SPRING SEMINAR ON WILLS, TRUSTS & ESATES

CREATING AN ESTATE PLAN THAT WILL PROTECT YOUR LOVED ONES – DON’T LEAVE IT UNCERTAIN

Gabrielle C. Lese
Susan Rothwell
Stacy Francis

May 21, 2026 / 4:00 pm – 6:00 pm

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GABRIELLE C. LESE

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Gabrielle C. Lese is a shareholder in Anderson Kill's New York office and is a member of the Wills, Trusts and Estates Group. Gabrielle is an experienced trusts and estates attorney with a background in corporate and securities law.

Gabrielle concentrates her practice in estate planning, probate and administration of estates. She helps clients create their estate plans with an integrated view of their family situation, assets and future planning. When appropriate, Gabrielle works with her client’s financial planner to gain a complete view of the client’s assets and financial position and to develop a coordinated plan. She has particular experience assisting blended families with more complex planning. Gabrielle also helps clients with estate planning where there is a family member with disabilities, including, where appropriate, guardianships and special needs trusts.

Gabrielle became a certified mediator to enhance her skill set in conflict resolution, especially regarding disputes among beneficiaries in estate administrations.

Gabrielle has counseled conflicting family members to resolve estate disputes efficiently, avoiding costly litigation. Additionally, she has worked extensively with opposing counsel in potential will contests to reach a reasonable and pragmatic result. The goal is to furnish a resolution where both sides can find peace and closure from one of life’s most dysregulating events. Because Gabrielle also draws from her experience in creating successful estate plans, she can offer her clients an in-depth view of potential outcomes and guide them to an acceptable settlement of these often very sensitive conflicts.

On a pro bono basis, Gabrielle prepares and oversees custody and guardianship cases involving immigrant children in Family Court, ultimately seeking a guardianship or custody order as well as a special findings order as a first step for undocumented minors to seek Special Immigration Juvenile Status. Fluent in Spanish, Gabrielle can speak to most of her guardianship and custody clients in their native language and so build trust and comfort from the start.

SUSAN ROTHWELL

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Susan Rothwell is a shareholder in Anderson Kill's New York office and a member of the Wills, Trusts and Estates practice group.

Susan advises clients on estate and tax planning for wealth preservation and prepares wills, trusts and other vehicles to achieve client goals. Susan also works with clients on strategies to protect assets, minimize taxes and transfer wealth to future generations. For clients who wish to make charitable donations, she suggests strategies that benefit the charity while maximizing tax benefits to the donor. To avoid the expense and emotional trauma of litigation, she works with clients to avoid and manage conflict among family members. Susan also counsels Trustees and Executors on tax, fiduciary and estate administration matters and assists small business owners with estate and succession planning.

Susan advises foreign nationals owning property in New York as well as New York residents owning property in other countries. She assists in planning to minimize transfer taxes and ensures that property will be transferred to beneficiaries with a minimum of cost and delay.

Susan is a frequent lecturer and writer on estate planning topics. She is also a member of STEP, an international organization of estate and financial planners.

STACY FRANCIS

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Stacy is a nationally recognized financial expert with over 20 years of experience in the financial industry. She is one of twenty of the nation's leading wealth managers on CNBC's Digital Financial Advisor Council, and frequently appears in media outlets such as Forbes, Kiplinger, The Wall Street Journal and USA Today. Stacy is dedicated to furthering the financial planning profession, and is the Director of the Association of Divorce Financial Planners' (ADFP) Greater New York Metro Chapter, the National Association of Personal Financial Advisors (NAPFA) and the Financial Planning Association (FPA). Stacy is committed to ongoing professional education, has attended the New York University Center for Finance, Law and Taxation, where she completed the Certified Financial Planner™ (CFP®) designation. Stacy is a Certified Divorce Financial Analyst® (CDFA®), a Divorce Financial Strategist™ as well as a Certified Estate and Trust Specialist (CES™). As much as 10% of all Francis Financial proceeds are donated to charities, including Savvy Ladies™, a nonprofit organization founded by Stacy to educate and empower women to take control of their finances. Savvy Ladies has helped over 20,000 women through free one-on-one financial counseling, workshops, and retreats. Stacy is also host of the podcast, Financially Ever After: Widowhood.

Stacy grew up in the countryside in Michigan, which sparked her love of animals and the outdoors. She enjoys snowboarding, skiing, and horseback riding with her family. Stacy is as active as it gets and she loves her morning boot camp, running marathons and training for triathlons. Her favorite activities include cooking with her kids for their monthly Chopped Cooking Competitions, discovering new wines with her husband, swimming with dolphins in the Bahamas and scuba diving in the Dominican Republic. Captain Stacy and her family are also avid sailors and she recently acquired her sailing certification.

Early in my life, I witnessed how devastating life could be for women who were not empowered through financial education. My grandmother stayed in an abusive marriage because she did not have the skills to effectively deal with money. That experience changed my life and drove me to help women take charge of their finances and become financially empowered.

What is an Estate Plan and Why it is Important?

What is an Estate Plan?

An estate plan is a roadmap for your loved ones to follow.

Basics:

- Will
- Power of Attorney
- Health Care Proxy

(Revocable Trusts are also used as part of an estate plan.)

