

GREATER

BOCA

RATON

ESTATE

PLANNING

COUNCIL

**2010 - 2011**

**Membership Directory**

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**RULES AND REGULATIONS**

1. There shall be a maximum of fifteen members of the Council from any one company or firm at any time.
2. Any member of the Board of Directors who shall miss three regular meetings of the Board of Directors during his or her annual term of office without prior explanation to the President may be removed by a majority of all members of the Board of Directors (other than the member involved).
3. A person may be a guest at Council dinner meetings a maximum of two times during any July 1 through June 30 period.
4. (a) Annual membership in the Council shall commence on July 1 and expire on the following June 30.
- (b) The annual dues shall be set by the Board of Directors from time to time. Effective September 1, 2009, membership dues are \$250 and guest dinner fees are \$65.
- (c) Members of the Council whose memberships have not expired may renew their memberships by delivering the full amount of annual dues for the upcoming year to the Vice President of Membership, on or before October 1. Such renewing members shall have their requests for renewal acted upon prior to the Board of Directors acting on applications for membership from non-member applicants.
- (d) Applications for membership from non-member applicants and applications for renewal of membership from prior-year members whose memberships have expired shall be acted upon by the Board of Directors in the order such applications are received by the Vice President of Membership.
- (e) In the event a person becomes a member of the Council after the first regular meeting of the Council held after July 1 of any year, the dues that such person shall be required to pay for the balance of his or her annual membership shall be as follows:
  - (1) If he or she becomes a member on or before December 31 of that year, 100% of the annual dues;
  - (2) If he or she becomes a member after December 31 and before March 31 of the following year, 80% of the annual dues; and
  - (3) If he or she becomes a member after March 31 of the following year, 60% of the annual dues.

5. A completed application for membership shall consist of (1) a Greater Boca Raton Estate Planning Council membership application form completed and signed by the applicant and endorsed by two “recommending members,” and (2) a check for the initial dues.
  - (a) A “recommending member” shall mean a current Council member who vouches for the applicant’s eligibility and qualifications for membership, as set forth in the Council By-laws, and who recommends the applicant for membership. One recommending member shall be from a profession of the same discipline as the applicant. Not more than one recommending member shall be in “professional association” with the applicant.
  - (b) A person in “professional association” with an applicant shall mean a person employed by the same corporation or partnership as the applicant, or a person who is a partner of a partnership of which the applicant is either an employee or a partner.
  - (c) A recommending member shall endorse an application for membership either (1) by signing the application form in the space provided for endorsement, or (2) by a separate letter of recommendation. If a separate letter of recommendation is used, it shall be submitted with the application, and the failure to do so shall render the application incomplete.
6. The Vice President of Membership shall submit only completed applications to the Board of Directors for approval and shall return incomplete applications to the applicant.
7. The Vice President of Membership shall deliver an applicant’s check for the initial dues to the Treasurer for deposit. If the Board does not approve the applicant for membership, the Treasurer shall refund the full amount of such dues to the applicant.
8. If a member is unable to attend a meeting, the member may not send someone else in his or her place, unless a guest fee is paid. The amount of a guest fee shall be set by the Board of Directors from time to time.
9. The maximum number of members of the Council shall be 200.

**PAST PRESIDENTS**

- Elyssa Kupferberg**  
2009-2010
- Mark W. Glickman**  
2008-2009
- Sharon DaBrusco**  
2007-2008
- Nancy H. Weingard**  
2006-2007
- Stuart Rader**  
2005-2006
- Seth Marmor**  
2004-2005
- David Lowe**  
2003-2004
- Jeffrey Schildkraut**  
2002-2003
- Ira M. Herschbein**  
2001-2002
- Elizabeth D. Fletcher**  
2000-2001
- George Weinstein**  
1999 – 2000
- Mary Sue Donohue**  
1998 – 1999
- Herbert J. Stangl**  
1997 – 1998
- Barbara A. Sloan**  
1996 – 1997
- Michael W. Hill**  
1995 – 1996
- Gary L. Stark**  
1994 – 1995
- Paul R. Roman**  
1993 – 1994
- David Halaburda**  
1992 – 1993
- Francis J. Brennan**  
1991 – 1992
- Thomas Workman, Jr.**  
1990 – 1991
- Laurance J. Boyden, Jr.**  
1989 – 1990
- Donald C. Sider**  
1988 – 1989
- Richard W. Johnson**  
1987 – 1988
- Richard DuPuis**  
1986 – 1987
- Craig Donoff**  
1984 – 1986

2010 — 2011 OFFICERS AND DIRECTORS

**Debra A. Cancilla**  
*President*

**James A. Ballerano, Jr.**  
*President-Elect*

**William C. Miller**  
*Vice President – Programs*

**Kristen Lynch**  
*Vice President – Membership*

**Lanny K. Marks**  
*Vice President – Technology*

**Alan B. Rosenthal**  
*Secretary*

**Ira M. Herschbein**  
*Treasurer*

**Debbie Hammer**  
*Director*

**Daniel Dixon**  
*Director*

**Seth Marmor**  
*Director*

**Don Londeree**  
*Director & Speakers Bureau Chair*

**Paul Roman**  
*Director*

**Marjorie Horwin**  
*Director*

**Elyssa J. Kupferberg**  
*Immediate Past President*

**Sharon DaBrusco**  
*Director Emeritus*

**Craig Donoff**  
*Director Emeritus*

**George Weinstein**  
*Director Emeritus*

**Nancy H. Weingard**  
*National Liaison*

MEMBERS

Leonard J. Adler  
Attorney  
Bessemer Trust  
222 Royal Palm Way  
Palm Beach, FL 33480  
561-835-8318  
561-209-5551  
adler@bessemer.com

