

**Session #1 & 2 – Robert S. Keebler, CPA/PFS, MST, AEP Distinguished, CGMA**



Robert S. Keebler, CPA/PFS, MST, AEP (Distinguished) is a partner with Keebler & Associates, LLP and is a 2007 recipient of the prestigious Accredited Estate Planners (Distinguished) award from the National Association of Estate Planners & Councils. He has been named by CPA Magazine as one of the Top 100 Most Influential Practitioners in the United States and one of the Top 40 Tax Advisors to Know During a Recession. Mr. Keebler is the past Editor-in-Chief of CCH's magazine, Journal of Retirement Planning, and a member of CCH's Financial and Estate Planning Advisory Board. His practice includes family wealth transfer and preservation planning, charitable giving, retirement distribution planning, and estate administration. Mr. Keebler frequently represents clients before the National Office of the Internal Revenue Service (IRS) in the private letter ruling process and in estate, gift and income tax examinations and appeals. In the past 20 years, he has received over 250 favorable private letter rulings including several key rulings of "first impression." Mr. Keebler is nationally

recognized as an expert in estate and retirement planning and works collaboratively with other experts on academic reviews and papers, and client matters. Mr. Keebler is the author of over 75 articles and columns and editor, author, or co-author of many books and treatises on wealth transfer and taxation, including the Warren, Gorham & Lamont of RIA treatise *Esperiti, Peterson and Keebler/Irrevocable Trusts: Analysis with Forms*. Mr. Keebler served as the Chair of the AICPA's Advanced Estate Planning Conference from 2014-2020 and continues to serve on the planning committee. He is a featured columnist for CCH's *Taxes Magazine – "Family Tax Planning Forum,"* Steve Leimberg's "News of the Week Newsletter" and the Bureau of National Affairs Tax Division. Bob is also a contributing author to the American Bar Association's *The ABA Practical Guide to Estate Planning*. Bob frequently is quoted in national publications such as *The Wall Street Journal*, *New York Times*, *Chicago Tribune*, *Baltimore Sun*, *Barrons*, *Bloomberg Wealth Manager*, *Financial Advisor*, *Forbes*, *Kiplinger*, *Lawyer's Weekly*, *On Wall Street*, *USA Today*, *Wealth Manager* and *Worth* in addition to many local and regional newspapers. Mr. Keebler is a frequent speaker for legal, accounting, insurance and financial planning groups throughout the United States at seminars and conferences on advanced IRA distribution strategies, estate planning and trust administration topics including the AICPA's Advanced Estate Planning, Personal Financial Planning Conference and Tax Strategies for the High-Income Individual Conference, the Heckerling Institute on Estate Planning and the Notre Dame Tax & Estate Planning Institute. Mr. Keebler graduated (cum laude) from Lakeland College with a degree in Accountancy and the University of Wisconsin - Milwaukee with a Masters in Taxation. Before practicing in Northeastern Wisconsin, he practiced with Price Waterhouse where he concentrated in taxation.

**Session #3 – Joe Uliana**

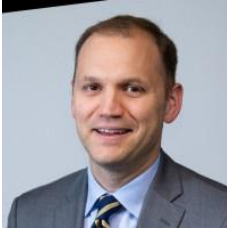


Joseph Uliana founded J.M. Uliana & Associates in 2009 after being involved with state government and Pennsylvania politics for over 20 years. As a former member of the Pennsylvania House of Representatives, a former member of the Pennsylvania State Senate and successful lobbyist, Uliana has demonstrated the ability to use his deep knowledge of state government and public policy to help clients achieve outstanding results.

In 2014, Governor Tom Corbett appointed Uliana to serve as a member of his Transition Team and the following year Governor Corbett appointed former Senator Uliana to be a Commissioner on the Delaware River Joint Toll Bridge Commission. Uliana has served on the Board of Directors of Bethlehem Catholic High School and is Chairman of the Board of the Coalition to Stop Internet Gambling, a national advocacy group dedicated to working with the Department of Justice and Congress to restore the longstanding federal ban on Internet gambling. Previously, Uliana served on the Board of Directors of East Central Pennsylvania Branch of the Juvenile Diabetes Research Foundation. Uliana is also former member of the Board of Directors of PennVEST, The Pennsylvania Energy Development Authority, the Bethlehem Authority, the AIDS Service Center of the Lehigh Valley, Notre Dame CYO and Hanover Crossing Community Association.

