



Celebrating Our **44th** Annual Meeting

Annual Meeting and Conference
NOVEMBER 6, 2024

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AND DEMENTIA FRIENDLY”**



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2024 Annual Meeting President's Message



I am excited to welcome our members and guests to the Network in Aging's Annual Meeting. This year, we kick off our 44th anniversary as an organization dedicated to serving the elder population. This event not only brings together professionals in the aging field but also fosters monumental networking opportunities that are crucial for the structure and growth of our organization.

According to Google, networking is defined as “the action or process of interacting with others to exchange information and develop professional or social contacts.” In the context of our Network, I see networking as the act of building relationships by helping others. How do you define networking?

Today's program is centered around the theme of “Better Together.” It emphasizes the importance of using each other's resources, building relationships, and ultimately helping our elder population. Please join me in welcoming our keynote speaker, Bill Armbruster, Senior Advisor for AARP Livable Communities programs, along with our featured speaker, Andrea Koch, Director of Education and Training at the Alzheimer's Association of WNY, who will share insights on how we can be better together.

I would also like to recognize our Education and Special Events Committees for their hard work in organizing today's event. A heartfelt thank you goes to our Diamond, Emerald, and Ruby sponsors for their generous support. And of course, a big thank you to our coordinator, Lisa Boron, whose efforts have been the glue that holds this event together. Without her, none of this would be possible.

Congratulations to this year's Meritorious Service Award and Program of Excellence award winners! Dr. Christopher Jacobus from Hospice & Palliative Care Buffalo is the recipient of the Meritorious Service award and the People Inc.'s NYS Program of Long Term Care Ombudsman Program is the recipient of the Program of Excellence award.

Our organization continues to thrive. If you are new, I encourage you to introduce yourself to as many members as possible and get involved. We have several committees looking for your help. For our seasoned members, we need you too! Be sure to circulate, rekindle old friendships, and make new ones.

Thank you for being here, and let's make this event a memorable one!

Sincerely,

April Romanowski

April Romanowski, President
Network in Aging of Western New York, Inc.

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44th Annual Meeting and Conference

NOVEMBER 6, 2024

CONFERENCE AGENDA

“Better Together: Age Friendly and Dementia Friendly”

“As members of the Network in Aging, we certainly serve our community better together, and we embrace the notion of all members collaborating to support the aging population. In keeping with the theme of BETTER TOGETHER, we bring together two great speakers and topics that blend well to provide us with understanding, insights, and education on how we can strive to bring Age Friendly and Dementia Friendly principles to our approaches, practices, services, products, environments, and communities. **Join us to continue to grow BETTER TOGETHER!**”

8:00-9:15 AM	Registration, continental breakfast, and networking
9:15-9:30 AM	Opening Remarks from April Romanowski, Network in Aging president
9:30-10:45 AM	KEYNOTE SPEAKER: Bill Armbruster Senior Advisor, AARP Livable Communities Programs, Community State & National Affairs
10:45-11:30 AM	*** Networking Break ***
11:30 AM-12:30 PM	SPEAKER: Andrea Koch Alzheimer's Association, WNY Chapter Assoc., Director of Education & Training
12:30-2:30 PM	Luncheon, annual meeting, award presentations, closing remarks
2:30 PM	Basket raffle pickup, conclusion



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Lori Marinaccio
Paraplanner
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Ryan Kozyra, Financial Planner

What to expect:

With over thirteen years of experience in the financial services industry, I take a holistic approach to overall investment planning. Building trust in our relationship is paramount. I pride myself on teaching clients about the market and investment options. Together, we will develop an overall plan to obtain what you set out to achieve.

About me:

Ryan obtained a BA in Psychology from University of Buffalo in 2003. Over the years, he has gained valuable experience in the financial services industry, previously working for John Hancock, First Niagara Bank, M&T Bank, Wells Fargo and now Prudential. He currently lives in Amherst, NY with his two children, Oliver and Landon. In his free time, he enjoys adventures with his kids, kayaking and anything Buffalo Bills related.

