicine programs. Before joining Hudson Headwaters in 2017, Linda worked at MVP as the Director of Analytics, and at Leading Age NY, an association for non-profit long-term care providers, heading up their Research & Analytics team.

Linda received her bachelor's degree in economics from Cornell University, and her master's degree from the University at Albany's School of Public Health.





## **VALERIE OSBORN**

*Director, DSNP Strategy & Government Programs, MVP Health Care*

Valerie Osborn is a seasoned Medicare sales leader with 15+ years of experience driving growth and transforming teams. As Director of DSNP Strategy at MVP Health Care, she has led the charge in expanding Dual Special Needs Plans (DSNP) across New York State, ensuring members have access to quality health care while creating healthier communities. Her expertise in Medicare Advantage and DSNP has made her a trusted resource to her partners and sales teams looking to elevate their performance and deliver exceptional customer experiences.

Valerie is renowned for crafting effective sales strategies, mentoring high-performing teams, and fostering success-driven cultures. Valerie thrives on empowering sales professionals through education, coaching, and innovative strategies that drive measurable success. A passionate mentor and expert in DSNP and Medicare Advantage, Valerie embodies being the difference for her customers. She earns their trust every day.

As an engaging and passionate speaker, Valerie brings real-world insights and infectious energy to every stage. Whether leading teams or addressing industry audiences, she has a unique ability to inspire, educate and transform the way people think about Medicare Advantage and DSNP.

Outside of work, Valerie is equally dedicated to her family and serving the aging population by serving on multiple boards. Whether it's her commitment to her customers and team members, or her passion and dedication to the aging population, it all comes back to helping people be their best and live their healthiest lives.

Valerie earned her bachelor's degree in business from SUNY Albany School of Business in Albany, N.Y.



## **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 grassroots 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 regarding 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 Bachelor 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.





## **SHELLEY MAYER, NEW YORK STATE SENATE, DISTRICT 37**

*Chair, Committee on Education, Member, Committees on Finance, Judiciary*

Shelley Mayer is an experienced and progressive leader who has spent her career as an advocate for New Yorkers. Having heard from many constituents over the years regarding the costs of long term care and long term care insurance, and recognizing a lack of options currently available to pay for care, Senator Mayer sponsors a bill in the state Senate, S1179, which would establish the New York long term care trust program to provide long term care benefits to eligible New Yorkers.

She has been a champion for children and families with a strong commitment to K-12 education throughout her career as an attorney, Assistant Attorney General and New York State Legislator. Shelley was elected to the New York State Senate to represent the 37th Senate District in Westchester in April 2018, and was subsequently re-elected in November 2018, 2020, 2022, and 2024. In 2019, Shelley was appointed to serve as the Chair of the State Senate Education Committee. Previously she served in the New York State Assembly representing the city of Yonkers, New York State's third largest city.

Earlier in her career, Shelley served as Chief Counsel to the New York State Senate Democrats, as Senior Counsel at the National State Attorney General Program at Columbia Law School, and as Vice President of Government and Community Affairs at Continuum Health Partners (previously St. Luke's-Rosevelt Hospital Center and Beth Israel Medical Center), some of New York City's largest teaching hospital systems, working to protect Medicaid and Medicare services and improving the relationship between New York City's diverse communities and the hospital system.

From 1982 to 1994, Shelley was an Assistant Attorney General in the office of New York Attorney General Bob Abrams where she handled major reproductive health litigation. Shelley served in the Civil Rights Bureau, as Chief of the Westchester Regional Office, as the legislative liaison for the Attorney General, and ultimately as a senior advisor to the Attorney General.

Shelley received a JD from SUNY Buffalo School of Law in 1979 and a Bachelor of Arts from UCLA in 1975.



## **SHAWN BRITT**

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

Shawn Britt, CLU®, CLTC®, has been engaged in the life insurance and long-term care industry since 1995. She joined Nationwide in 2000 and has been a member of Nationwide's advanced consulting team since 2005. Shawn has been a major influence in the development and promotion of Nationwide's suite of long-term care products. Shawn specializes in case design and using advanced concepts in long-term care planning for individuals, couples, business owners, the affluent and the high net worth.

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, The National Underwriter, Financial Advisor, Center for Long-Term Care Reform, The Wall Street Journal, CBS New Money Watch, Market Watch Radio and LifeHealth-Pro.

