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Theresa Balducci is an associate in the Private Clients practice group. She focuses her practice on estate and tax planning, advising clients of ultra-high net worth to those of modest wealth. Theresa routinely represents fiduciaries in Surrogate's Court proceedings and advises individuals and institutions with respect to the estate administration process. She counsels clients with regard to the New York probate system and federal and state tax returns.

Previously, Theresa focused on estate planning and estate administration at a New York boutique trusts and estates firm. Theresa also worked as a Private Client Fiduciary Advisor for Wilmington Trust, N.A, where she advised in wealth preservation and complex personal trust and fiduciary matters.

Theresa volunteers for the City Bar Justice Center's Planning and Estates Law Project, where she advises low income New Yorkers on wills, probate, and estate administration matters.

Education

New York Law School, J.D., 2013

University of Massachusetts at Amherst, B.A., 2010, cum laude, Political Science and Legal Studies

Bar Admissions

New York, 2014

New Jersey, 2013



Jennifer M. Boll, Esq.
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Jennifer is a valued partner to and trusted advisor of her clients. She focuses her practice on corporate, tax, and estate and business succession planning matters. Jennifer advises privately held companies and individuals with respect to a wide range of corporate and tax matters, including mergers and acquisitions, real estate, financial transactions, and complex trust and estate matters.

In addition to her legal practice, Jennifer is a lecturer for the M.S. in taxation program at the University at Albany, State University of New York, where she teaches courses on federal, state, and interstate taxation. She is also an adjunct professor at Albany Law School, where she teaches courses on corporate tax, partnership tax, state and local tax, and estate planning.

Education

Harvard Law School (J.D., *cum laude*, 1999)
Siena College (B.A., *summa cum laude*, 1996)



Erica T. Dubno, Esq.
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Erica T. Dubno practiced law with Herald Price Fahringer for 20 years. She represents individuals and corporations in all stages of criminal and civil proceedings, including white-collar criminal defense, free speech matters, and administrative hearings. She has drafted criminal and civil appeals in the federal Courts of Appeals for the Second, Third, Fourth, Eighth and Ninth Circuits, as well as the Supreme Court of the United States, New York's Court of Appeals and the Connecticut Supreme Court. Ms. Dubno was selected as one of the Top 100 Trial Lawyers by the National Trial Lawyers Association.

Ms. Dubno graduated with honors from Oberlin College. She then worked for Shearman & Sterling LLP, before attending Brooklyn Law School, from which she earned a J.D. in 1994. Ms. Dubno, who has received awards for her appellate advocacy, joined the firm of Lipsitz Green Fahringer Roll Salisbury & Cambria LLP at its New York City office in 1995. She subsequently became a member of Fahringer & Dubno.

As a faculty member of Lawline.com, Ms. Dubno presents Continuing Legal Education classes on "Winning Your Case Before Trial"; "The Use of Demonstrative Evidence to Achieve a Successful Outcome"; "The Right to the Effective Assistance of Counsel"; "The First Amendment: Defamation on the Internet"; "10 Techniques for Getting Your Case to the Highest Court"; "Sentencing: Making the Best of a Bad Situation"; and "The Basics of Legal Writing." She teaches for the New York County Lawyers' Association and the Rockland County Bar Association. In addition, Ms. Dubno has lectured at Fordham Law School and the Monroe College Summer Law for High School Students program. Ms. Dubno has also judged the National Moot Court Competition.

Ms. Dubno is admitted to the Bars of New York and New Jersey. She is also admitted to practice before the Supreme Court of the United States, the federal Courts of Appeals for the Second, Third, Fourth, Eighth, Ninth and Tenth Circuits, and the District Courts for the Southern, Eastern and Northern Districts of New York, as well as the District of New Jersey.



David L. Ferstendig, Esq.
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David L. Ferstendig of Law Offices of David L. Ferstendig, LLC litigates a spectrum of civil and commercial matters including breach of contract, products liability, toxic tort, insurance and reinsurance coverage, jewelers' block, political risk, environmental liability, trade secret, and professional indemnity. With offices in midtown Manhattan, he has served as coordinating counsel for insurers and foreign country defendants on products liability matters throughout the United States. In over 30 years of practice, he has successfully mediated, reserved, litigated, and settled thousands of cases.

Mr. Ferstendig has a well-earned reputation for his uncompromising dedication to his clients' interests and for his broader service to the bench and bar through his writings and teaching.