Lori Marinaccio, Paraplanner

About me:

Lori embraces the role of overseeing client relationships in the western New York region. Her exceptional skills lie in cultivating new connections and nurturing existing ones, guaranteeing that every client enjoys a personalized experience. Throughout her career, Lori has held similar positions at various financial institutions. Prior to venturing into the financial services industry, Lori successfully owned and operated a franchise for over 20 years. Outside of work, she finds joy in spending quality time with her family, exploring new destinations, showcasing her culinary talents, and actively participating in volunteer work within her local community.

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ABOUT OUR SPEAKERS



AARP
New York

BILL ARMBRUSTER

Senior Advisor, AARP Livable Communities Programs, Community State & National Affairs

Keynote speaker

Bill has been with AARP since 2000, joining as an associate state director for AARP New York. In that role he served the upstate and western region of the Empire State and was responsible for the development, implementation and assessment for community outreach programming. That body of work included livable and age-friendly communities initiatives, partner development and grassroots volunteer organizing for a 30-county region both near and far from his Rochester home base.

Since 2016, Bill has been traveling frequently and far to communities, conferences and meetings nationwide as a speaker and facilitator for the AARP Livable Communities initiative. In addition to his work at AARP, Bill has extensive experience in corporate wellness programs, occupational rehabilitation and ergonomics, pain treatment and physical therapy.

Join us as we dive into the AARP Network of Age-Friendly States and Communities, focusing on the 8 domains of livability – such as housing, transportation, and social participation – as a comprehensive framework for enhancing community well-being. We'll examine how these domains not only guide progress but also expose critical gaps that present opportunities to create more inclusive, age-friendly environments.

With a focus on actionable insights, this session will equip you to evaluate where your community currently stands, identify areas for improvement, and leverage your influence to drive meaningful, lasting change. You'll discover new ways to advance your own age-friendly initiatives, ensuring that community members are included and supported in leading full, vibrant lives.



ANDREA KOCH

Director of Education & Training,
Alzheimer's Association, WNY Chapter

Andrea is the Director of Education and Training at the Alzheimer's Association, WNY Chapter, where she's worked for 8 years. Andrea holds a Master's degree in Art Therapy and worked in long-term care in Chicago for about 10 years before returning home to Buffalo. She's passionate about creative engagement with older adults and supporting and connecting caregivers facing dementia.

Her presentation will follow the outline of Dementia Friendly America's 4-step Community Toolkit: Convene, Engage, Analyze, and Act. She will share how the Alzheimer's Association of WNY works with other community organizations and stakeholders to 1) solicit public feedback, 2) brainstorm collaborative strategies, 3) prioritize goals, and 4) provide free programs and services to support individuals and families facing dementia. Specific examples and resources will be shared.

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Thank You

Many thanks to the Network in Aging Education and Special Events Committee members for volunteering their time and talents in the planning of today's event. Their hard work and commitment to the Network is greatly appreciated each year.

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April Romanowski

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Dr. Evan Calkins
Meritorious Service Award*

Dr. Jacobus has been working with older adults since 2004. Known and adored for his compassionate care for geriatric patients and their families faced with life-limiting illness, he advocates for the respect older adults deserve until their last breath. His reach extends into nursing homes, assisted living residences, group homes and hospitals. He is regarded by the clinical community as an expert in the field and his integrity serves as the foundation for his care.

We are so proud to have Dr. Jacobus as an integral part of our team and to be recognized for his incredible work and accomplishments.



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2024 RECIPIENT OF THE NETWORK IN AGING MERITORIOUS SERVICE AWARD

Dr. Christopher Jacobus

Hospice & Palliative Care Buffalo



The Network in Aging is proud to present the 2024 Evan Calkins Award for Meritorious Service to Dr. Christopher Jacobus from Hospice & Palliative Care Buffalo. Board certified in both Internal Medicine and Palliative Care, Dr. Jacobus has been working with older adults since 2004. Known for his compassionate care for geriatric patients and their families faced with life-limiting illness, he advocates for the respect older adults deserve until their last breath.