Shawn is a frequent presenter and key note speaker at numerous industry events and conferences including LIMRA, Finseca and ILTCI. She has served on the Board of Advisors for CLTC and currently serves as a CLTC contributor. Shawn also serves on industry committees in regard to state and federal LTC legislation. Shawn graduated from Bowling Green State University, served for several years as an adjunct professor at The Ohio State University and has 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.

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.



## **HOWARD KROOKS, ESQ.**

*Chair, Elder Law Practice Group, Cozen O'Connor*

With over 30 years of legal experience, Howard's practice is comprehensive, covering 3 jurisdictions (New York, Florida and Pennsylvania) and includes estate planning, wills and trusts, elder law, special needs planning, planning for disability, asset protection planning, Medicaid planning, trust and estate administration (probate), fiduciary litigation, guardianship and health care/financial planning with advance directives. Howard's commitment to excellence and deep understanding of complex legal issues are the cornerstones of his practice, guiding clients through critical life decisions and securing their futures with unwavering confidence.

Howard is certified as an elder law attorney by the National Elder Law Foundation, a Past President of NAELA, a past Chair of the New York State Bar Association Elder Law Section, and a past Chair of the Florida Bar Elder Law Section. He was recognized for serving as co-chair of the NYSBA Elder Law Section Compact Working Group, which received national attention for developing alternative methods of financing long-term care. Howard received an award for spearheading the effort on behalf of NAELA seeking the enactment of the Special Needs Trust Fairness Act, which was signed into law by President Obama on December 13, 2016.

Howard is a frequent lecturer and has addressed many organizations in New York, Florida and Pennsylvania as well as nationally. He has been quoted in The Wall Street Journal, The New York Times, Kiplinger's, USA Today, The New York Post, Newsday, The Journal News, and the Boca Raton News. Howard has appeared on PBS, the CBS Early Morning Show, and local elder law-focused television programs and has been published nationally on the topic of elder law.

Howard earned his bachelor's degree in accounting from SUNY Albany and his law degree from the University of Pennsylvania Law School.





## **AARON CONNOR, ESQ.**

*Managing Partner, Pierro, Connor & Strauss, LLC*

Aaron Connor is a seasoned litigator, currently concentrating in the areas of guardianship, will/trust contests and other estate related litigation. Aaron regularly handles complex trust and estate litigation matters and assists clients in obtaining their fair share through discovery, litigation, and negotiation. 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 to age successfully, which can include Medicaid planning and, for individuals with disabilities, Special Needs planning.

In addition, Aaron advises clients on strategies to avoid probate and provides comprehensive guidance in estate and trust administration, including representation in Surrogate's Court throughout the Capital District. He employs advanced estate planning techniques to establish tax-efficient structures that minimize estate taxes and facilitate charitable giving.

Aaron has been selected for inclusion in the 2025 edition of The Best Lawyers in America in the practice areas of Elder Law, and Litigation – Trusts and Estates. Recognition in Best Lawyers® is widely regarded by both clients and legal professionals as a significant honor, conferred on a lawyer by his or her peers.

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.



## **FRANK HEMMING III, ESQ.**

*Partner, Pierro, Connor & Strauss, LLC*

Frank Hemming joined Pierro, Connor & Strauss in 2015 as an Associate Attorney and was promoted to Senior Associate. Due to his achievements in the field of long-term care and Medicaid planning as well as his leadership and recognition among colleagues and clients, Frank was named a Partner in 2024.

Frank concentrates his practice on guiding clients to prepare and file both community and chronic care Medicaid applications. In preparation for long-term care planning, he assists with estate planning and asset protection planning. In addition, Frank is highly experienced in all aspects of special needs planning by creating plans for individuals with disabilities to establish advance directives or guardianships, First or Third Party Supplemental Needs Trusts and to remain qualified for government benefits throughout lifetime.

As a frequent presenter in educational forums, Frank educates individuals and families on asset protection and long-term care planning, and leads the Firm's monthly webinar series, Medicaid Monday. He is also a frequent host on Life Happens Radio, the Firm's weekly program airing on Saturdays at 9am on the WGY iHeart station.

Frank was selected by his peers for recognition as Best Lawyers: Ones to Watch in 2024 for the second consecutive year, and by Super Lawyers as a New York Rising Star in 2021-2024, a selection process where peer nominations and evaluations are combined with independent research reserved for those attorneys who exhibit excellence in practice.