He is recognized as an authority on New York practice and procedure and is a member of the New York State Bar Association's CPLR Committee, which evaluates and drafts proposed legislation. He is the General Editor of *Weinstein, Korn & Miller New York Civil Practice: CPLR* (LexisNexis), the premier 15-volume litigation treatise cited regularly as authoritative by New York State and Federal courts; author of *Ferstendig, Chase New York CPLR Manual* (LexisNexis) and *LexisNexis AnswerGuide New York Civil Litigation*; and General Editor of *CPLR Practice Insights*, published in *New York Consolidated Laws Service* (LexisNexis).

Mr. Ferstendig has provided expert testimony interpreting the meaning and application of New York law, written articles for *New York Law Journal* and authored or co-authored law review articles.

He is also an Adjunct Professor of Law at Brooklyn Law School, where he teaches New York Practice. He has lectured on civil practice issues for the New York City Bar, New York Judicial Institute, and LexisNexis. Mr. Ferstendig is a graduate of Yeshiva University and received his Juris Doctor degree from New York University School of Law. He is admitted to practice in New York State, in all of the New York Federal District Courts and in the Second Circuit Court of Appeals.

In March of 2015, Mr. Ferstendig was named the editor of the *New York State Law Digest*.



Michael G. Gaynor, Esq.
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Michael G. Gaynor is that Deputy Chief Attorney for the Committee on Professional Standards for the Appellate Division, Third Department, in Albany, New York.

Mr. Gaynor earned a Bachelor of Arts degree from LeMoyne College in 1985 and a Juris Doctor degree from Thomas Cooley Law School in 1992. From 1992 to 1998 he served as an assistant District Attorney in Albany County. He then worked in private practice in Albany with Maynard, O'Connor, Smith & Catalinotto until 1999 when he became staff attorney with the Committee on Professional Standards. He has also served as the acting Chief Attorney of the Committee.

Mr. Gaynor is a frequent lecturer on legal ethics at programs sponsored by the New York State Bar Association and the New York State Trial Lawyers Association. He is a member of the New York State Association of Disciplinary Counsel, 'serving in its Professionalism Section.



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Deborah A. Scalise is a partner in the firm *SCALISE & HAMILTON LLP* in Scarsdale, New York which focuses its practice on the representation of professionals (primarily lawyers and judges) in professional responsibility and ethics matters and white-collar criminal matters. Since 2002, Ms. Scalise has appeared before the Character and Fitness Committees, the New York State and Federal Grievance Committees and the Judicial Conduct Commission.

Prior to 2002, Ms. Scalise was Deputy Assistant Attorney General in Charge of Public Advocacy for the Westchester Region for the NY Attorney General's Office and handled cases involving consumer frauds, civil rights and public integrity matters. Before that, she was Deputy Chief Counsel to the Departmental Disciplinary Committee for the First Judicial Department where she investigated and litigated complex disciplinary matters. She began her career as an Assistant District Attorney in Kings County, where she handled economic crimes and arson cases. Ms. Scalise earned a Juris Doctor from Brooklyn Law School, a Bachelor of Arts Degree from John Jay College, CUNY and a Master of Arts Degree in Forensic Psychology from the John Jay College Graduate School, CUNY.

In 2016, Ms. Scalise was appointed to the NYS Office of Court Administration CLE Board by Chief Judge Janet DiFiore. She also testified before the 2015 OCA State Commission on Professional Discipline with regard to attorney mental health issues. Her authored materials, entitled "Ethically Dealing with Clients, Witnesses and Attorneys with Diminished Capacity," were annexed to the Commission's Report that issued recommendations as to the unification of the New York State disciplinary process.

Active in several bar associations, she is a member of the New York State Bar Association (NYSBA), where she Chaired the Continuing Legal Education (CLE) Committee for five years and serves as a member on the Attorney Professionalism Committee. She is a past Vice President of the Women's Bar Association of the State of New York (WBASNY), serving on its Board of Directors and as Co-chair of its Professional Ethics Committee since 2000. She is a past President, Vice President and Treasurer of the Westchester Women's Bar Association (WWBA), Co-chairing its Grievance/Ethics Committee, and a past President and Treasurer of the White Plains Bar Association (WPBA). She serves as Outreach Co-chair for both the WPBA and the WWBA and is actively involved in educational programs, including "Take Your Children to Work Day", "Law Day" and "Career Day". A member of the American Bar Association (ABA), she served on its Public Sector



Lawyer's Division's Ethics and CLE Committee. She is also a member of the New York County Lawyers Association (NYCLA), serving as a Board Member of its Ethics Institute. She served as the Westchester County Bar Association's (WCBA) Co-chair of the Ethics and Professional Responsibility Committee for two years. As a member of the New Rochelle Bar Association (NRBA), she serves as a Small Claims Court Arbitrator in the New Rochelle City Court. She is also a member of the Federal Bar Council (FBC), the New York State Trial Lawyers Association (NYSTLA), the Brooklyn Columbian Lawyers Association, the Westchester Columbian Lawyers Association and the Eastchester Bar Association.

