www.pbcepc.org

PALM BEACH COUNTY ESTATE PLANNING COUNCIL, INC.

The Resource for Estate Planning Professionals would like to recognize its Board of Directors, Sponsors & Members

2015-2016 BOARD OF DIRECTORS

President
Michael G. Becker
JP Morgan

President-Elect
Cara Lamborn, CFP®
Jones Lowry

Vice-President/Membership
David E. Holland, J.D., CFA, CFP®
Ameriprise Financial

Vice-President/Programming
Michael E. Schmidt, CFA
Seacoast Bank & Trust

Treasurer
Connie A. Eckerle, CPA
Smolin Lupin & Co., LLC

Secretary
Andrew R. Comiter, J.D., LL.M.
Comiter, Singer, Baseman & Braun, LLP

Director
Sharon C. Lindsey, J.D., CAP®
The Lindsey Group

Director
Stephanie L. Murray, CPA
Andersen Tax LLC

Director
Mark R. Parthemer, Esq., AEP®
Bessemer Trust

Andrew Shamp, J.D., LL.M.
Wells Fargo Private Bank

Director, Immediate Past-President
Alison Sih-Crawshaw, T.O.
Comerica Wealth Management

Director
H. Thomas Wagner, Jr., CPA
RSM US LLP

MEMBERS

Jennifer Amarnick
American Cancer Society

Ferial Andre, RN, CCM, CDP, CaEd
Regal Care Management/Regal Home Health

Jeff A. Azis CPA, AEP®
Jeffrey A. Azis, CPA, P.A.

Paul A. Baldovin, Jr., Esq.|
Hodgson Russ LLP

Katherine A. Barski J.D.
Doane & Doane, P.A.

Michael G. Becker
J.P. Morgan

Julie Bedard, CPA, CFP®
Constellation Management Corp.

Aldo Beltrano Esq.
Beltrano & Associates

Arthur L. Bernstein
Richard S. Bernstein Insurance Group

Christine Bialczak, J.D., LL.M.
Alley, Maass, Rogers & Lindsay, P.A.

Peter F. Bono CLU, ChFC®, CFS, RHU®, CRPC, CAP®
Wealth Planning Solutions, Inc.

Kevin Bourke
Bessemer Trust

Tad Boyes
Hein Wealth & Tax Solutions, LLC

William E. Boyes, Esq.
Boyes & Farina, P.A.

Lawrence C Boytano
Burns Nearing Wealth Management Group
Merrill Lynch

Keith B. Braun Esq., AEP®
Comiter, Singer Baseman
& Braun, LLP

Gary Brookmyer, Esq.
Brookmyer, Hochman, Probst & Jonas, P.A.

Jonathan E. Brookshire
Seaside National Bank and Trust

Erik Brown, CLU®
Erik Brown Insurance

Nathan Brown, J.D.
Pillsbury Withrop Shaw Pittman

Robert M. Burns, CFP®, ChFC, AEP®
Burns Nearing Wealth Management Group
Merrill Lynch

Danielle Blangy Cameron, CAP®
Community Foundation for Palm Beach and Martin Counties

Martin Cass CPA, MBA, CVA
BDO USA, LLP

Jacqueline Harris Chiodo, CTFA
Elder Services of Florida, Inc.

David F. Click Esq.
David F. Click, Esq.

Andrew R. Comiter J.D., LL.M.
Comiter, Singer, Baseman & Braun, LLP

Richard B. Comiter J.D., LL.M.
Comiter, Singer, Baseman & Braun, LLP

Michael Cortazzo
Flah & Company

Graham G. Davidson
PNC Wealth Management

Lori W. Denison CLU®, ChFC®, AEP®, CAP®
Life Blueprints, LLC

Marc A. DePaul
Alvarez & Marsal

Anne Desormier-Cartwright, Esq.
Elder and Estate Planning Attorneys, P.A.

Allan Dessner
The Estate Settlers, Inc.

Tasha K. Dickinson Esq.
Jones, Foster, Johnston & Stubbs, P.A.

Randell C. Doane J.D., L.L.M.
Doane & Doane P.A.

Rebecca G. Doane J.D., CPA
Doane & Doane P.A.

Rachel Doorly
Winston Art Group

Rosanne M. Duane, Esq., AEP®
Rosanne M. Duane, P.A.