He earned 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. Frank received his Juris Doctor (magna cum laude) from Albany Law School in 2013. While in law school, he 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 Business Development, NYSARC Trust Services*

Sarah Grimes is the Director of Business Development at NYSARC Trust Services, where she has dedicated over eight years educating individuals with disabilities, their families, and professional supports on the benefits of using a pooled trust. With extensive knowledge of supplemental needs trusts and means-tested benefits, she helps beneficiaries navigate complex systems to protect vital services while utilizing trust funds to improve their quality of life. She is a passionate advocate for trust beneficiaries, ensuring they maximize the tools available to them while empowering individuals with disabilities to live more independent and fulfilling lives.

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.



## **AL CARDILLO**

*President and CEO, Home Care Association of New York State (HCANYS)*

Al Cardillo has worked over four decades in the health field. His work includes health services development, administration, legislation, budget, policy, health association management, and education.

He is the President and CEO of the Home Care Association of New York State (HCANYS), a statewide association comprised of several hundred organizations providing home and community-based health and support services to hundreds of thousands of New Yorkers. HCANYS' mission is to promote the quality and accessibility of health care and support at home. HCANYS provides extensive assistance and support to service providers, health plans and allied organizations for the provision of in-home services, along with education, technical assistance, program development, and research. HCANYS also conducts comprehensive state/national legislative, budget and regulatory advocacy, and collaborates with health care sectors across the continuum to promote health access, quality and system performance. HCANYS is also a leader in health innovation through its 501(c)(3) affiliate, HCA Education and Research (HCA E&R), that is currently conducting and directing multiple statewide initiatives in public health and health care delivery.

Al is also an adjunct faculty member teaching in the Public Health Program at the Albany College of Pharmacy and Health Sciences, and in the MSW Program of the University at Albany College of Integrated Health Sciences. He also serves with other educational institutions in academic and mentorship roles.

He serves on numerous state and national professional and governmental advisory committees in health care.

He holds a Master of Social Work Degree in Direct Practice from the University at Albany, and is a New York State Licensed Master Social Worker. He is a recipient of multiple awards and honors.