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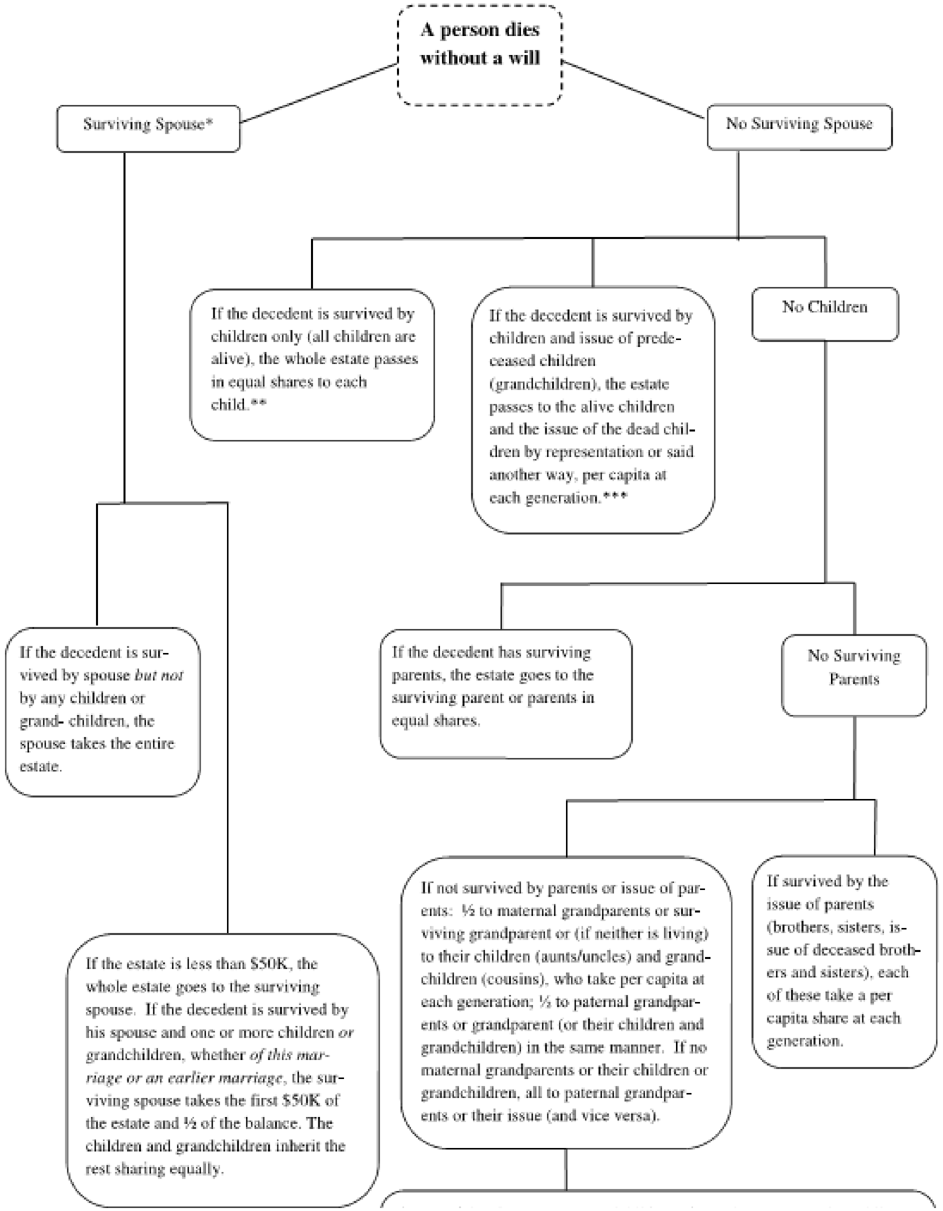
What Happens If You Don’t Have a Will?

Under New York State Law, if a Person Dies Without a Will, Who Inherits Their Assets?



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Avoiding the Pitfalls of Intestacy

Disadvantages of Dying Intestate

Unintended consequences and onerous requirements:

- Domestic partner - nothing
- Stepchildren – nothing
- Second marriage—special considerations-Sue will speak to specific planning
- Bond required by court
- More requirements—funeral bill, affidavit of heirship
- No instructions for young beneficiaries. Court will appoint a guardian to protect the minor's interests. Adds a level of review.
- Fiduciaries not named.
- Guardian for minor children not named.

Assets Passing Outside Your Will

Not all Assets Pass Through Your Will

How do assets transfer on death?

- Joint Ownership
- Beneficiary Designations
- Will

Be mindful that assets can pass by beneficiary designation or jointly as well. This is part of a whole plan, best to be done in conjunction with proper planning.

Triggers to Updating Your Estate Plan

- Divorce
- Moving out of state; purchasing new real property.
- Death in family—aging out.
- Grandchildren, beloved children in-law…

Why Estate Planning Matters More Than You Think

Understanding Intestacy Laws and Their Limitations

Using Trusts to Protect Your Family & Wealth

Protecting Children and Future Generations

Strategic Lifetime Gifting

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Effectively Communicating Your Wishes

Questions & Answers

THANK YOU

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