

2021 Virtual Winter Meeting – Speaker Biographies

FRIDAY, FEBRUARY 12, 2021

Session #1 – William McKendree



Bill McKendree is director of Pennsylvania Healthcare Benefit Support, a non-profit agency helping individuals access affordable healthcare services through counseling, education and advocacy. In addition to his work at PHBS, Mr. McKendree serves as preceptor for the University of Pittsburgh School of Pharmacy internship program at the Birmingham Health Clinic. He also teaches Health Law and Healthcare Policy at the University of Pittsburgh's School of Law and School of Pharmacy

FRIDAY, FEBRUARY 26, 2021

Session #2 – James Lange, CPA/JD and Matthew Schwartz



Jim's estate and tax planning strategies have been endorsed by *The Wall Street Journal* (36 times) and he has authored 8 best-selling books. Jim has authored 5 peer-reviewed articles in *Trusts & Estates*. Jim is a regular contributor for Forbes.com, and his expertise on Roth IRA conversions was published in an article featured in the February 2019 issue of *Forbes* magazine. Some of Jim's books have become classics endorsed by the country's top experts. *Retire Secure!* was endorsed by Charles Schwab, Larry King, Jane Bryant Quinn and Roger Ibbotson; *The Roth Revolution*, endorsed by Ed Slott, and Bob Keebler; *The \$214,000*

Mistake, How to Double Your Social Security and Maximize Your IRAs endorsed by Larry Kotlikoff and Jonathan Clements; and *The Retirement Plan Owner's Guide to Beating the New Death Tax*, endorsed by Burton Malkiel, Larry Swedroe and Stephan Leimberg.



Matt Schwartz, Esq. has been practicing law for 22 years, 17 with the Lange Legal Group. Matt's practice focuses on estate planning and administration with a strong emphasis on retirement benefits. Our clients especially value Matt's technical knowledge, commitment to excellent service and ability to get the job done within reasonable time constraints.

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.

Sessions #3-4 – Marielle Hazen, CELA



Marielle F. Hazen is the founder of Hazen Law Group, a firm dedicated to the practice of elder and special needs planning law, estate planning, tax planning and estate administration. Ms. Hazen has earned the distinction of being a Certified Elder Law Attorney by the National Elder Law Foundation, as authorized by the Pennsylvania Supreme Court. She currently serves on the Board of Directors of the National Academy of Elder Law Attorneys. She is a Past President and one of the founding members of the Pennsylvania Association of Elder Law Attorneys (PAELA), a Past Chair of the Elder Law Section of the Pennsylvania Bar Association, and a Past President of the Special Needs

Alliance, a national nonprofit organization of attorneys dedicated to Disability and Public Benefits Law.

In 2018, Ms. Hazen received the NAELA John J. Regan Writing Award for her article “The Fiduciary Pitfalls of Managing Special Needs Trusts That Own Real Estate.” In 2014, Ms. Hazen was presented with the NAELA Powley Elder Law Award. This national award is presented to an attorney who has demonstrated a commitment to promote, in the minds of the general public, a greater understanding of the rights and needs of the elderly and people with special needs. In 2010, Ms. Hazen was presented with the Excellence in Elder Law Award from the Elder Law Section of the Pennsylvania Bar Association. This award was given in recognition and appreciation of her superior professional efforts in the field of elder law, her significant contributions to the legal profession and her noteworthy service to the elderly. In 2009, Ms. Hazen received an Outstanding Achievement award from the National Academy of Elder Law Attorneys.

Session #4 – Erica Asbell, Esq.



Erica Asbell is the Public Policy Associate for State Chapters for NAELA. She currently serves as a co-chair for the Leading Council on Aging Organization's (LCAO) Health Committee. Before joining NAELA, Erica was a legal aid attorney at Metropolitan Family Services in Chicago, Illinois, where she managed a civil legal help desk for older adults and represented older adults in family violence and financial exploitation cases. She first began working with older adults as a legal fellow through the Equal Justice Works/AmeriCorps Elder Justice Fellows Program. Erica received her J.D. from American University and her B.A. from Lawrence University in Appleton, Wisconsin.