A graduate of Lehigh University, Uliana is presently active with the Lehigh Athletic Partnership. In 2015, Uliana was awarded a Mid-Atlantic Chapter Emmy for his work as a Producer on the feature, "The Bethlehem Story". Uliana is married to the former Daphne Ratcliffe and they live in Bethlehem, Pennsylvania, with their three children, Nicholas, Sam and Lauren. They are active members of Notre Dame of Bethlehem Church and were the Honorary Co-Chairs of the Parish Center Building program.

### Session #3 – David M. Goldfarb



David M. Goldfarb is the Director of Advocacy for the National Academy of Elder Law Attorneys (NAELA), where he advocates for individuals with disabilities and older adults, particularly as it relates to long-term services and supports. Previously, he worked as a pension policy analyst for the American Academy of Actuaries. He began his public policy career in the Senate as the Economic Policy Fellow for Bill Nelson. He was inducted into the National Academy of Social Insurance in 2017. He holds a J.D. from Seattle University School of Law and a degree in economics from the University of Colorado.

### Session #4 – Thomas J. Dempsey, Jr.



A partner in our Pittsburgh office, Mr. Dempsey specializes in family law. He provides our clients with outstanding representation in the Allegheny County Orphans' Court Division and other Orphan's Courts. There he litigates in the fields of guardianship, fiduciaries, and estates. As a knowledgeable lawyer on Orphans' Court practice and procedure, he has assisted other attorneys, laymen, and local hospitals' medical and social workers on guardianship issues.

Mr. Dempsey also holds a specialization in civil litigation. In the past, he has served as a law clerk to both the Honorable Ronald W. Folino and the Honorable Bernard J. McGowan of the Court of Common Pleas of Allegheny County.

Practice Areas: Litigation and Employment

Associations: Allegheny County Bar Association (Elderlaw Committee and Probate and Trust Section Council); Pennsylvania Bar Association (Judicial Evaluation Commission); Orphans' Court Procedural Rules Committee

Degrees And Certifications: Juris Doctor Degree from Duquesne University School of Law Evening Division (1987); Pennsylvania Bar Institute

### Session #5 – Marissa Marshall CELA



Marissa Marshall is a founding partner at Kreisher Marshall & Associates, LLC in Bloomsburg, PA who specializes in the areas of elder law, estate planning and administration, guardianship, special needs planning and estate litigation. Ms. Marshall is a certified elder law attorney (CELA) by the National Elder Law Foundation as authorized by the Pennsylvania Supreme Court. A native of Indiana, she obtained her Bachelor of Arts degree from Purdue University and later obtained her Juris Doctorate from Western Michigan University-Cooley Law School in Lansing, MI. Ms. Marshall is a member of the Pennsylvania Association of Elder Law Attorneys, National Academy of Elder Law Attorneys, Pennsylvania Bar Association, Columbia-Montour Bar Association and is an accredited attorney with the Department of Veterans Affairs.

Ms. Marshall is a regular presenter for the Pennsylvania Bar Institute continuing education programs and was contributing author to *Elder Law in Pennsylvania, Ch. 11 – Medical Assistance Marriage Issues* (5th ed., PBI Press 2019). Ms. Marshall is a founder and Co-Chair of Dementia Friendly Susquehanna Valley, a Dementia Friendly America Community which works to provide education and outreach to the those living with Dementia and their care partners throughout the counties of Columbia, Montour, Lower Luzerne and Northumberland. Ms. Marshall is also a member of the Pennsylvania Bar Association Elder Law Council and co-editor of the Pennsylvania Bar Association, Elder Law Division, newsletter.

