



PALM BEACH COUNTY ESTATE PLANNING COUNCIL, INC.

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

2018-2019 BOARD OF DIRECTORS

President

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

President-Elect

Andrew Shamp, J.D., LL.M.
U.S. Trust

Vice President/Membership & Sponsorship

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

Vice President/Programming

Matthew N. Thibaut, Esq.
Haselkorn & Thibaut, P.A.

Treasurer

Stephanie L. Murray, CPA
Carr, Riggs & Ingram LLC

Secretary

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

Director, Immediate Past President

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

Director

Sasha Klein, Esq., LL.M., AEP®
Proskauer Rose LLP

Director

Cara Lamborn, CFP®
Jones Lowry

Director

Chris Losquadro, MBA, CPRES
Quantum Realty Advisors, Inc.

Director

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

Director

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

MEMBERS

Laurie Albert
Divine, Blalock, Martin & Sellari, LLC

Collin Albertsson
Doyle Auctioneers & Appraisers

Jennifer Amarnick
Jupiter Medical Center Foundation

Susan P. August
BNY Mellon Wealth Management

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

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

Kathi Barnhart
BB&T Wealth

Lisa Bebout, CFP®, CTFP, ChFC®
Key Private Bank

Michael G. Becker, CFDA
SunTrust Private Wealth

David R. Bennett, Esq.
Bennett & Associates, P.A.

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
Merrill Lynch

Tad Boyes
Legend Wealth Management

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

Lawrence C Boytano
Burns Nevins Wealth Management Group of
J.P. Morgan Securities

Gregg Brant, CFP®
Burns Nevins Wealth Management Group of
J.P. Morgan Securities

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

Erik R. Brown, CLU®
Erik R. Brown Insurance

Jordan Brown
Home Care Assistance of Palm Beach County

Robert M. Burns, CFP®, ChFC®, AEP®, CLU®, CPWA®
Burns Nevins Wealth Management Group of
J.P. Morgan Securities

Alexis Cronin Butler
Bonhams

William K. Caler, Jr., CPA
Caler, Denten, Levine, Cohen, Porter & Veil, P.A.

Heather Carestia, CPA
BDO USA, LLP

Martin Cass CPA, MBA, CVA
BDO USA, LLP

Joyce Chen
BB&T Wealth

Tammy Cignoli
Bruce Gendelman Insurance Services

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

Nancy Crowder McCoy, CPA
Carr, Riggs & Ingram, LLC

Maura S. Curran, Esq.
The Curran Law Firm, P.A.

Joseph H. Deary
Nicklaus Children's Hospital Foundation

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

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

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

Rachel Doorly
Winston Art Group, Inc.

Rosanne M. Duane, Esq., AEP®
DSM Law

Keith A. Dubauskas, MBA, CMT
One + One Wealth Management of Raymond James

Diego M. Duran, CFA, CTEA
BB&T Wealth

Tanya C. Durst, J.D., LL.M.
Comiter, Singer, Baseman & Braun, LLP

Jennifer M. Eaton, J.D.
Ballentine Partners, LLC

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

Ellen Emerson, RN, MS
SeniorBridge

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

Dayle Feingold
Feingold Home Health Services

Carol Fischetti
Reverse Mortgage Funding, LLC

Nathan C. Flah, MSF
Flah & Company

Richard Flah
Flah & Company

Joshua Fleming
U.S. Bank Wealth Management

Sandra B. Fleming
U.S. Bank Wealth Management

William M.B. Fleming, Jr.
Palm Beach Atlantic University

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

Amy Friedman, MSW
Senior Helpers of the Palm Beaches

Mitch Frownfelter
Edward Jones

Ellen Gallagher CFP®
South Florida Wealth Management LLC

Irv Geffen
MorseLife Foundation

Clifford S. Gelber, CPA
Gerson, Preston, Klein, Lips, Eisenberger & Gelber, P.A.

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

Carolyn Glynn, Esq.
TD Wealth

Lawrence W. Gonnello
Alex. Brown

Glenn Graves, ChFC®
Northwestern Mutual

Karen Greene
Hired Hearts, Inc.