James A. Ballerano Jr.  
Attorney  
Chapin Ballerano & Cheslack  
399 W. Palmetto Road  
Suite #202  
Boca Raton, FL 33432  
561-272-1225  
561-272-4442  
jballerano@chapin-law.com

M. Adam Bankier  
Attorney  
M. Adam Bankier, P.A.  
101 SE 6th Avenue, Suite C  
Delray Beach, FL 33483  
561-278-3110  
561.278.3143  
abankier@bankierlaw.com

Jeffrey A. Baskies  
Attorney  
Katz Baskies LLC  
2255 Glades Road, Suite # 240W  
Boca Raton, FL 33431  
561-910-5700  
561-910-5701  
jeff.baskies@katzbaskies.com

Laurence Blair  
Attorney  
Greenspoon Marder, P.A.  
2255 Glades Road, Suite # 414E  
Boca Raton, FL 33431  
561-994-2212  
561-322-2965  
laurence.blair@gmlaw.com

Stuart E. Bloch  
Attorney  
Stuart E. Bloch PA  
980 N. Federal Highway, #302  
Boca Raton, FL 33432  
561-338-7299  
562-368-2292  
stuart@seblochlaw.com

Gregory S. Bloshinsky  
Attorney  
Morris Law Group  
7000 W. Palmetto Park Rd., Suite # 205  
Boca Raton, FL 33433  
561-750-3850  
561-750-4069  
gbloshinsky@law-morris.com

Elaine M. Bucher  
Attorney  
Proskauer Rose LLP  
2255 Glades Road, Suite # 421A  
Boca Raton, FL 33431  
561-241-7400  
561-241-7145  
ebucher@proskauer.com

Danielle Cameron  
Planned Giving Professional  
Community Foundation for Palm Beach and Martin Counties  
700 S. Dixie Highway, Suite # 200  
West Palm Beach, FL 33401  
561-659-6800  
561-832-6542  
dcameron@cfpbmc.org

Debra A. Cancilla  
Trust Officer  
Wells Fargo, The Private Bank  
5355 Town Center  
Suite 1004  
Boca Raton, FL 33486  
561-362-1006  
561-362-1025  
debra.a.cancilla@wellsfargo.com

Arthur J. Canter  
Financial Planner/Life Underwriter/Financial Consultant  
Investment Advisory Professionals, LLC  
400 S Dixie Hwy, Ste 322  
Boca Raton, FL 33432  
561-391-4477  
561-391-8232  
art@iapllc.com

Michael S. Carris  
Trust Officer  
Regions Morgan KeeganTrust/Regions Bank  
Boca Center - Tower II  
5100 Town Center Circle, #350  
Boca Raton, FL 33486  
954-769-5830  
954-769-5835  
michael.carris@regions.com

Caryn J. Clayman  
Attorney  
Posess & Walser, P.A.  
7015 Beracasa Way, Suite # 201  
Boca Raton, FL 33433  
561-750-1040  
561-750-0708  
cclayman@walserlaw.com

John W. Clidas  
Trust Officer  
Wells Fargo, The Private Bank  
350 East Las Olas Blvd., 19<sup>th</sup> Floor  
954-765-3862  
954-765-3956  
john.clidas@wellsfargo.com

Mary Connors  
Trust Officer  
Merrill Lynch Trust Co.  
5200 Town Center Circle, Suite #500  
Boca Raton, FL 33486  
561-347-5662  
561-283-0487  
mary\_connors@ml.com

Sharon DaBrusco  
Trust Officer  
U.S. Trust, Bank of America, Private Wealth Management  
280 E. Palmetto Park Road, Suite # 200  
Boca Raton, FL 33432  
561-447-8033  
561-338-6439  
sharon.dabrusco@ustrust.com

Mary F. Dean  
Planned Giving Professional  
Florida Atlantic University-Retired  
3593 Commodore Circle  
Delray Beach, FL 33483  
561-272-2587  
561-272-2587  
mfdean@bellsouth.net

Daniel Dixon  
Financial Planner/Life Underwriter/Financial Consultant  
Kaplan, Krauss, & Levine, LLC  
6111 Broken Sound Parkway NW, Suite # 340  
Boca Raton, FL 33487  
561-981-5400  
561-981-5204  
ddixon@kklfwa.com

Craig Donoff  
Attorney  
Craig Donoff, P.A.  
6100 Glades Road, Suite # 310  
Boca Raton, FL 33434  
561-451-8220  
561-451-8223  
information@craigdonoffpa.com

Mary Sue Donohue  
Attorney  
Buckingham Doolittle & Burroughs, LLP  
5355 Town Center Road, Suite # 900  
Boca Raton, FL 33486  
561-241-0414  
561-241-9766  
msdonohue@bdblaw.com

Brian K. Duffey  
Attorney  
The Duffey Law Firm  
350 Camino Gardens Blvd., #303  
Boca Raton, FL 33432  
561-862-4176  
561-862-4983  
bkd@theduffeylawfirm.com