Keith A. Dubauskas
Raymond James & Associates

Connie A. Eckerle CPA
Smolin Lupin & Co, LLC

Philip Engman, J.D., LL.M.
The Northern Trust Company

Joshua Escoto, J.D.
Joshua A. Escoto, PLLC

Carol Falciano
Lang Realty Mirasol Walk Plaza

Jonathan Fitzgerald
Wilmington Trust

Sandra B. Fleming
The Private Client Reserve of U.S. Bank

Douglas J. Frevert, CFP®
Raymond James Financial Services, Inc.

Amy Friedman
Senior Helpers of the Palm Beaches

David S. Fritz
Wilmington Trust, N.A.

Ellen Gallagher CFP®
South Florida Wealth Management LLC

Patricia A. Giarratano, CPA, MST
Caler, Donten, Levine, Cohen, Porter & Veil, P.A.

Jay Goetschius
Bessemer Trust

Tina Goodin, PhD, ABPP
Psychology Center of Palm Beach

Daniel A. Hanley Esq.
Gunster, Yoakley & Stewart, P.A.

David M. Harvan J.D., LL.M., CFP®
Merrill Lynch Wealth Management

Dermot T. Healey, CLU, ChFC, AEP®.CASL, CAP®

Steven Hein Esq., CPA, MBA
Hein Wealth & Tax Solutions LLC

Thornton (Brad) Henry, J.D.
The Karp Law Firm

Thornton (Tim) M. Henry, J.D., LL.M.
Jones, Foster, Johnston & Stubbs, P.A.

Christa W. Herman, Esq.
Walser Law Firm

Elliot F. Hochman, Esq.
Brookmyer, Hochman, Probst & Jonas, P.A.

Ashley S. Hodson, J.D.

David Holland J.D., CFA, CFP®
Ameriprise Financial Services, Inc.

Suzanne Holmes CFP®, CAP®
PNC Wealth Management

Steven Hulnick
Gulfshore Insurance Private Risk Services

Cynthia J. Jackson, Esq.
Scott, Harris, Bryan, Barra & Jorgensen, P.A.

Brian Jones, CFRE
American Heart Association

Kyle Michelle Jones, CFP®
Jones Lowry

R. Marshall Jones JD, CLU, ChFC, AEP®
Jones Lowry

Nancy Ann Joyce RN, CCM
Firstat RN Care Management Services

Susan Kaplan
Regal Home Health Care Management

Joseph Kawczenski
Financial Architects Partners

Carl R. Keister, Jr.
Evershore Financial Group

Michael L. Kohner CPA, CFP®, AEP®
Andersen Tax LLC

Andrew Kravit, G.G., ISA
Kravit Estate Appraisals

Chris Ladue
Visiting Nurse Association of Florida

Cara J. Lamborn CFP®
Jones Lowry

Marti LaTour
BMO Private Bank

Terrel J. "Murph" Lavergne, CPA/ABV, CVA
BCG Valuations

Syndie T. Levien, CFP®
UBS Financial Services, Inc.

Howard S. Levy, CPA, CVA
BDO USA, LLP

Sharon C. Lindsey, J.D., CAP®
The Lindsey Group

Chris Losquadro, MBA
Quantum Realty Advisors, Inc.

Anthony Lourido CFA
Key Private Bank

Randy Maale
National Planning Corporation

Domenick V. Macri, Sr., MST
Baker Avenue

Thomas L. Marcacci CFP®
Sagemark Consulting

Janelle Martyka
Maxim Healthcare Services

Rani Newman Mathura, J.D.
Cummings & Lockwood, LLC

April Matteini, G.G.
Skinner, Inc.

James McBrayer, CFP®
Hallmark Capital Management

Debra M. McCloskey, VP
Comerica Wealth Management

Veronica P. McLeod, MBA, CDFA™
Wells Fargo Advisors, LLC

Eileen B. Minnick, CTFA
BMO Private Bank

Natalie A. Moldovan-Mosqueda Esq.
Marschall & Associates

Mark D. Montgomery
Celedinas Insurance Group

Alfred G. Morici J.D. LL.M. (Tax), AEP®
Of Counsel Cohen, Norris,Wolmer, Ray, Telepman & Cohen

Mike Mullen, CPA
RSM US LLP

Stephanie L. Murray, CPA
Andersen Tax LLC

Lori B. Myers, Esq.
BDO USA, LLP

Elizabeth E. Nam, AEP®
TIAA-CREF

Andy Newitt
A-1 Moving and Storage

Holly M. O'Neill, J.D.
Broad and Cassel

Mark R. Parthemer Esq., AEP®
Bessemer Trust

John C. Patten
BMO Private Bank

Justin L. Paul
Elliot Paul & Company Auctions

Joe Pauldine
Cypress Trust Company

Robert L. (Tim) Peters
Key Private Bank

Anthony Pirozzi CFP®
Raymond James Financial Services, Inc.