As the medical leader of the Long-Term Care Division at Hospice & Palliative Care Buffalo in

2006, "Dr. Chris" tends to the aging in our community in every nursing home, assisted living facility and group home throughout Erie County when they are deemed eligible for hospice or palliative care. His clinical acumen is undergirded with a gentle and compassionate sense of empathy that is unmatched. He addresses the individuals needs of each patient and their families in the most caring and understanding manner.

Dr. Jacobus is regarded by the clinical community as an expert in the field, and his integrity serves as the foundation for his care.





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2024 RECIPIENT OF THE NETWORK IN AGING PROGRAM OF EXCELLENCE

NYS Ombudsman Program



**Office of the State
Long Term Care
Ombudsman**

For more than 13,000 older adults and people living with disabilities in Western New York's long-term care facilities, the Region 15 NYS Ombudsman Program serves as a crucial lifeline. Its mission? To ensure residents' rights are upheld, offering much-needed advocacy, education and means of empowerment.

"We are the voice of the voiceless," says Susan Fenster, the program director for Region 15. "Many residents in nursing homes, assisted living facilities, and adult care homes are among the most vulnerable in our community. They often don't have family or friends who can advocate on their behalf. That's where we come in—we make sure their rights are protected."

The program covers 118 long-term care facilities across Erie, Niagara, Chautauqua, and Cattaraugus counties, providing support to residents who may otherwise go unheard.

The Ombudsman Program was established in the 1970s under the federal Older Americans Act. While the federal government oversees the program's framework, each state runs its own operations. In New York, this responsibility falls under the Office of the Aging. Since 2016, People Inc. has hosted the program for Region 15, managing it through a state grant.

Volunteers are at the core of this work. Supported by a small staff, these trained individuals dedicate themselves to helping residents by listening to their concerns, investigating issues, and working to resolve complaints. In 2024 alone, Region 15's volunteers donated more than 4,200 hours to advocating for a better quality of life for residents.

To become a certified ombudsman, volunteers complete a 42-hour training and mentoring program that equips them to handle resident concerns. Beyond that, ongoing education is required -- volunteers need to earn 18 in-service credits annually and dedicate time each week to visiting residents in assisted living or skilled nursing facilities.

While the NYS Department of Health conducts annual surveys and periodic investigations, ombudsmen are the only other independent overseers dedicated solely to advocating for residents. Their role is to put residents' needs first, free from any outside influence from families or facility staff.

Ombudsmen deal with a range of concerns, from complaints about facility conditions to external issues like government benefits, medical appointments, and other referral sources. They also assist families navigate the long-term care system, though Ombudsman must always obtain resident permission to investigate or share information. In every instance, the resident comes first.

Since the pandemic, the New York State Legislature has provided additional funding to help expand staffing, allowing the program to manage a growing number of hotline complaints, volunteer activities, and facility visits.

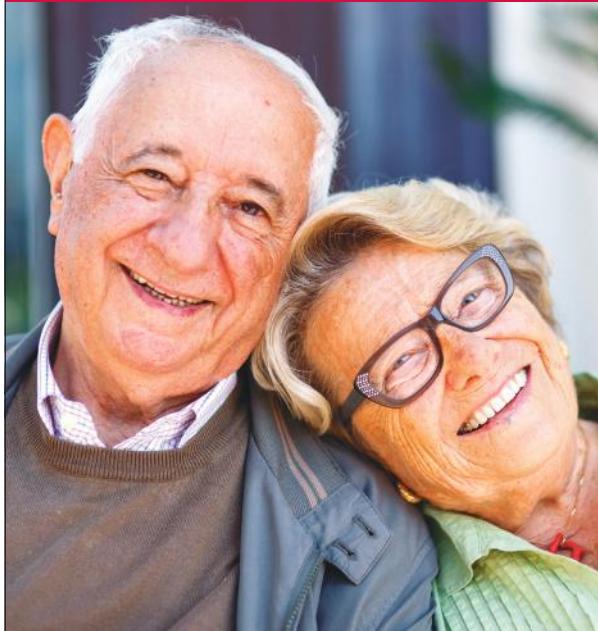
Ultimately, the Ombudsman Program is about empowering older adults and people with disabilities to understand and exercise their rights, ensuring they receive quality care in an environment that respects their dignity.