Roberta Dunn Bartley  
Attorney  
Roberta Dunn Bartley, P.A.  
2385 NW Executive Center Dr, Ste 100  
Boca Raton, FL 33431  
561-362-0800  
rdbartleylaw@bellsouth.net

Elizabeth A. Dunn  
CPA  
Elizabeth A. Dunn, CPA, P.A.  
1001 Yamato Road, Suite # 100  
Boca Raton, FL 33431  
561-391-1120  
561-241-1150  
edunn@taxsolutionsgroup.biz

John K. Eastham  
Attorney  
Eastham Law Offices  
138 W. Palmetto Park Road  
Boca Raton, FL 33432  
561-395-6800  
561-391-6902  
easthamlaw@gmail.com

Seth E. Ellis  
Attorney  
Ellis & Goldberg, P.L.  
4755 Technology Way, #205  
Boca Raton, FL 33431  
561-910-7500  
561-910-7501  
seth@egpl-law.com

Pamela A. Fau  
Trust Officer  
SunTrust Bank  
800 S. Federal Hwy., Second Floor  
Boca Raton, FL 33432  
561-362-3555  
561-391-4205  
pam.fau@suntrust.com

Alyssa Feder  
Trust Officer  
JPMorgan Private Bank  
205 Royal Palm Way  
Palm Beach, FL 33480  
561-838-4634  
561-833-3810  
alyssa.r.feder@jpmorgan.com

Michele Ferrara  
CPA  
Morrison, Brown, Argiz & Farra, LLP  
225 NE Mizner Blvd., Suite # 685  
Boca Raton, FL 33432  
561-909-2100  
561-392-3265  
michele.ferrara@mbafcpa.com

Daniel T. Fleischer  
Attorney  
Craig Donoff P.A.  
6100 Glades Road, #301  
Boca Raton, FL 33434  
305-984-7545  
561-935-9542  
dtf@craigdonoffpa.com

Norman Fleisher  
Attorney  
Gutter Chaves Josepher Rubin Forman Fleisher P.A.  
2101 Corporate Blvd, #107  
Boca Raton, FL  
561-998-7847  
561-998-2642  
nfleisher@floridatatax.com

Peter J. Forman  
Attorney  
Gutter Chaves Josepher Rubin Forman Fleisher P.A.  
2101 Corporate Blvd., Suite # 107  
Boca Raton, FL 33431  
561-998-7847  
561-998-2642  
pforman@floridatatax.com

Irv Geffen  
Planned Giving Professional  
Jewish Federation of South Palm Beach County  
9901 Donna Klein Blvd.  
Boca Raton, FL 33428  
561-852-3127  
561-852-3221  
irvg@bocafed.org

Clifford Gelber  
CPA  
Steiner & Gelber PA  
2201 NW 30th Place  
Pompano Beach, FL 33069  
954-969-8786  
954-969-8782  
cliff@steiner-gelber.com

Myles German  
Financial Planner/Life Underwriter/Financial Consultant  
AXA Advisors, LLC  
2255 Glades Road, #412E  
Boca Raton, FL 33431  
561-961-9311  
954-337-7775  
myles.german@axa-advisors.com

Michael V. Gisonda  
Financial Planner/Life Underwriter/Financial Consultant  
The Bridge Group  
100 W. Cypress Creek Road, #960  
Fort Lauderdale, FL 33309  
954-958-4220  
954-958-4307  
michael@thebridgegroup.com

Mark W. Glickman  
Planned Giving Professional  
US Holocaust Memorial Museum  
2200 NW Corporate Blvd., #305  
Boca Raton, FL 33431  
561-995-6773  
561-995-6778  
mglickman@ushmm.org

Scott E. Goldberger  
Attorney  
Proskauer Rose LLP  
2255 Glades Road, #340W  
Boca Raton, FL 33431  
561-995-4782  
561-241-7145  
sgoldberger@proskauer.com

Albert W. Gortz  
Attorney  
Proskauer Rose LLP  
2255 Glades Road, Suite # 421A  
Boca Raton, FL 33431  
561-241-7400  
561-241-7145  
agortz@proskauer.com

Paul S. Gravenhorst  
Attorney  
Holland & Knight, LLP  
515 East Las Olas Blvd., #1200  
Fort Lauderdale, FL 33301  
954-468-7925  
954-463-2030  
paul.gravenhorst@hkclaw.com

Sherri Greenblatt  
Attorney  
Florida Elder Law Concepts, PA  
7777 West Glades Road, #100  
Boca Raton, FL 33434  
561-245-4620  
561-245-4742  
sherri@flelderlawconcepts.com

Eamonn W. Gunther  
Trust Officer  
U.S. Trust, Bank of America Private Wealth Management  
280 East Palmetto Park Road  
Suite 308E  
Boca Raton, FL 33432  
561-338-3510  
561-338-6439  
eamonn.w.gunther@ustrust.com

Debbie Hammer  
Planned Giving Professional  
Anti-Defamation League  
One Park Place, 621 NW 53rd St., Suite # 450  
Boca Raton, FL 33487  
561-988-2928  
561-989-0712  
dhammer@adl.org

Roderick P. Hansen  
Financial Planner/Life Underwriter/Financial Consultant  
Pacific Life  
2385 Executive Center Dr., Suite # 260  
Boca Raton, FL 33431  
561-912-1300  
561-912-0026  
roderick.hansen@pacificlife.com