DeAnna Pledger
NFP P&C Private Client Group

Ceil Schneider Randell J.D., CFP®, AEP®
Ceil Schneider Randell, P.A.

Adi Rappoport, Esq.
Gunster

John C. Rau Esq.

Ellen L. Regnery
Haile, Shaw and Pfaffenberger, P.A.

Nancy Reierson, CFRE
Palm Healthcare Foundation

Darline Richter CPA
Travani & Richter, P.A.

Jennifer Ridgely
Daszkal Bolton LLP

Peter A. Sachs J.D.
Jones Foster Johnston & Stubbs, P.A.

Scott B. Sade, CIMA®, CTFA
The Sade Group Private Wealth Management

Art Samuels
EstateBuyers.com

Michael E. Schmidt CFA
Seacoast Bank & Trust

Lisa A. Schneider Esq., AEP®
Gunster

Patty L. Schneider, CLU®, ChFC®, LUTCF, CLTC
Schneider & Associates LLC

Brenda M. Seligman CPA, MBA
Brenda M. Seligman, CPA

Andrew M. Shamp, J.D., LL.M, CAP®
Wells Fargo Private Bank

C. Carey Shook CLU, ChFC
Northwestern Mutual Financial Network

Alison Sih-Crawshaw, T.O.
Comerica Wealth Management

Adam Slavin, CPA
Berkowitz Pollack Brant Advisors and Accountants

Michael P. Stafford, Esq.
Farrell Fritz, P.C.

Erin Standish
Leslie Hindman Auctioneers

Scott P. Strochak
BNY Mellon Wealth Management

Kathleen A. Strother, CFP®, CWS
PNC Wealth Management

Matthew N. Thibault, Esq.
Ciklin Lubitz & O'Connell

Jo-Anne van de Voort
Templeton & Co.

Bradley Vialpando
Abbot Downing

Alexander Villacampa, CRPC®,CLTC
Merrill Lynch Wealth Management

Michele Vogel, J.D., LL.M.
Wilmington Trust

Stephen G. Vogelsang J.D., L.L.M.
Gunster, Yoakley & Stewart P.A.

Elizabeth C. Wagner
Cypress Trust Company

H. Thomas Wagner, Jr., CPA
RSM US LLP

Thomas Walser, Esq.
Walser Law Firm

Suzanne S. Weston. J.D.
Chilton Trust Company

Patrick M. Whitehead, Esq.
Whitehead Law Offices, P.A.

Stuart Whitehurst
Marvin & Whitehurst Appraisal Group, Inc.

Samantha Whiteman
Families First of Palm Beach County

Patrick Williams, AIF®
Williams Group

Stephen M. Zaloom, J.D., LL.M.
Zaloom Law Firm PLLC

Ramona C. Zapper
Sabadell Bank & Trust

Richard Zenker
Overbrook Management Corporation

Catherine A. Zieman, CFP®, CIMA
Neuberger Berman LLC

SPONSORS

BDO
Comerica Wealth Management
Comiter, Singer, Baseman & Braun Attorneys at Law
Jones Lowry
J.P.Morgan
Maxim Healthcare Services
Celedinas Insurance Group Established 1959
EstateBuyers.com High Bids, Impeccable Credentials 888-970-GEMS Info@EstateBuyers.com
Seacoast Wealth Management
Smolin Advisory · Tax · Accounting
Whitehead Law Offices
Andersen Tax
BCG Valuations
BMO Private Bank
Merrill Lynch
Daszkal Bolton
Firstat RN Care Management Services
Haile Shaw & Pfaffenberger Attorneys at Law
LifeBlueprints
RSM
American Cancer Society
PNC Wealth Management
Skinner