Ombudsman volunteer Tom Sadowski with resident Constance Snell at the Buffalo Center Nursing Home and Rehab.

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2022	Danette Porto – West Side Community Services
2021	Jennifer Guni – Harmonia Collaborative Care
2020	Margaret Kleinmann – Solstice Senior Living at East Amherst
2019	Pamela Krawczyk – Amherst Center for Senior Services
2018	Lynn Riker – The Center for Hospice & Palliative Care
2017	Leilani Joven Pelletier – Center of Excellence for Alzheimer's Disease
2016	Michael Olear – Olear Realty Group, Inc.
2015	Charles Battaglia, Jr – Kenmore Tonawanda Meals on Wheels
2014	Bonnie McMorrow, Meals on Wheels & Hearts and Hands: Faith in Action
2013	Laura Mondello, Schofield Residence
2012	Helen Ferraro-Zaffram, Esq, Legal Services for Elderly, Disabled or Disadvantaged Volunteer Program, Amherst Senior Center
2011	Robert Chur, President and CEO of Elderwood Senior Care
2010	Toby Laping, Ph.D., L.M.S.W.
2009	John W. Kinner, Health Association of Niagara County Inc.
2008	Beverly A. Kubala, RN, Geriatric Care Managers of WNY, LLC Schofield Adult Day Health Care Program
2007	David Dunkelman
2006	Mary Ellen Walsh, M.S. W., Executive Director, Amherst Center for Senior Services
2005	Georgiana Jungels, Professor, State University at Buffalo
2004	Bruce D. Reinoso, Esq., Partner in Magavern Magavern & Grimm LLP
2003	Rhonda Frederick, People Inc.
2002	Jerry Flaschner, Living Prime Time Magazine
2001	Bea Berman, Advocate for the Elderly and Volunteer - NYS Wide Senior Action Council
2000	Dr. Kenneth Garbarino/Kaleida Health/Millard Fillmore Hospital
1999	Rose Marie Hall, The McLaughlin Center of Kaleida Health/DeGraff Hospital
1998	Dr. John Edwards, Veterans Administration Medical Center
1997	Robert Meiss, Beechwood Continuing Care
1996	Joanne Senall, Corporation for Senior Services Programs
1995	John Feather, Ph.D., WNY Geriatric Education Center
1994	Michael Maloney, The Bristol Home
1993	Clifford Whitman, Concerned Ecumenical Ministry (CEM)
1992	Maryanne Bolles, Coordinated Care
1991	Richard J. Gehring, Meals on Wheels of Buffalo and Erie County
1990	Francis "Mac" McCoy, Chautauqua County Office for Aging
1989	Jurgis Karuza, Ph.D., WNY Geriatric Education Center & Multidisciplinary Center on Aging
1988	Joyce Savasta, MSN, Buffalo Psychiatric Center
1987	Lillian Meadows, Alfred D. Price Senior Citizen Center
1986	Lillian Meadows
1985	Milton Rogovin, Richard Newberg and Lou Glasse, Special Commendation in recognition of outstanding artistic and media contributions