Ronald E. Harbison  
CPA  
Morrison, Brown, Argiz & Farra  
225 NE Mizner Blvd., #685  
Boca Raton, FL 33432  
561-909-2100  
561-392-3265  
rharbison@mbafcpa.com

James A. Herb  
Attorney  
Herb Law Firm, Chartered  
2200 Corporate Blvd., NW, Suite # 315  
Boca Raton, FL 33431  
561-982-9930  
561-982-9934  
jahprobate@aol.com

Ira M. Herschbein  
CPA  
Ira M. Herschbein, CPA, P.A.  
7777 Glades Road, Suite # 209  
Boca Raton, FL 33434  
561-479-0915  
561-479-0930  
ira@imhcpa.com

Diana L. Hileman  
Attorney  
Rutherford Mulhall, P.A.  
2600 N Military Trail, 4th Fl  
Boca Raton, FL 33431  
561-241-1600  
561-241-3815  
dhileman@rmlawyer.com

Marjorie A. Horwin  
CPA  
Morrison, Brown, Argiz & Farra, LLP  
225 NE Mizner Blvd., Suite # 685  
Boca Raton, FL 33432  
561-909-2100  
561-392-3265  
marjorie.horwin@mbafcpa.com

Randolph H. James  
CPA  
James & Surman, CPA's  
8000 North Federal Highway, Suite 120  
Boca Raton, FL 33487  
561-338-0028  
561-338-7861  
randy@jamesandsurman.com

Erik Edward Joh  
Attorney  
Hinman, Howard & Kattell, LLP  
4600 N. Ocean Blvd., Suite # 206  
Boynton Beach, FL 33435  
561-276-1008  
561-272-2793  
ejoh@hhk.com

Thomas E. Joyce  
Trust Officer  
Wachovia Trust/Wells Fargo Inc.  
350 East Las Olas Blvd., #1900  
Fort Lauderdale, FL 33301  
954-765-3985  
954-765-3956  
thomas.e.joyce@wellsfargo.com

George D. Karibjanian  
Attorney  
Proskaur Rose LLP  
2255 Glades Road, Suite # 421A  
Boca Raton, FL 33431  
561-995-4780  
561-241-7145  
gkaribjanian@proskauer.com

Jeffrey S. Kahn  
Attorney  
Greenberg Traurig  
5100 Town Center Circle, Suite # 400  
Boca Raton, FL 33486  
561-955-7635  
561-367-6235  
kahnj@gtlaw.com

Mark Kasper  
Planned Giving Professional  
Community Foundation of Broward  
1401 East Broward Blvd., #100  
Ft. Lauderdale, FL 33301  
954-761-9503  
954-761-7102  
mkasper@cfbroward.org

Thomas O. Katz  
Attorney  
Katz Baskies LLC  
2255 Glades Rd, Ste 240W  
Boca Raton, FL 33431  
561-910-5700  
561-910-5701  
thomas.katz@katzbaskies.com

Vicki S. Katz  
Planned Giving Professional  
Anti-Defamation League  
One Park Place, 621 NW 53rd St., Suite # 450  
Boca Raton, FL 33487  
561-988-2935  
561-989-0712  
vkatz@adl.org

David A. Katzman  
CPA  
CBIZ Goldstein Lewin & Co.  
1675 North Military Trail, Fifth Floor  
Boca Raton, FL 33486  
561-994-5050  
561-241-0071  
dkatzman@cbizgl.com

Shaun Kelley-Perrone  
Trust Officer  
US Trust/Bank of America  
150 E. Palmetto Park Rd., Second Floor  
Boca Raton, FL 33432  
561-393-5187  
561-393-5441  
shaun.kelley-perrone@ustrust.com

Donald G. Kissane  
Trust Officer  
PO Box 771423  
Coral Springs, FL 33077  
954-812-6960  
954-796-8751  
dkissane1154@aol.com

Elyssa Kupferberg  
Trust Officer  
BNY Mellon Wealth Management  
1801 N. Military Trail, Suite # 100B  
Boca Raton, FL 33431  
561-620-2222  
561-620-2230  
elyssa.kupferberg@bnymellon.com

Michael H. Leeds  
Attorney  
Blank Rome LLP  
1200 N. Federal Hwy., Suite # 312  
Boca Raton, FL 33432  
561-417-8100  
561-417-8101  
leeds@blankrome.com

Corey E. Levine  
CPA  
Marcus & Levine, CPAs, LLC  
15300 Jog Road, Suite # 208  
Delray Beach, FL 33446  
561-455-0360  
561-455-0366  
corey@marcusandlevine.com

Judy J. Lewis  
CPA  
CBIZ Goldstein Lewin  
1675 N. Military Trail, 5th Floor  
Boca Raton, FL 33486  
561-994-5050  
561-241-0071  
jjlewis@cbizgl.com



Marc H. List  
CPA  
CBIZ Goldstein Lewin  
1675 N. Military Trail, 5th Floor  
Boca Raton, FL 33486  
561-994-5050  
561-241-0071  
mlist@cbizgl.com

Donn Londeree  
Trust Officer  
Sabadell United Bank  
1801 N. Military Trail  
Boca Raton, FL 33431  
561-750-0075  
561-750-8226  
donn.londeree@sabadellunited.com

Jodi R. Lustgarten  
Attorney  
Jodi R. Lustgarten, P.A.  
2101 Corporate Blvd., Suite # 107  
Boca Raton, FL 33431  
561-210-0243  
561-910-5754  
jlustgarten@lustgartenlaw.com