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

David M. Harvan, CFP®, AEP®
Merrill Lynch

Fatima Hasan, Esq.
Saul Ewing Arnstein & Lehr

Jason Haselkorn, Esq.
Haselkorn & Thibaut, P.A.

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

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

Christa W. Herman, Esq.
Walser Law Firm

April A. Hicks, CFP®
Carr, Riggs & Ingram, LLC

Barbara Higgins
NV Realty Group

Rick Hoagland, CPA/ABV/CFP, CFE, CVA
Caler, Denten, Levine, Cohen, Porter & Veil, P.A.

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

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

Colin Holloway, ChFC®
Jones Lowry

Suzanne Holmes CFP®, CAP®
TD Wealth

Marjorie A. Horwin, CPA
MBAF, LLC

Lisa L. Huertas, MBA
Lisa L. Huertas, MBA, Inc.

Michael A. Hyett, J.D., LL.M.
Fox Rothschild, LLP

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

Ronald Jacobson, CPA
Carr, Riggs & Ingram, LLC

W. Scott Johns, J.D. LL.M.
Doane & Doane, P.A.

Kyle Michelle Jones, CFP®
Jones Lowry

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

Susan Kaplan
Fuoco Group

Emily Karr
American Cancer Society, Inc.

Joseph A. Kawczynski
Financial Architects Partners

Mitchell I. Kitroser, Esq.
Kitroser & Associates

Sasha A. Klein, J.D., LL.M., AEP®
Proskauer Rose LLP

Stuart B. Klein, J.D., LL.M.
The Wagner Law Group

Michael L. Kohner CPA, CFP®, AEP®, CAP®
HBK CPAs & Consultants

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

Cara J. Lamborn CFP®
Jones Lowry

Ben Lasater
United Capital

Marti M. LaTour, MBA
The A.I.D. Group

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

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

Howard S. Levy, CPA
BDO USA, LLP

Sharon Lindsey, J.D. CAP®
Jones Lowry

Chris Losquadro, MBA, CPRES
Quantum Realty Advisors, Inc.

Anthony Lourido, CFA
Key Private Bank

Cory Lyon
Fuoco Group

Domenick V. Macri, Sr., MST
U.S. Bank Private Wealth Management

Thomas L. Marcacci CFP®
Sagemark Consulting

Michelle E. Marvel, CBA, CVA
DeLisi, Marvel & Ghee, Inc.

Rani Newman Mathura, Esq.
Newman Mathura Law PLLC

April Matteini, G.G.
Bonhams

Amy Mauer
Florida International University

James McBrayer, CFP®
J. P. Morgan Private Bank

Jennifer Jordan McCall
Pillsbury Winthrop Shaw Pittman, LLP

Debra M. McCloskey, VP
Comerica Bank

Connie McKenzie
Firstat RN Care Management Services

Gavin McNally
Primoris Wealth Advisors, LLC

Diane Peterson McNeal
Wilmington Trust

Darren J. Mills, Esq., CPA
Mills Elder Law LLC

Natalie A. Moldovan-Mosqueda, Esq.
DSM Law

Mark D. Montgomery
Celedinas Insurance Group

Richard Moravek, CLU®
Mass Mutual South Florida

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

Stephanie L. Murray, CPA
Carr, Riggs & Ingram, LLC

Gregory Myers
Opus Private Client Group

Marilyn Neckes
RBC Wealth Management

Adrienne Nelson, J.D., CFP®
SunTrust Private Wealth Management

Patrick Nickler
The Nickler Group at Morgan Stanley

Steven J. Olsen
Marsh & McLennan Agency LLC

Stephen T. Olson
Atlantic Wealth Partners, LLC

Holly M. O'Neill, Esq.
Nelson Mullins Broad and Cassel

Anthony T. Pace
Lindberg & Ripple

Mark R. Parthemer Esq., AEP®
Bessemer Trust

Joe Pauldine
Cypress Trust Company

Edith M. Pecan
MorseLife Health System

Bridget M. Perers, CDP
Kisco Senior Living/LaPosada

Kimberly Pickering, CFP®, CTEA
Wilmington Trust - Advisor Solutions Group

Thomas B. Pinckney
Bernstein Private Wealth Management

Anthony Pirozzi, CFP, AEP®
Raymond James Financial Services, Inc.

