

Message from Outgoing Chair

By the time you are reading this, David Goldfarb is the Chair of our Section. My term as Chair of the Elder Law and Special Needs Section ended, without fanfare, thankfully, on May 31, 2016. David is at the helm, and steering our ship, for these next twelve months and I am already enjoying my new role as Immediate Past Chair.



Immediate Past Chair brings with it the opportunity to work with the current Chair and other officers for another year to ensure continuing momentum on the many important priorities we as a Section have identified. I also get to help plan our Continuing Legal Education agenda for this year. But, what I am enjoying the most is having more free time to continue meeting Section members who share my passion for the practice areas we have in common. Oh, and reading and responding to the Community posts on a more regular basis is certainly a perk of being Immediate Past Chair!

As I started my tenure as Chair, I pledged to do as General Patton suggested: “Don’t tell people how to do things. Tell them what to do and be surprised with their results.” As anyone who has sat in on an Executive Committee meeting can tell you. I sure did tell people what to do! And while I wasn’t exactly surprised with the results, I certainly was impressed and incredibly grateful. I knew our amazing Section members and Executive Committee members would rise to the challenges presented to them this year, and they delivered—big time!

Throughout my year, I have been impressed by the dedication that our Section members have exhibited in advocating for their clients. I have met some wonderful new Section members, and have continued to rely upon the veteran members who remain committed and dedicated to us.

This year, we have successfully navigated another NYS budget session. Spousal Refusal remains an option for Community Medicaid benefits. The CSRA floor remains at \$74,820 and MLTC continues to evolve. We have also successfully advocated to have two legislative priorities approved by NYSBA, and will be advocating to have these two priorities become law. We believe that a person should have the right to waive his or her elective share after the death of his or her spouse, and we

believe that a spousal elective share should be permitted to be placed in a supplemental needs trust. We will advocate to make these proposals law in New York.

We have also, through the dedicated efforts of our Sponsorship Committee, enabled our Section surplus to grow. Our Sponsorship Committee of Elizabeth Briand, Jeannette Grabie, and Lauren Sharkey diligently stacked our meetings with exhibitors and sponsors, providing both educational opportunities and funds for our Section. I now leave David Goldfarb with the unenviable position of being able to spend that surplus for the benefit of our Section.

I am extremely appreciative to those who helped make our Summer 2015 meeting in Newport so successful, and those who helped our Fall 2015 meeting in Saratoga Springs to exceed our goals. Our Annual Meeting 2016 was another stellar gathering of members, and we closed my year with the 2016 UnProgram, which brought together a large group of first time attendees to participate in free flowing discussion on a wide range of topics.

As I count my blessings and express my gratitude, I must acknowledge Kathy Heider and the amazing meetings department staff at NYSBA for helping through it all. Kathy retired before our summer 2016 meeting, but her years of dedication and service to our Section have been invaluable. Plus, she’s been a lot of fun to be with as we’ve adventured throughout the state and northeast at our meetings!

A grateful nod to Lisa Bataille at NYSBA, and to Kathy Plog, our Section’s staff who have helped keep our Section running smoothly.

I turn the reins over to David Goldfarb, and encourage all of you to rely upon his leadership, his knowledge, and his vision for our Section. He has his 2016-2017 agenda set, and needs all of us to carry it out. When I started as Chair, I set my goal to be engaging Section members and expanding the reach of our committees. I am so pleased to have seen membership remain steady and to have seen our committees remain vibrant and engaged.

Thank you to all of you who have given of your time and talents this past year. And, thanks in advance for what I am confident you will do in the years to come.

JulieAnn Calareso