Kristen M. Lynch  
Attorney  
Ruden McClosky  
200 E. Broward Blvd.  
Suite 1500  
Ft. Lauderdale, FL 33301  
954-527-2488  
954-333-4088  
kristen.lynch@ruden.com

Irving S. Marcus  
CPA  
Marcus & Levine, CPAs, LLC  
15300 Jog Road, Suite # 208  
Delray Beach, FL 33446  
561-455-0360  
561-455-0366  
irving@marcusandlevine.com

Lanny K. Marks  
Financial Planner/Life Underwriter/Financial Consultant  
Marks and Associates  
1489 W. Palmetto Park Road, Suite # 445  
Boca Raton, FL 33486  
561-750-0312  
561-347-9779  
lanny-office@att.net

Seth A. Marmor  
Attorney  
Shapiro Blasi Wasserman & Gora, P.A.  
7777 Glades Road, Suite # 400E  
Boca Raton, FL 33434  
561-477-7800  
561-477-7722  
samarmor@sbwlawfirm.com

Leslie A. McCullough  
Trust Officer  
Northern Trust  
3100 N. Military Trail  
Boca Raton, FL 33431  
561-912-4056  
561-995-1978  
lam14@ntrs.com

Linda A. Melcer  
Trust Officer  
Oppenheimer & Co. Inc.  
4855 Technology Way  
#400  
Boca Raton, FL 33431  
561-416-8620  
561-416-8671  
linda.melcer@opco.com

William C. Miller  
Financial Planner/Life Underwriter/Financial Consultant  
William C. Miller & Associates  
235 S.E. 5th Avenue  
Delray Beach, FL 33483  
561-276-8710  
561-276-9780  
bill@wcmllifeplan.com

Daniel Montilla  
Trust Officer  
Merrill Lynch Trust Co., A Division of Bank of America, N.A.  
5200 Town Center Circle, #500  
Boca Raton, FL 33486  
561-347-5672  
561-223-357  
daniel\_montilla@ml.com

Steven H. Moorin  
Financial Planner/Life Underwriter/Financial Consultant  
Crump Insurance Services  
PO Box 643567  
Vero Beach, FL 32964  
954-298-6151  
561-929-9900  
shmoorin@gmail.com

Jo-Ann Murphy  
Trust Officer  
Wells Fargo Bank, N.A.  
Wells Fargo, The Private Bank  
350 East Las Olas Blvd., 19<sup>th</sup> Floor  
Fort Lauderdale, FL 33301  
954-765-3834  
954-765-3956  
joann.murphy@wellsfargo.com

Terri Murru  
Planned Giving Professional  
Murru & Associates  
5550 NE 29th Avenue  
Boca Raton, FL 33308  
954-854-3255  
954-491-2831  
terri@murru.org

Alice B. Newman  
Attorney  
Law Offices of Alice B. Newman  
2255 Glades Road, Suite # 324 Atrium  
Boca Raton, FL 33431  
561-482-0680  
561-482-0171  
alice@alicenewman.com

Richard K. Newman  
CPA  
Newman & Cohen Financial Management, Inc.  
1108 East Newport Center Drive  
Deerfield Beach, FL 33442  
561-988-8890  
561-994-6277  
debra.altschul@newman-cohen.com

Jeanne F. Nolan  
Trust Officer  
Merrill Lynch Trust Co.  
5200 Town Center Circle, Suite # 500  
Boca Raton, FL 33486  
561-347-5667  
561-347-5696  
jeanne\_nolan@ml.com

Mark L. Nowak  
Attorney  
Rutherford Mulhall, P.A.  
2600 N.Military Trail, Fourth Floor  
Boca Raton, FL 33431  
561-241-1600  
561-241-3815  
mnowak@rmlawyer.com

Holly M. O'Neill  
Attorney  
Miller & O'Neill, P.L.  
2300 Glades Road, Suite # 400E  
Boca Raton, FL 33431  
561-353-3880  
561-353-0643  
honeill@mandolaw.com

R. Brady Osborne Jr.  
Attorney  
Osborne & Osborne, P.A.  
798 S. Federal Highway, Suite # 100  
Boca Raton, FL 33432  
561-395-1000  
561-368-6930  
rbo@osbornepa.com

Dominick V. Paonessa  
Financial Planner/Life Underwriter/Financial Consultant  
Raymond James & Assoc.  
2255 Glades Road, Suite # 120A  
Boca Raton, FL 33431  
561-9979100  
866-206-2609  
dominick.paonessa@raymondjames.com

David Pratt  
Attorney  
Proskauer Rose LLP  
2255 Glades Road, Suite # 340W  
Boca Raton, FL 33431  
561-241-7400  
561-241-7145  
dpratt@proskauer.com

Ryan S. Ratner  
Attorney  
Akerman Senterfitt  
2424 N. Federal Highway, Suite # 410  
Boca Raton, FL 33432  
561-862-4000  
561-260-9637  
ratner@butzel.com

Arthur R. Redgrave  
Attorney  
Redgrave & Rosenthal LLP  
120 E.Palmetto Park Rd., Suite # 400  
Boca Raton, FL 33432  
561-347-1700  
561-391-9944  
aredgrave@boca-law.com

David A. Riggs  
Attorney  
Rutherford Mulhall, PA  
2600 N. Military Trail, Fourth Fl.  
Boca Raton, FL 33431  
561-912-0165  
561-241-3815  
driggs@rmlawyer.com