Ms. Scalise is a frequent CLE lecturer for the: Appellate Division, First, Second and Third Departments; NYS Judicial Institute; NYSBA; NYSTLA; Practising Law Institute; WBASNY; NYCLA, WWBA; WCBA; WPBA; NRBA; FBC; Brooklyn Women's Bar Association; Rockland County Women's Bar Association; NYS Supreme Court Judges Association; NYS Magistrate's Association; NYC Civil and Housing Court Judges; Association; Pace University Law School CLE Program; St. John's University Law School CLE Program; Fordham Law School CLE Program; CUNY Law School CLE Program; NY Civil and Criminal Trial Attorneys Association; NYS Association of Disciplinary Attorneys; and NY County Supreme Court Arbitrators.

Ms. Scalise also volunteers as a Legal Advisor/Coach for Rye Neck High School, Westchester County/New York State Bar Association Mock Trial Competition (Spring 2017). In 2016, Ms. Scalise coached Pace Law School's Team in the National Ethics Trial Competition Team at the Pacific McGeorge School of Law in Sacramento, California. She was an Adjunct Professor at Fordham Law School where she taught Professional Responsibility and Ethics; a faculty member of the Cardozo Law School Intensive Trial Advocacy Program; and a guest lecturer on professional responsibility and ethics at Brooklyn Law School, Columbia Law School, Cardozo Law School, Pace Law School and John Jay College.

Ms. Scalise is a contributing author in "The Dementia Crisis" written by Robert Abrams, Esq., Editor, NYS Bar Association Journal, January 2017. She contributed a chapter to Oxford University Press's *The New York Rules of Professional Conduct: Opinions, Commentary, and Case Law*, a treatise discussing ethical conduct, and frequently contributes articles related to professional responsibility and ethics issues for among others, the NYSBA Journal and State Bar News; the WBASNY and WWBA Newsletters; the WCBA Bar Journal; and the NYSTLA Bill of Particulars.

In 2015 Ms. Scalise and her partner, Sarah Jo Hamilton were honored by NYCBA Lawyers Assistance Program (LAP) for their continued support and contributions to LAP. In 2014, the firm received the WWBA's *Family Friendly Award*. In 2012, Ms. Scalise received WBASNY's *Marilyn Menge Award* and in 2009 she received the *Westchester County Above the Bar Pace Setter Award*. She was the subject of a profile in the ABA's Student Lawyer Magazine in its February 2005 issue.

Gerald Stack, Esq.
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Gerry Stack focuses his practice on tax and corporate matters as well as estate planning. Gerry provides guidance on a wide range of corporate and tax matters including mergers and acquisitions, structuring like-kind exchanges, drafting complex joint ventures, and succession planning.

Gerry's clients include large real estate developers with multi-state real estate holdings, energy companies, large family-owned businesses, individuals in need of sophisticated estate planning, and not-for-profit entities. Gerry also has a significant tax controversy practice both on the federal and state level.

Gerry is heavily involved with firm administration and is General Counsel for the firm.

Representative Experience

- The sale of a nationally-known design firm to a private venture fund. The management of the seller rolled over their equity in a complex tax transaction. The purchase price was paid partly in cash and partly in subordinated notes.
- Sale of a well-known restaurant to a large venture capital fund.
- Sale of a 100% ESOP-owned company to a venture capital fund.
- Sale of a National Hockey League team, the Tampa Bay Lightning.

Admitted to Practice

- New York, 1980
- North Carolina, 2003

Speaking and Publications

- "[Tax Consequences of Government Incentives](#)," *Buffalo Law Journal*, December, 29, 2015
- "The Tax Liability in the USA of Americans Living Permanently Abroad," *ZSteu*, January 2007



- *The Biorefinery in New York-Commercial Cellulosic Ethanol Today, Not in 2012*, Biofuels in New York State Conference, Environmental Business Association of New York, March 2007
- Frequent lecturer and panelist for numerous seminars sponsored by the New York State Bar Association

Professional Affiliations

- New York State Bar Association
- Onondaga County Bar Association
- Syracuse University, Adjunct Professor, Taxation of Pass Through Entities

Prior Experience

- Hiscock & Barclay, LLP, Partner
- Hancock & Estabrook, LLP, Tax Practice Group Leader and Firm Executive Committee