## **SUZANNE PAOLUCCI, LCSW**

*Owner & Operator, NY Care Consultants*

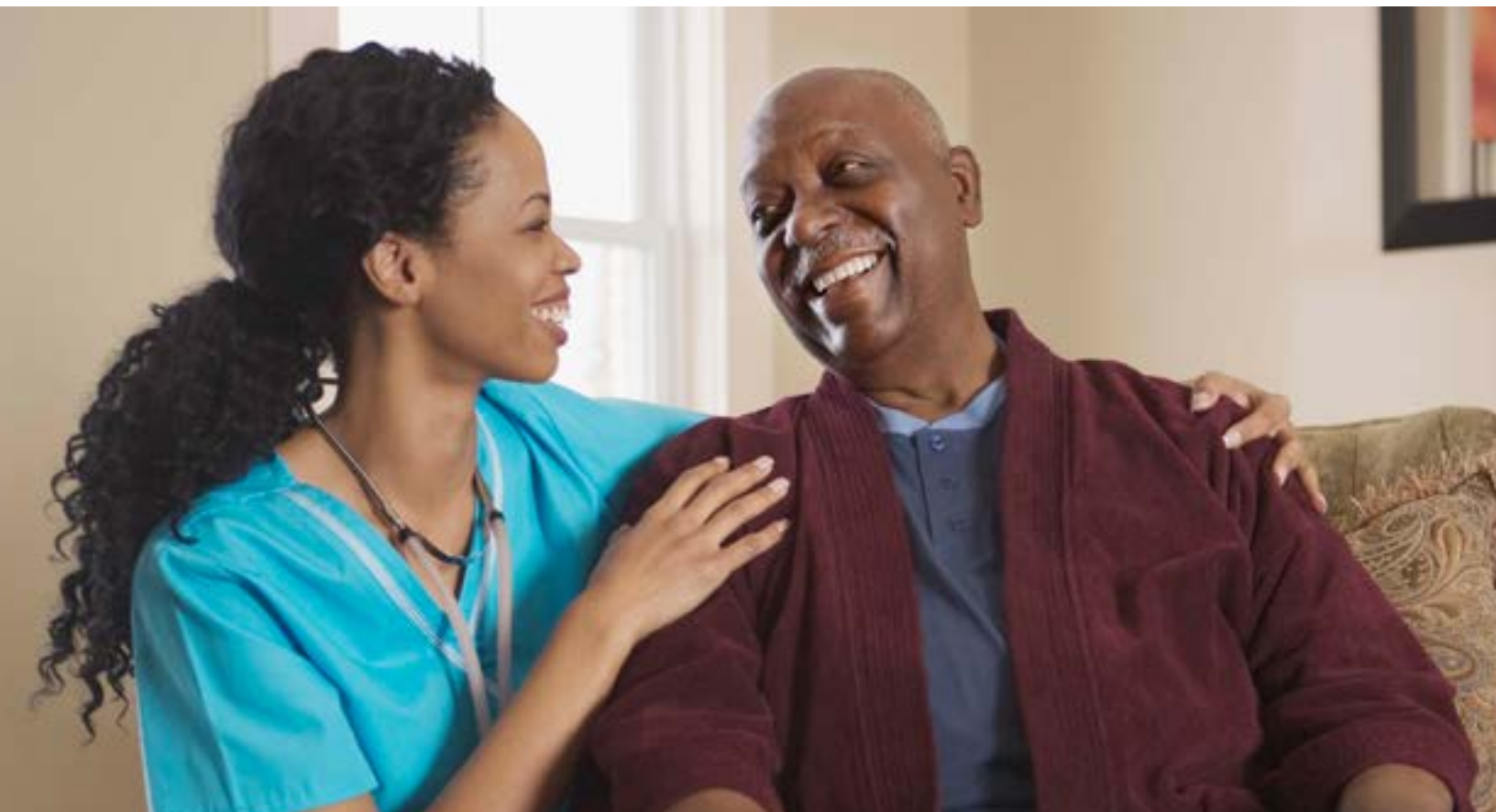
Suzanne Paolucci, a Licensed Clinical Social Worker, has dedicated over three decades to the fields of geriatrics and life care planning. Her extensive career began at Adelphi University School of Social Work from 1990 to 1992. During her time there, she completed a groundbreaking intensive rotating field internship, providing her with invaluable experience across a variety of hospital settings. She graduated with a specialized focus in geriatrics, a commitment that has guided her throughout her professional life as she helps clients navigate the process of aging in place safely and with dignity.

Drawing upon significant experience within both the legal and medical sectors, Suzanne has consistently demonstrated leadership and innovation. In 2009, she pioneered Long Island's first Elder Law Life Care Planning Firm, recognizing the critical intersection of these two fields. Her dedication to enhancing the quality of care coordination led her to co-develop Concierge Care Coordination® in 2015, an approach designed to ensure the highest standards of client support. In 2018, Suzanne established NY Care Consultants, LLC, with the specific aim of assisting clients in navigating the often-complex landscape of Medicaid Managed Care. In these challenging times, NY Care Consultants, LLC has successfully won over 300 appeals, securing person-centered care plans that truly meet the individual needs of their clients.

Earlier this year, driven by a deep personal understanding of the challenges faced by caregivers, Suzanne launched her care coaching service as a heartfelt tribute to her father. This initiative is designed to provide invaluable support and guidance to caregivers, helping them feel less isolated and more empowered as they navigate the complexities of the care continuum.







## Income too high for Medicaid?

Pooled trusts can help older adults qualify financially for Medicaid to pay for home care while protecting their hard-earned income to pay bills and make purchases that allow them to live at home with comfort and dignity for as long as possible.

## Our Services:

- Pooled Trusts (Income & Assets)
- \$300 to establish an account
- 24/7 Online Portal/phone line

Scan to learn more and get started:







**Benefits  
Preserved**  
Est. 1994

☎ 877.695.6444 • 📍 310 S. Twin Oaks Valley Rd. #107-174, San Marcos CA, 92078 • 🌐 [www.cptinstitute.org](http://www.cptinstitute.org)



## Our Services

- First Party Pooled Special Needs Trust
- Third Party Pooled Special Needs Trust
- Settlement Management Trust
- Pooled Income Trust