Paul E. Roman  
Attorney  
Hankins Northwood Roman Wenzel P.L.  
1800 N.Military Trail, Suite # 160  
Boca Raton, FL 33431  
561-862-4139  
561-862-4966  
proman@hnrwlaw.com

Carolyn Rose  
Planned Giving Professional  
Jewish Federation of South Palm Beach County  
9901 Donna Klein Blvd.  
Boca Raton, FL 33428  
561-852-3142  
561-852-3221  
carolynr@bocafed.org

Alan B. Rosenthal  
Attorney  
Redgrave & Rosenthal LLP  
120 E.Palmetto Park Road, Suite # 400  
Boca Raton, FL 33432  
561-347-1700  
561-391-9944  
arosenal@redgraveandrosenthal.com

Bob Rubin  
Financial Planner/Life Underwriter/Financial Consultant  
Rubin Herrington  
1200 N.Federal Highway, #200  
Boca Raton, FL 33432  
561-210-8516  
561-210-8542  
bob.rubin@rubinherrington.com

Charles (Chuck) Rubin  
Attorney  
Gutter Chaves Josepher Rubin Forman Fleisher P.A.  
2101 Corporate Blvd., #107  
Boca Raton, FL 33431  
561-998-7847  
561-892-0221  
crubin@floridatax.com

Charles E. Rutherford  
Attorney  
Rutherford Mulhall, P.A.  
2600 N. Military Trail, Fourth Floor  
Boca Raton, FL 33431  
561-241-1600  
561-241-3815  
crutherford@rmlawyer.com

David A. Rutherford  
Planned Giving Professional  
Florida Atlantic University  
777 Glades Road, Adm 383  
Boca Raton, FL 33427  
561-297-2119  
561-297-2890  
druthe7@fau.edu

Mark A. Sachs  
Financial Planner/Life Underwriter/Financial Consultant  
Gibraltar Private Bank & Trust  
450 E. Las Olas Blvd., #180  
Ft. Lauderdale, FL 33301  
954-768-5348  
954-768-2446  
msachs@gibraltarprivate.com

Justin Savioli  
Attorney  
Katz Baskies LLC  
2255 Glades Road, #240W  
Boca Raton, FL 33431  
561-910-5700 X-306  
561-910-5701  
justin.savioli@katzbaskies.com

Mark A. Schaum  
Attorney  
Winter & Schaum, P.A.  
2300 Corporate Blvd., NW, Suite # 137  
Boca Raton, FL 33431  
561-994-0100  
561-241-1493  
mschaum@winterandschaum.com

Jeffrey Schildkraut  
Financial Planner/Life Underwriter/Financial Consultant  
National Planning Corporation  
7700 Camino Reale, Suite #100  
Boca Raton, FL 33433  
561-368-3630  
561-368-3641  
jeffrey\_schildkraut@npcfinancial.com

Sidney M. Schuchman  
CPA  
Sidney M. Schuchman, CPA, LLC  
20283 State Road 7, Suite # 300  
Boca Raton, FL 33498  
561-544-1010  
561-544-1099  
sidney@cpaboca.com

Richard H. Schuller  
Financial Planner/Life Underwriter/Financial Consultant  
1801 North Military Trail  
Boca Raton, FL 33431  
561-620-2225  
561-620-2237  
richard.schuller@bnymellon.com

Constance R. Scott  
CPA  
4881 Glenn Pine Lane  
Boynton Beach, FL 33436  
561-638-5306  
561-638-1963  
crscpa@aol.com

Mark Scott  
Attorney  
Kaufman, Rossin & Co.  
2699 S.Bayshore Drive  
Miami, FL 33133  
305-857-6768  
786-470-2268  
mscott@kaufmanrossin.com

Thomas V. Siciliano  
Attorney  
Thomas V. Siciliano, P.A.  
980 N.Federal Highway, Suite # 440  
Boca Raton, FL 33432  
561-368-6500  
561-338-3441  
tvs@tvslaw.com

Donald C. Sider  
Attorney  
Donald C. Sider & Associates, P.A.  
6751 N. Federal Highway, Suite # 200  
Boca Raton, FL 33487  
561-391-1100  
561-391-2801  
dsider@siderlaw.com

Ronald L. Siegel  
Attorney  
Ronald L. Siegel, P.A.  
1800 Corporate Blvd., NW, Suite # 302  
Boca Raton, FL 33431  
561-241-3113  
561-241-3226  
rls@rsiegellaw.com

Michael Silver  
Financial Planner/Life Underwriter/Financial Consultant  
Baron, Silver, Stevens Financial Advisors, LLC  
4800 N. Federal Highway, Suite # 210A  
Boca Raton, FL 33431  
561-447-1997  
561-447-6670  
msilver@bssf.com

E. Brian Singer  
Financial Planner/Life Underwriter/Financial Consultant  
EBS Responsible Wealth  
2385 Executive Center Drive, #100  
Boca Raton, FL 33431  
561-998-3180  
561-998-0165  
infonews@ebsresponsiblewealth.com

Thomas E. Sliney  
Attorney  
Buckingham, Doolittle & Burroughs, LLP  
5355 Town Center Road, #900  
Boca Raton, FL 33486  
561-241-0414  
561-241-9766  
tsliney@bdbl.com