Kristine C. Polo, CPA
MKA, LLC

Julie Ann Probst
Keller Williams Realty

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

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

David Reynolds, CFP®
Spearhead Capital Advisors, LLC

Darline Richter CPA
Travani & Richter, P.A.

Jennifer Lynch Ridgely
Daszkal Bolton LLP

Caroline Rose
Jewish Federation of Palm Beach County

Jay B. Rosen
Capital Forensics, Inc.

Sarah Roy
Gurr Johns

Peter A. Sachs, Esq.
Jones Foster Johnston & Stubbs, P.A.

Art Samuels
EstateBuyers.com

Peter Sandquist
Merrill Lynch

Michael E. Schmidt CFA
Seacoast Bank & Trust

Lisa A. Schneider Esq., AEP®
Gunster

Brian T. Schubot, G.G., C.G., C.G.A., AGS
Hamilton Jewelers

Tina Segal
The Estate Settlers

Irv Seldin, J.D., MA
Visiting Angels of the Palm Beaches

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

Janet Shamblin, CTEA
Key Private Bank

Andrew M. Shamp, J.D., LL.M., CAP®
U.S. Trust

Frederick Shapiro, CFP®
Merrill Lynch

C. Carey Shook CLU, ChFC®, AEP®
Northwestern Mutual Financial Network

Alison Sih-Crawshaw
Kitroser & Associates

Douglas Simon, MD
Alex. Brown

Ira Michael Singer, CLU®, ChFC®, AEP®
Singer Financial Group

Adam Slavin, CPA
Berkowitz Pollack Brant Advisors and Accountants

Edward F. Smith, III, J.D.
MBAF

Emily A. Snider, J.D., LL.M.
Jones, Foster, Johnston & Stubbs, P.A.

Chris Snyder
Community Foundation for Palm Beach
and Martin Counties

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

Cary Stamp, CFP®, CDFA, AIF®, CAP®, AEP®
Cary Stamp & Company

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

Kelly Sturmthal, Esq.
DSM Law

Mary Elizabeth Tarter, CPA, MBA
Frankel Loughran Starr & Vallone, LLP

Robert Taylor, CFP®
Cary Stamp & Company

Matthew N. Thibaut, Esq.
Haselkorn & Thibaut, P.A.

Tommy Thompson
Fortitude Investment Group

James E. Tisdale
MBAF

Misty Trvani, CPA
Travani & Richter, P.A.

Patricia A. Travis
First Republic Bank

Steven Trend
Prudential

Tricia Trimble
Morgan Stanley

Theresa Valinotti
Professional Mortgage Consultant

Stephen G. Vogelsang J.D., LL.M.
Pressly, Pressly, Randolph & Pressly

Elizabeth C. Wagner
Cypress Trust Company

George Walks
Nursing Services of Palm Beach

Kate Waterhouse
Leslie Hindman Auctioneers

Charles T. Weiss, Esq.
Charles T. Weiss, P.A.

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

Stuart Whitehurst
Marvin & Whitehurst Appraisal Group, Inc.

Samantha Whiteman
Families First of Palm Beach County

Stephanie Williams
Edward Jones

Brian D. Wodar
Alliance Bernstein

Christina Worley, CPA/PFS, CFP®, CFA
Castle Wealth Management

Stephen M. Zaloom, J.D., LL.M., CAP®
Of Counsel Jeck, Harris, Raynor & Jones, P.A.

SPONSORS

Diamond Sponsor

ESTATEBUYERS.COM
BUYERS & SELLERS OF FINE DIAMONDS, GEMSTONES & JEWELRY
(888) 755-4367 - Info@EstateBuyers.com

**Corporate, Probate, Estate & Trust
Real Estate Specialists**
Chris and Amy Losquadro
Quantum Realty Advisors, Inc.
(561) 584-8995 | www.quantumcfs.com

Roundtable Sponsor

SUNTRUST PRIVATE WEALTH
GENSPRING SUNTRUST PRIVATE WEALTH
WILMINGTON TRUST

Platinum Sponsor

BDO | berkowitz pollack brant advisors and accountants