## Helping you protect the injured and maximize an award by preserving eligibility for Medicaid and SSI

- ✓ **People First:** Our no-cost consultations & education are a key part of our tax-exemption as a 501(C)(3) charity.
- ✓ **Flexible Funding Strategies:** no minimum funding amount, flat monthly costs.
- ✓ **Instant Trust Set-Up:** if scheduled at least 24 hours in advance, trust can be established in 1 business day.
- ✓ **Competitive Flat-Rate Pricing:** designed to keep costs low to help you make the most of your funds.
- ✓ **Open Communication:** Online access to account, mobile app, regular statements, and email/text status notifications.
- ✓ **Immediate Access:** Truelink reloadable VISA Cards provide clients with the autonomy they desire.
- ✓ **Experienced Trustee:** We have served over 10,000 clients since 1994 and operate in 48/50 states (excluding NM & CT).
- ✓ **No-Cost Training and Resources:** Aligned with our tax-exemption, free training and resources are available on various topics to protect those at risk and no longer able to earn a living.
- ✓ **Partnerships with Industry Leaders:** We work well with everyone, including MSA administrators.





## 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 30<sup>TH</sup> 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: 800.695.8224 – OPTION 2**







**FRANK MELIA, CMPS**

DIVISION MANAGER | NMLS# 62591

**516.729.3438**

**FMELIA@CONTOURMTG.COM**



With multiple Mortgage Program choices, your clientele would be best served with a lending professional who can navigate all of the borrowing options. Experience matters!

## *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





## At LifePath, We're Here Every Step of the Way.

We help to guide older adults and their families through the complex maze of aging-related resources. Whether it's housing information, caregiver support or help understanding benefits, we connect people with real answers and real people. Our personalized approach builds trust, eases confusion and ensures no one has to navigate aging alone. In addition, we offer programs and services that support nutrition, socialization and overall well-being—helping individuals to age with independence and dignity, including:

### Meals on Wheels



#### A Warm Meal & A Caring Visit, Right to Your Door.

Our Meals on Wheels program delivers more than just food—we bring nutrition, basic safety checks and a friendly connection to neighbors who need it most.

### Community Dining



#### Where Friendship & Nutrition Come Together.

Mealtime is about more than nourishment—it's about connection and community. At our 10 dining sites, we serve nutritious, dietitian-approved meals in a welcoming setting.

### Social Adult Day Program



#### Empowering Independence, One Day at a Time.

From Albany to Cohoes, our person-centered programs are ready to welcome and support you or your loved one.

### Health, Wellness & Educational Activities



#### Stay Active, Stay Informed, Stay Well.

Through our three Senior Centers in Albany County, LifePath offers welcoming spaces to move your body, engage your mind and connect with others.



# Your Creative Partner

for All Things  
*Print.*

constructive  
copy



24/7 Service  
with **Free Delivery!**

## Printing & Copying

- Fast, modern equipment
- Vibrant full color printing
- Accurate, confidential legal document printing
- Wide range of paper stocks, binding, lamination, and finishing services

## Digital Media

- Scanning and archival services
- Online file transfer and storage
- Duplication of disks and digital media
- Creation of searchable and fillable PDF documents

## Large Format

- Posters, signage, and displays
- Indoor and outdoor banners
- Custom displays and tradeshow media
- Maps, blueprints and architectural renderings
- Variety of materials for nearly every application

## Marketing

- Guidance on advertising and marketing to help make you look good
- Logo and graphic design services available
- Worldwide mailing services

At **Constructive Copy** we offer the most competitive pricing around without cutting corners on quality. We offer professional, confidential printing and data duplication for all your document production needs. We are available 24/7 with free delivery anywhere in the Capital District. With us, every job is a rush job, but without the *rush fee*.

**Give us a call today and let us show you what makes us different from the rest!**

3 Northway Lane North | Latham, NY 12110  
Office: 518.783.6044 | Mobile: 518.330.7653 | Fax: 518.783.3841

**[www.constructivecopy.com](http://www.constructivecopy.com)**



## THE NEXT GENERATION OF HOME HEALTH & SOCIAL CARE

EverHome Care Advisors and VivaLynx combine in-home personal care solutions with virtual home care monitoring, telemedicine and communication with physicians and family. *One solution for all your home care needs.*



### IN-HOME ASSESSMENTS

- CARE PLANNING
- CARE GIVING SOLUTIONS
- HEALTHCARE ADVOCACY



EverHomeCare.com



- VIRTUAL HOME CARE
- CONNECTING FAMILIES
- REMOTE LEVEL TELEMEDICINE
- MEDICATION TRACKING



VivaLynx.com

Visit Our Booth  
**ENTER TO WIN!**





*The Alzheimer's Association, New York State Coalition is proud to support the 30th Annual Elder Law Forum.*

## Alzheimer's Association services include:

### INFORMATION AND REFERRALS

Reliable and accurate information about dementia and community resources.