Session #5 – Secretary Robert Torres



Robert Torres was appointed, by Governor Tom Wolf, to serve as Secretary of Aging on January 5, 2019, after serving as Acting Secretary of the Commonwealth since October 11, 2017. He was confirmed by the Pennsylvania Senate on June 4, 2019.

As Secretary, Mr. Torres is responsible for the administration of aging programs and services in the Commonwealth and is committed to ensuring that the department is being responsive to older adults, a population that is growing significantly and becoming more diverse. He believes that strategic partnerships and collaborations will be essential to help meet the demand for services for older adults over 60 years of age; a demographic that currently makes up 25% of the Commonwealth's population and is projected to increase to 30% over the next 10 years. Mr. Torres is also concerned with the level of fraud, abuse, exploitation, and neglect impacting older adults and has made that a priority to address. He is emphasizing the effective use of data and data driven management to help guide priorities and the effective use of resources. Mr. Torres is focused and working to improve aging services to ensure Pennsylvania is a welcoming, safe and quality environment where older Pennsylvanians can age, in a setting they choose, with the dignity and respect that they deserve.

Mr. Torres is an attorney who holds a Bachelor of Business Administration degree from Pace University and a law degree from Widener University School of Law.

Session #6 – William McKendree



Bill McKendree is director of Pennsylvania Healthcare Benefit Support, a non-profit agency helping individuals access affordable healthcare services through counseling, education, and advocacy. In addition to his work at PHBS, Mr. McKendree serves as preceptor for the University of Pittsburgh School of Pharmacy internship program at the Birmingham Health Clinic. He also teaches Health Law and Healthcare Policy at the University of Pittsburgh's School of Law and School of Pharmacy.

SATURDAY, FEBRUARY 27, 2021

Session #7 – Judge Stanley Ott



The Honorable Stanley Ott, retired, started in an Of Counsel role at Mannion Prior in early 2019 to spearhead its ADR practice, and regularly conducts mediations and arbitrations. Prior to working with the firm, Judge Ott served as a Common Pleas Judge in the 38th Judicial District in Montgomery County, PA since 1988. In 1994 he assumed Senior Judge status until his retirement at the end of 2018. Throughout his judicial career, Judge Ott successfully conducted hundreds of settlement conferences.

His professional activities are extensive as leadership for organizations such as PBI, PA Conference of State Trial Judges, Orphans' Court Section, Adjunct Professor for Temple University Beasley School of Law, Villanova University Charles Widger School of Law, etc.

He has published multiple legal opinions published in the Montgomery County Law Reporter and 200 Orphans' Court opinions published in the Fiduciary Reporter. He was also a frequent lecturer on behalf of PBI for multiple county bar association.

He has been admitted to the Pennsylvania Supreme Court, U.S. District Court Eastern District of PA, and U.S. Supreme Court. He attended Cornell Law School and Lafayette College.

Session #8 – Tracy Fox and Kyle Ackerman



Tracy Fox is a cybersecurity consultant who specializes in reducing cyber risk for organizations with resources for ongoing testing, compliance requirements, threat detection and response. The ability to discuss cyber risk in plain English and to make the business case for risk reduction is where Tracy truly adds value. Tracy started her consulting on information technology best practices and moved into the cybersecurity and compliance space over a decade ago.



A veteran of nearly 20 years in information technology consulting, **Kyle Ackerman** joined Stratix Systems in 2017 when the company acquired Lynx Computer Technologies, where he had worked since 2003. Today, Kyle is director of IT operations, responsible for Stratix Systems' complete array of managed IT services and IT consulting services.

Kyle attended Penn State and has completed many certification courses in a wide variety of IT topics. He is a recognized expert in the field of IT and an important part of the astronomical growth of Stratix Systems during the past three years.

Session #9 – Karyn Seace, CELA and Jan Colliton, 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).



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).