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- 2022 Cheektowaga Senior Mobile Food Pantry (Resurrection Life)
- 2021 Center for Elder Law - Enhanced Multi-Disciplinary Teams (E-MDT) WNY HUB
- 2020 Elderwood's Right Moves Wellness Program
- 2019 WNY Coalition Pooled Trusts: a collaboration between People Inc. and Center for Elder Law & Justice
- 2018 University Express Project: Patricia Dowling of Erie Co. Senior Services
- 2017 The Pride Center of WNY, Inc.- Silver Pride Project
- 2016 Rural Transit Service
- 2015 United Church Home Society Senior Wishes
- 2013 The Burchfield Penney Art Center Early Diagnosed Alzheimer's Program
- 2011 Alzheimer's Association, Western New York Chapter Silver Alert Initiative
- 2008 Schofield Adult Day Health Care Program
- 2007 The MultiDisciplinary Coordinating Council on Elder Abuse
- 2006 People Inc. Senior Housing
- 2005 Erie County Caregivers Coalition
- 2004 Meals on Wheels of Buffalo and Erie County's Home Delivered Meals for the Elderly
- 2003 The Chautauqua Adult Day Care Centers, Inc.
- 2002 Senior Employment Program/Supportive Services Corporation
- 2001 Legal Services for the Elderly, Disabled and Disadvantaged (LSED)
- 2000 The Telephone Assurance Program (TAP) operated by Coordinated Care
- 1999 The Salvation Army Senior Olympics
- 1998 The Foster Grandparent Program of Buffalo and Erie County, Catholic Charities
- 1997 Gloria Olmsted, Erie County Department of Senior Services
- 1996 Care Connection, Inc
- 1995 The Staywell Health Education Course developed by The McLaughlin Center/DeGraff Hospital
- 1994 Hospice Buffalo Nursing Home Services
- 1993 The Western Region, NYS Adult Day Services Association & Intergenerational Program - Preschool Children & Older Adults
- 1992 Elder Abuse/Caregivers Services, Niagara County Family Violence Project
- 1991 Erie County Long Term Care CHOICES Program
- 1990 Alzheimer's Disease and Related Dementias Association (ADRDA), WNY Chapter
- 1989 National Fuel's Assistance Programs for Seniors
- 1988 Buffalo Psychiatric Center
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HEAP Assistance