She is also active in her community as a board member for the Community Giving Foundation and member of the Bloomsburg Kiwanis Club. She also volunteers annually in organizing a charity golf tournament that benefits Pennsylvania Wounded Warriors, Inc

### Session #5 – Marianne Kreisher CELA



Ms. Kreisher is a founding partner at Kreisher Marshall & Associates, LLC in Bloomsburg, where she practices in the areas of elder law, estate planning and administration, guardianship, special needs planning and estate litigation. She earned her B.A. from Penn State University in 1993 and graduated *cum laude* from Widener Law School in Harrisburg in 1996. Following law school, Ms. Kreisher worked in the Pennsylvania Attorney General's Office for eight years as a deputy attorney general handling criminal appeals, grand jury investigations and criminal prosecutions.

Ms. Kreisher is a certified elder law attorney (CELA) by the National Elder Law Foundation as authorized by the Pennsylvania Supreme Court. She is also a National Certified Guardian (NCG) by the Center for Guardianship

Certification and an accredited attorney with the Department of Veterans Affairs. Ms. Kreisher is a member of the Pennsylvania Academy of Elder Law Attorneys and the National Academy of Elder Law Attorneys and currently serves as the Secretary of the Elder Law Section of the Pennsylvania Bar Association. Her law firm is a member of the Life Care Planning Law Firms Association and the driving force behind Dementia Friendly Susquehanna Valley.

Ms. Kreisher has served as adjunct professor at Central Penn College and is a regular presenter for the Pennsylvania Bar Institute continuing education programs. She was a contributing author to *Elder Law in Pennsylvania, Ch. 11 – Medical Assistance Marriage Issues* (5th ed., PBI Press 2019) and is active in her community where she is Past President of Bloomsburg Area School Board, Bloomsburg Kiwanis Club and Columbia/Montour County Bar Association.

### SATURDAY, FEBRUARY 25, 2022

#### Session #6 & 7 – Ellen Freedman



Ellen serves as the Law Practice Management Coordinator for the Pennsylvania Bar Association. In that capacity she assists PBA's members with management issues and decisions on the business side of their practice, including areas like technology, financial management and profitability, human resources, marketing, risk management, setting up a practice and so forth. PBA members are encouraged to contact Ellen through the 800 "Hot Line" at PBA headquarters, (800-932-0311 x2228) or through email ([lawpractice@pabar.org](mailto:lawpractice@pabar.org)).

Ellen is founder and President of Freedman Consulting, which assists PA law firms with a full range of issues and projects on the business side of the practice. More information about Ellen and her law practice management services may be obtained at <http://www.FreedmanLPM.com>. Ellen also publishes the Law Practice Management blog at [www.PA-LawPracticeManagement.com](http://www.PA-LawPracticeManagement.com).

Ellen holds the designation of Certified Legal Manager through the Association of Legal Administrators (ALA), the credentialing body for the CLM degree. Of the 11,000+ members of the ALA, approximately 260 are certified legal managers. Ellen was one of the first 20 in the nation to have achieved this designation. She holds a Certification in Computer Programming from Maxwell Institute, and a Certification in Web Site Design and a B.A. from Temple University. Ellen was inducted as a Fellow of the College of Law Practice Management in October 2020. Membership in the College is by invitation only. Eligible nominees include those who have made significant contributions to the field of law practice management for over ten years. Since its establishment over twenty years ago, nearly 300 practitioners from 5 different countries have become Fellows of the College.

Ellen managed inside law firms for twenty years. Most of that time was spent in a midsize (35+ attorney) firm environment. She launched her consulting practice in 1998 and joined the Pennsylvania Bar Association in 1999.

Ellen is an associate member of the American Bar Association, and its Law Practice Management and General Practice & Small Firm sections. She was a member of the Association of Legal Administrators for over 20 years and founded the Independence Chapter. She is a frequent author and speaker on law firm management issues on a national level.