Barbara A. Sloan  
Attorney  
Dickenson, Murphy, Rex and Sloan  
980 N. Federal Highway, Suite # 410  
Boca Raton, FL 33432  
561-391-1900  
561-391-1933  
bsloan@dmrslaw.com

Kristina J. Sommerkamp  
Financial Planner/Life Underwriter/Financial Consultant  
Sommerkamp Ins. & Financial Svcs  
2000 N. Dixie Hwy, Suite # 202  
Boca Raton, FL 33431  
561-750-3138  
561-750-8975  
krissom@aol.com

Robert L. Spallina  
Attorney  
Tescher & Spallina, P.A.  
4855 Technology Way, #720  
Boca Raton, FL 33431  
561-997-7008  
561-997-7308  
rspallina@tescherspallina.com

Ronald Stearn  
Planned Giving Professional  
10958 Mainsail Drive  
Copper City, FL 33026  
954-431-8576  
ronstearn1@comcast.net

Mindy Stein  
Attorney  
Mindy Stein P.A.  
2300 Glades Road, #203E  
Boca Raton, FL 33431  
561-447-7644  
561-361-9865  
mstein@mindystein.com

Jeffrey S. Steiner  
Attorney  
Jeffrey S. Steiner, P.A.  
2500 Quantum Lakes Drive, #203  
Boynton Beach, FL 33426  
561-853-2123  
561-999-0410  
steinerlaw@comcast.net

William J. Surman Jr.  
CPA  
James & Surman, C.P.A.  
8000 North Federal Highway, Suite 120  
Boca Raton, FL 33487  
561-338-0028  
561-338-7861  
jack@jamesandsurman.com

Mace Barry Tamse  
Financial Planner/Life Underwriter/Financial Consultant  
Morgan Stanley  
490 E. Palmetto Park Rd.  
Boca Raton, FL 33432  
561-394-8612  
561-394-8660  
mace.b.tamse@morganstanley.com

Donald R. Tescher  
Attorney  
Tescher & Spallina, P.A.  
4855 Technology Way, #720  
Boca Raton, FL 33431  
561-997-7008  
dtescher@tescherspallina.com

Jon W. Ulin  
Financial Planner/Life Underwriter/Financial Consultant  
Ulin Financial Group  
1200 N. Federal Highway  
Suite 200  
Boca Raton, FL 33432  
561-210-7887  
561-819-9841  
jon.uln@lpl.com

Mark Walters  
Trust Officer  
Merrill Lynch Trust Co.  
5200 Town Center Circle, #500  
Boca Raton, FL 33486  
561-347-5672  
561-922-3620  
mark.e.walters@mkl.com

Nancy H. Weingard  
Financial Planner/Life Underwriter/Financial Consultant  
Raymond James and Associates  
2255 Glades Road, Suite # 120A  
Boca Raton, FL 33431  
561-997-9100  
866-206-2609  
nancy.weingard@RaymondJames.com

Fred Weinstein  
CPA  
Goldstein, Zugman, Weinstein & Poole, LLC  
401 Camino Gardens Blvd.  
Boca Raton, FL 33432  
561-368-9272  
561-392-1521  
fweinstein@gzwpcpa.com

George Weinstein  
Attorney  
Christopher Gagic, PA  
1200 N. Federal Highway, #200  
Boca Raton, FL 33432  
561-210-8538  
561-210-8301  
gweinstein@gagiclaw.com

Bruce Winter  
Attorney  
Winter & Schaum, P.A.  
2300 Corporate Blvd.,NW, Suite # 137  
Boca Raton, FL 33431  
561-994-0100  
561-241-1493  
brucewinter@winterandschaum.com

Jerome L. Wolf  
Attorney  
Duane Morris LLP  
2700 N. Military Trail, #300  
Boca Raton, FL 33431  
561-962-2100  
561-516-6317  
jlwolf@duanemorris.com

Kathleen M. Wolf  
Trust Officer  
Cypress Trust Company  
595 S.Federal Hwy., Suite # 110  
Boca Raton, FL 33432  
561-910-0710  
561-549-0307  
kathleen.wolf@cypresscapitalgroup.com

Robert M. Wolf  
Attorney  
Mann and Wolf, LLP  
55 NE 5th Ave., Suite # 500  
Boca Raton, FL 33432  
561-338-5060  
561-395-4701  
rwolf@mannwolf.com

Adam M. Workman  
Trust Officer  
Wells Fargo, The A Private Bank  
5355 Town Center  
Suite 1004  
Boca Raton, FL 33486  
561-362-1055  
561-362-1025  
adam.workman@wellsfargo.com

Thomas Workman Jr.  
CPA  
Thomas Workman & Associates  
PO Box 81-1117  
Boca Raton, FL 33481  
561-393-8220  
561-393-8279  
tom@workmancpa.com

Catherine A. Ziemann  
Trust Officer  
Northern Trust Bank of Florida, N.A.  
3100 N.Military Trail  
Boca Raton, FL 33431  
561-912-4038  
561-994-8615  
chz1@ntrs.com



## Certified Public Accountants

Salvatore Bochicchio  
Elizabeth A. Dunn  
Michele Ferrara  
Clifford Gelber  
Ronald E. Harbison  
Ira M. Herschbein  
Marjorie A. Horwin  
Randolph H. James  
David A. Katzman  
Corey E. Levine  
Judy J. Lewis  
Marc H. List  
Irving S. Marcus  
Richard K. Newman  
Sidney M. Schuchman  
Constance R. Scott  
William J. Surman, Jr.  
Fred Weinstein  
Thomas Workman, Jr.