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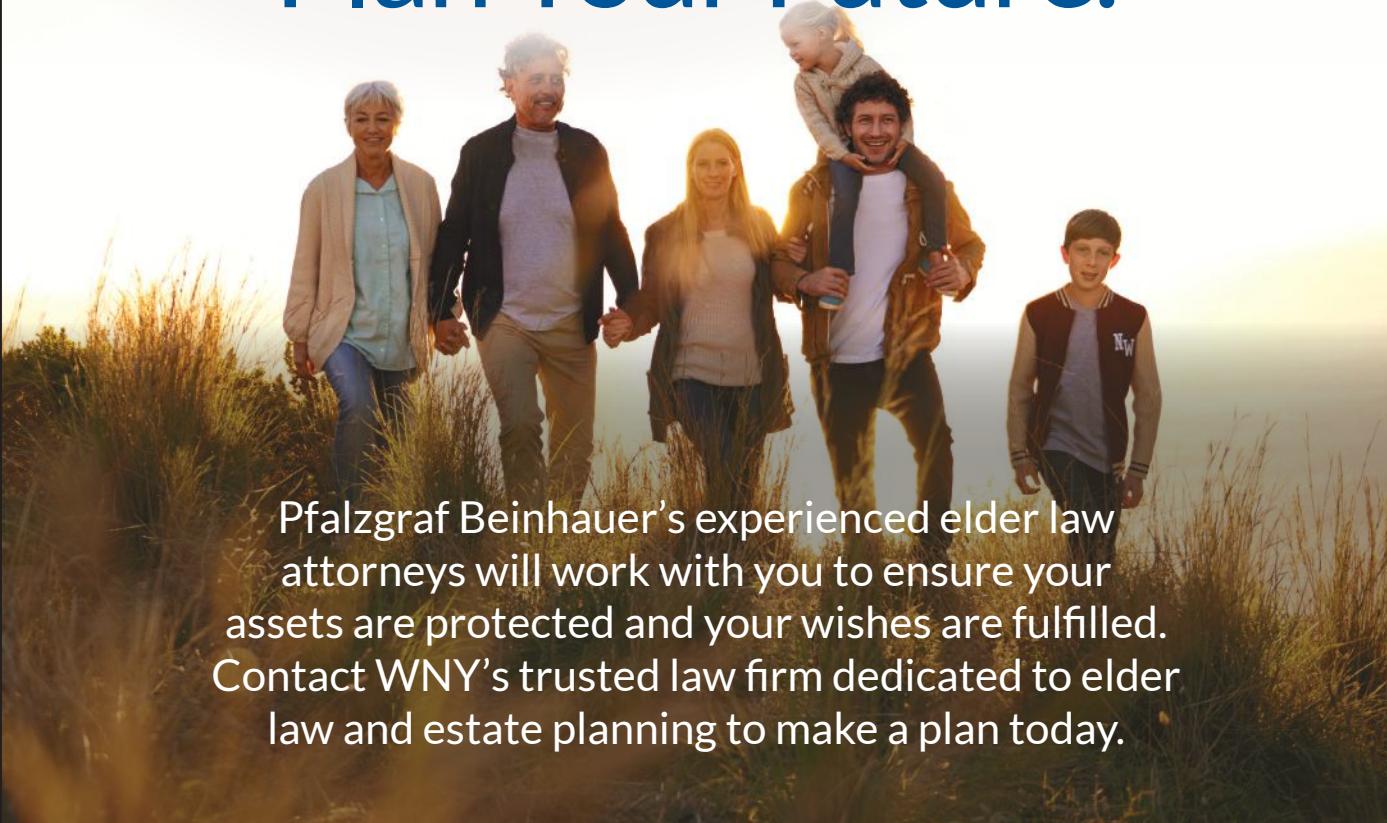
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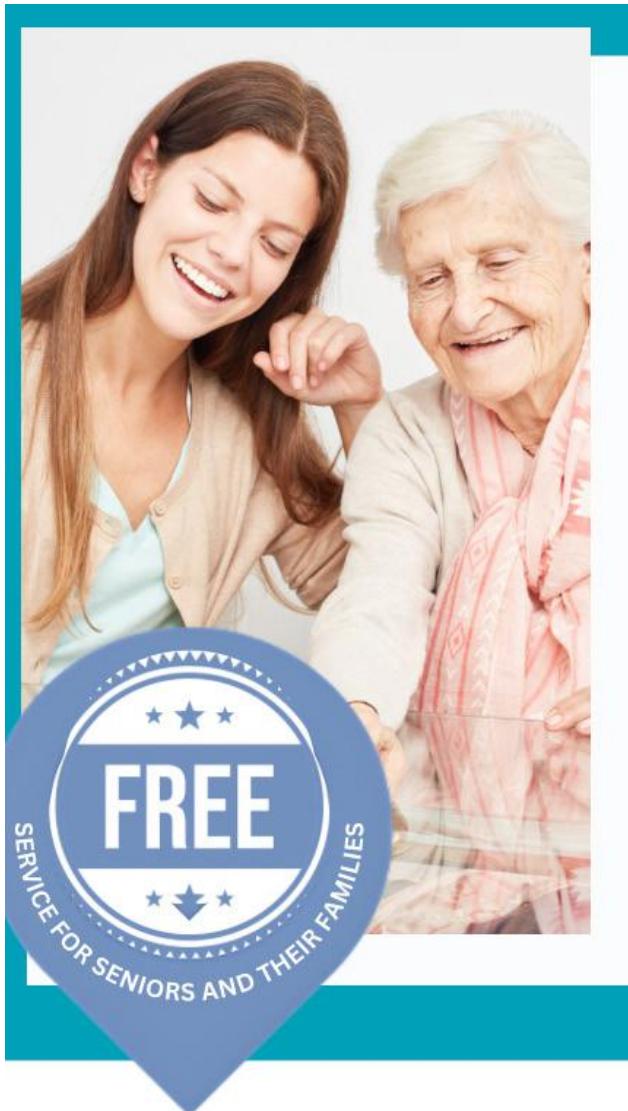
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COMMITTEE CO-CHAIRS & MEETING INFORMATION

Please be sure to verify meeting date, time and location
as there are occasional changes!