### CARE CONSULTATIONS

Personalized meetings provide solutions to caregiving challenges.

### SUPPORT GROUPS

Peer- and professionally-led gatherings provide emotional support and disease education.

### EDUCATION PROGRAMS

Information on topics including brain health, the signs of Alzheimer's disease, diagnosis, communication, living with Alzheimer's and caregiving techniques.

### SAFETY SERVICES

Resources for home safety, wandering and other medical emergencies.

**FREE assistance for people with memory loss and those who care for them is available 24 hours a day, 7 days a week at **800.272.3900**.**

This program is supported in part by a grant from the New York State Department of Health.



# LIVE WELL. SHINE ON.





# It takes more than love to care for a loved one.

**Get the caregiving support you need when you need it.**

No one ever hopes to become a family caregiver. But it's a role you and 2.2 million others in New York play every day.

AARP Family Caregiving is here to help. We can make it easier for you to get answers, help you connect with and learn from other family caregivers and guide you to useful resources online and close to home.

**Connect with us at [aarp.org/local](http://aarp.org/local)**

Scan the QR code to learn more.



[f /aarpny](https://www.facebook.com/aarpny) [X @aarpny](https://twitter.com/aarpny)

PROUD TO BE AN ELDER LAW FORUM SPONSOR



## Take the first step to helping your clients find the Medicare plan that works best for them.



Certified Senior Advisor®, Mark Brownstein and his team can help you with the most recent and ever-changing Medicare choices that best suit your clients' specific health and budget needs.

Mark's deep knowledge of Medicare plans make him uniquely qualified to advise even your most complex client needs.

Be sure to visit Mark at this Forum. Call **888-683-6372** or **845-358-1220**. Scan the QR code to visit our website



Not affiliated with the U.S. government or federal Medicare program. We do not offer every plan available in your area. Any information we provide is limited to those plans we do offer in your area. Please contact [Medicare.gov](http://Medicare.gov) or 1-800 MEDICARE to get information on all of your options.





# LiveWell

## Care Management

***Expert guidance*** to navigate the aging experience.

- ◆ Empowering seniors with compassionate, personalized care.
- ◆ Custom care plans and unwavering support, we help seniors thrive and families find peace of mind.
- ◆ Collaborative relationships with other professionals to enhance the value of our clients' lives.

***FOR MORE INFORMATION OR A  
COMPLIMENTARY CONSULTATION***



**914-833-0288**  
**[www.livewellcm.com](http://www.livewellcm.com)**

***Serving New York City,  
Westchester County,  
and Long Island***



**Eddy SeniorCare**

ST PETER'S HEALTH PARTNERS

A Member of Trinity Health

**Comprehensive services to support seniors who  
want to continue living safely in their own homes.**

**Eddy SeniorCare:**

- brings a full range of supplies, equipment and help to your home
- provides in-home personal care, nursing, therapy and social work services
- provides transportation to medical appointments
- gives you "peace of mind" knowing there's a dedicated team to coordinate all your care

**Learn more about Eddy SeniorCare**  
**(518) SUPPORT | [EddySeniorCare.com](http://EddySeniorCare.com)**



We are proud to be a sponsor of the

# 30<sup>TH</sup> ANNUAL ELDER LAW FORUM

We join in the important endeavor to support older adults and individuals with disabilities in New York.

Together we will confront the challenges  
and empower caregivers.



**515 Broadway STE 402  
Albany, NY 12207  
(518)449-7080**

[www.agingny.org](http://www.agingny.org)

The mission of the Association is 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.

<https://linktr.ee/agingny>



# THIS YEAR'S SPONSORS

## PLATINUM SPONSORS

---



**Benefits  
Preserved**  
Est. 1994



**Nationwide®**  
is on your side

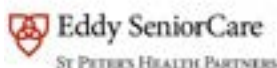
## GOLD SPONSORS

---



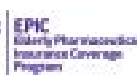
## SILVER SPONSORS

---



## BRONZE SPONSORS

---





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

SEE YOU NEXT YEAR FOR THE  
**31ST ANNUAL ELDER LAW FORUM.**



Follow Us For More Information and Upcoming Events