#### Session #8 – Karyn Seace, CELA



**Karyn Seace** is the Managing Partner at Nescio & Seace, LLP, a firm in West Chester, Pennsylvania. After previously working in a nursing home, Ms. Seace realized her passion for dealing with seniors. She specializes in elder law including Medicaid planning, estate planning, estate probate, trust administration, and guardianships. Ms. Seace is a certified elder law attorney (CELA) as conferred by the National Elder Law Foundation as accredited by the Pennsylvania Supreme Court and is a certified dementia practitioner (CDP) conferred by the National Council of Certified Dementia Practitioners and the International Council of Dementia Practitioners.

Ms. Seace is an accredited attorney with the Department of Veteran Affairs. She is barred in both Pennsylvania and New Jersey. Ms. Seace is a member of the National Academy of Elder Law Attorneys, the Pennsylvania chapter of the National Academy of Elder Law Attorneys, the Pennsylvania Association of Elder Law Attorneys, the Chester County Bar Association, and the Pennsylvania Bar Association. She is the chair of the Elder Law Section of the Chester County Bar Association and a member of the Executive Board of the Chester County Elder Abuse Task Force. She is a member of the Chester County Bar Association's Parkinson's Support Group. Ms. Seace has published numerous articles in the Chester County New Matter magazine and has lectured for PBI, the Chester County Bar Association, the United Way, and has been on WCHE 1520 AM radio numerous times. Additionally, Ms. Seace has been selected as a Top Lawyer for six years in a row in Mainline Today magazine. Ms. Seace is also conversational in American sign language.

She has testified in a couple of cases involving elder law. Ms. Seace started as a secretary in the law firm and then got her Paralegal Certificate at the American Center for Technical Arts & Sciences (Mainline Paralegal Institute). Shortly thereafter entered law school and received her Juris Doctor at Widener University. She then went on to achieve her Letter Law Master at Villanova University (tax).

#### Session #8 – Janet Colliton CELA



**Janet Colliton** is a Certified Elder Law Attorney by the National Elder Law Foundation as approved by the American Bar Association and the Pennsylvania Supreme Court. Her practice, Colliton Elder Law Associates, PC, located in West Chester, PA is limited to elder law, retirement, Medicare, Medicaid, life care, special needs and estate planning and administration. She has also participated in a video program with the American College of Financial Services for the Certified Retirement Income Professional designation.

- Alternately Chair and then Co-Chair and Vice Chair of the Chester County Bar Association Elder Law Section continuously for the past 20 years
- Charter Member of the Academy of Special Needs Planners
- Active Member of the Pennsylvania Association of Elder Law Attorneys
- Member of the National Academy of Elder Law Attorneys
- Lectures extensively on elder health law topics including financing care, retirement income and asset planning, and incorporating disability and health care issues into estate planning
- A co-author of two of the editions of “Elder Law In Pennsylvania,” (Social Security Section), a comprehensive reference resource for other attorneys published by the Pennsylvania Bar Institute
- With Jeffrey Jones, Certified Senior Advisor, she is a shareholder in Life Transition Services, LLC, a company established to assist seniors and their families with long term care planning
- Her firm, Colliton Elder Law Assocs., PC, includes attorney Jennifer Feld, Esq., whose focus is estate administration.

Ms. Colliton has authored a popular weekly newspaper column in the Business Section of West Chester’s Daily Local News every week since 1989 entitled “Planning Ahead” in which she discusses pitfalls and opportunities for seniors in advance planning. This column is currently syndicated and appears also in the Pottstown Mercury, the Lansdale Herald and other newspapers. Ms. Colliton also co-hosts a weekly radio show on WCHE, 1520 AM West Chester on Wednesday’s entitled “A Plan Ahead.”

She was named the Top Elder Law Attorney for the Philadelphia Western Suburbs and Main Line in Main Line Today magazine in 2013, 2014, 2015, and a Top Elder Law Attorney in 2016, 2017, 2018, and 2020 as well as Five Star Wealth manager for Estate Planning in Philadelphia magazine in 2013.

She is a graduate of Chestnut Hill College (AB, Political Science, Class of 1969) and James Beasley Temple University School of Law (JD, Class of 1977).