## ATTORNEYS

Leonard J. Adler  
James A. Ballerano, Jr.  
M. Adam Bankier  
Jeffrey A. Baskies  
Laurence Blair  
Stuart E. Bloch  
Gregory S. Bloshinsky  
Elaine M. Bucher  
Caryn J. Clayman  
Craig Donoff  
Mary Sue Donohue  
Brian K. Duffey  
Roberta Dunn Bartley  
John K. Eastham  
Seth E. Ellis  
Daniel T. Fleischer  
Norman Fleisher  
Peter J. Forman  
Scott E. Goldberger  
Albert W. Gortz  
Paul S. Gravenhorst  
Sherri Greenblatt  
James A. Herb  
Diana L. Hileman  
Erik Edward Joh  
Jeffrey S. Kahn  
George D. Karibjanian  
Thomas O. Katz  
Michael H. Leeds  
Jodi R. Lustgarten  
Kristen M. Lynch  
Seth A. Marmor  
Alice B. Newman  
Mark L. Nowak  
Holly M. O'Neill  
R. Brady Osborne  
David Pratt  
Ryan S. Ratner  
Arthur R. Redgrave  
David A. Riggs  
Paul E. Roman  
Alan B. Rosenthal  
Charles (Chuck) Rubin  
Charles E. Rutherford  
Justin Savioli  
Mark A. Schaum  
Mark Scott  
Thomas V. Siciliano  
Donald C. Sider  
Ronald L. Siegel  
Thomas E. Sliney  
Barbara A. Sloan  
Edward F. Smith III  
Robert L. Spallina  
Mindy Stein  
Jeffrey S. Steiner  
Donald R. Tescher  
George Weinstein  
Bruce Winter  
Jerome L. Wolf  
Robert M. Wolf

**FINANCIAL PLANNERS  
LIFE UNDERWRITERS  
FINANCIAL CONSULTANTS**

Arthur J. Canter  
Daniel Dixon  
Myles German  
Michael V. Gisonda  
Roderick P. Hansen  
Lanny K. Marks  
William C. Miller  
Steven H. Moorin  
Dominick V. Paonessa  
Bob Rubin  
Mark A. Sachs  
Jeffrey Schildkraut  
Richard H. Schuller  
Michael Silver  
E. Brian Singer  
Kristina J. Sommerkamp  
Mace Barry Tamse  
Jon W. Ulin  
Nancy H. Weingard

**TRUST OFFICERS**

Debra Cancilla  
Michael Carris  
John Clidas  
Mary Connors  
Sharon DaBrusco  
Pamela Fau  
Alyssa Feder  
Eamonn Gunther  
Thomas Joyce  
Shaun Kelley-Perrone  
Donald Kissane  
Elyssa Kupferberg  
Donn Londeree  
Leslie McCullough  
Linda Melcer  
Daniel Montilla  
JoAnn Murphy  
Jeanne Nolan  
Kathleen Wolf  
Adam Workman  
Catherine Zieman  
Mark Walters

**PLANNED GIVING PROFESSIONALS**

Danielle Cameron  
Mary F. Dean  
Irv Geffen  
Mark W. Glickman  
Debbie Hammer  
Mark Kasper  
Vicki S. Katz  
Terri Murru  
Carolyn Rose  
David A. Rutherford  
Ronald Stearn



**GREATER BOCA RATON  
ESTATE PLANNING COUNCIL**

**2010-2011**

**SCHEDULE OF PROGRAMS**

**GOALS**

The goals of the Greater Boca Raton Estate Planning Council shall be:

1. To provide a better understanding of the services which professionals in the estate and financial planning fields can render for their clients and the general public;  
and
2. To promote cooperation between professionals in the estate and financial planning fields and to foster a better understanding of the proper relationship which such professionals bear to each other, their clients and the general public.

All programs will be held at Woodfield Country Club unless otherwise noted, starting at 5:30 p.m.

**September 15, 2010**

**Sponsor - US Trust, Bank of America  
Cocktail Reception**

at U.S. Trust, Bank of America  
Private Wealth Management

**October 5, 2010**

**Sponsor - FirstLantic Healthcare  
Speaker - Linda Griffin, JD., CPA**

Topic - *“Roth Conversions: The New Challenges-Will A Roth Conversion, Recharacterization or Reconversion Help?”*

**November 23, 2010**

**Sponsor - BNY Mellon**

**Speaker - Patrick Lannon, Esq. and Barry  
Flagg - The insurance advisor.com**

Hot Topics - *“Trustee Liability/Opportunity in Managing Life Insurance Trusts”*

**January 18, 2011**

**Sponsor - Poser Home Safety**

**Speaker - Lauren Detzel, Esq.  
& Sam Ullman, Esq.**

Topic - *“Expected Tax Reform: Will Congress Get its Act Together”*

**February 22, 2011**

**Sponsor - Wells Fargo Private Bank  
United Nursing Services**

**Speaker - Alice L. Rokahr -  
Wells Fargo Legacy Trust**

Topic - *“Multi-Jurisdictional and Multi-Generational Planning”*

**April 26, 2011**

**Sponsor - Community Foundation for Palm  
Beach and Martin Counties**

**Speakers - Richie Comiter, Esq. and  
Andrew Comiter, Esq.**

Topic - *“Intergenerational Philanthropy”*