Honors

- *The Best Lawyers in America*®: Syracuse Tax Law "Lawyer of the Year", 2012
- *The Best Lawyers in America*®: Tax Law
- Martindale-Hubbell "AV" Peer Review Rated for Very High to Preeminent Ethical Standards and Legal Ability
- Selected by Peer Review for Inclusion in Super Lawyer Directory 2010-2011 for Tax

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Bruce J. Wagner is Chair of the Family Law Practice Group at McNamee Lochner P.C., Albany, NY, and is a principal and shareholder in that law firm. His primary areas of practice are matrimonial law and appeals. He is a 1982 graduate of Cornell University and a 1985 graduate of Albany Law School of Union University. In September 2002, he was appointed as a Town Justice in the Town of Schodack (pronounced sko'-dak), Rensselaer County, was elected in November 2002, and re-elected in 2006, 2010 and 2014.

He is designated on a regular basis by the Administrative Judge of the Third Judicial District to serve as an Acting City Court Judge in the Criminal and Civil Parts of the District's City Courts. Mr. Wagner is immediate Past President of the Rensselaer County Magistrates' Association, having also served a prior two year term as President in 2010-2011, and is a member of the New York State Magistrates' Association. In October 2016, he was selected by his peers as a Diplomat of the American College of Family Trial Lawyers, a select group of 100 of the top family law trial lawyers from across the United States.

He is listed in all editions 1999 through 2019 of The Best Lawyers in America (Woodward-White) and has a 2018 peer rating of AV® Preeminent™ in Martindale-Hubbell. Based on peer voting, Mr. Wagner has been named to all editions 2007 through 2018 Super Lawyers – Upstate New York, and is included in the 2018 "Top 10" list for Upstate New York. He has also placed in the top 25 in the Hudson Valley for 11 of the last 12 years, including 2018. In October 2011, Mr. Wagner was named the Albany Best Lawyers Family Law Lawyer of the Year for 2012. Mr. Wagner was the subject of a profile entitled "From Constitutional Law to the Court of Appeals" in the 2011 New York-Upstate edition of Super Lawyers. From January 2005 to January 2007, he served as President of the 167 member American Academy of Matrimonial Lawyers, New York Chapter, which is part of a national organization of about 1,600 Certified Fellows. Mr. Wagner is also a Certified Fellow of the International Academy of Family Lawyers. He is a Past Chair (2010-2012) of the 2,700 member NYSBA Family Law Section, having previously served the section for 2 years each as Financial Officer, Secretary and Vice Chair. Mr. Wagner has served



as a co-chair of the Continuing Legal Education Committee of the NYSBA Family Law Section since June 2000.

Since 1998, he has been a representative from the 3rd Judicial District to what is now the Chief Administrative Judge's Matrimonial Practice Advisory and Rules Committee. In April 2015, he was appointed by the Chief Administrative Judge to the Third Department Judicial Hearing Officer Selection Advisory Committee. He is a member of the Rensselaer County, Albany County, New York State and American Bar Associations. Mr. Wagner is a frequent lecturer and author for continuing legal and judicial education programs which have been sponsored by the Albany, Broome, Columbia, Nassau, New York City, Onondaga & Oswego, Queens, Rensselaer, Schenectady and Westchester County Bar Associations, the NYS Bar Association, the American Academy of Matrimonial Lawyers, the Appellate Division (First and Third Departments), the NYS Judicial Institute (Judicial and Court Attorney Seminars), the Association of NYS Supreme Court Justices, the Capital District Women's Bar Association Legal Project, and other organizations.

He has taught at the Advanced Judicial Education Program for Town & Village Justices and at the Basic Certification Course for newly elected Town & Village Justices. Mr. Wagner and his wife, Janet, reside in Schodack and have two children, both of whom work at the same NYC hospital, one in an administrative and training capacity and one as a registered nurse. He has served as: an Assistant Scoutmaster or Committee Member of Boy Scout Troop 53, Castleton and as a Merit Badge Counselor for Twin Rivers Council, Boy Scouts of America, since 2002; a Sunday School Teacher for the First United Methodist Church, East Greenbush; an assistant coach for the East Greenbush Girls' Softball League; Conductor of the former Hendrick Hudson Male Chorus, East Greenbush (1989-2003 and 2011-2016); a co-Conductor of the Yankee Male Chorus (1994-2013); President of the Mohawk-Hudson Male Chorus Association (2008-2016); and as Choir Director for the First United Methodist Church, East Greenbush (2010-2017).