COMMUNICATIONS COMMITTEE

Establishes and directs the Network's print and online communications with its members and the public. Meetings are on the **second Tuesday** of the month at 10:00am.

CO-CHAIRS

Pamela Pace
pamela@amazinghc.com
716-863-9035

Paula Venné-Clendening
pvenne@walshduffield.com
716-255-1593

EDUCATION COMMITTEE

Plans and carries out educational programs/workshops on aging related issues, along with planning and preparation for the annual meeting. Meetings are on the **second Thursday** of each month at 9:00am.

CO-CHAIRS

Crystal Selk
cselk@wscsbuffalo.org
716-884-6616

Ryan Kozyra
ryan.kozyra@prudential.com

MEMBERSHIP COMMITTEE

Reviews and recommends changes in membership dues and benefits; coordinates ongoing membership recruitment efforts. Meetings are on the **fourth Thursday** of each month at 8:30am. No meetings in August and December.

CO-CHAIRS

Jane Nogowski
jnogowski@brothersofmercy.org

Mimi Piciullo
mimipiciullo@gmail.com
716-698-1089

NETWORKING COMMITTEE

Plans and carries out member-to-member functions, including Networking events. This committee meets the **first Thursday** each month at 9:00am. Additional dates may be scheduled.

CO-CHAIRS

Stacy Jasinski
sjasinski@depaul.org
716-608-7000

Stephanie Mruczek
eastamherstdsm@solsticeseniorliving.com
716-688-7880

SPECIAL EVENTS COMMITTEE

Plans social functions for the Network, including the January Social, Taste of the Network and annual meeting venue. Meetings are on the **fourth Tuesday** each month at 8:30am. No meetings in January, July and December.

CO-CHAIRS

Bonnie McMorrow
bmcmorrow@feedmorewny.org
716-822-2002

Sharon Plant
splant@people-inc.org
716-817-9229

NOMINATING COMMITTEE

This committee solicits and accepts nominations for positions on the Network in Aging Board of Directors and presents a slate of officers and directors to the membership for their consideration.

CO-CHAIRS

Dr. Kara Calandrelli
karaanncalandrelli@gmail.com
716-689-4195 ext 111

Michael Olear
michael@olear.com
716-481-9959



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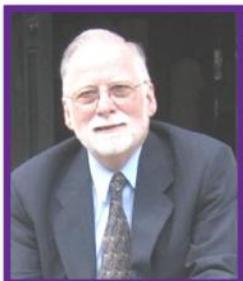
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Supportive Services Corporation

Weatherization Assistance Program

Supportive Services Corporation provides free weatherization assistance to income eligible Erie County residents outside the City of Buffalo.

	<u>Income Guidelines</u>		
	<u>Family</u>	<u>Monthly</u>	<u>Annual</u>
	<u>Size</u>	<u>Income</u>	<u>Income</u>
What may be done to reduce energy cost?	1	\$3,035	\$36,420
• Attic and wall insulation	2	\$3,970	\$47,640
• Weather-stripping and caulking of windows and doors	3	\$4,904	\$58,848
• Appliance replacement	4	\$5,838	\$70,056
• Clean and tuning of furnaces	5	\$6,772	\$81,264
Who is eligible?	6	\$7,706	\$92,472

How to Apply

For application information, please contact our office at the information listed below.



Agency Contact Information

Address: 201 St Mary's Street
Lancaster, NY 14086

E-mail: Weatherization@supportiveservices.org

Phone Number: 716-685-6252

Fax Number: 716-685-2601

Website: www.supportiveservices.org



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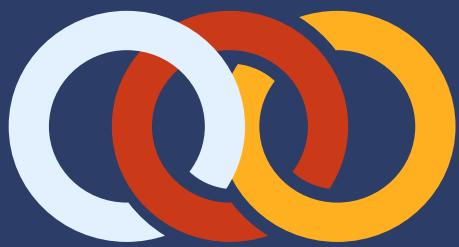
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Supporting seniors in enjoying their favorite pastimes and activities.



TRANSPORTATION TO APPOINTMENTS

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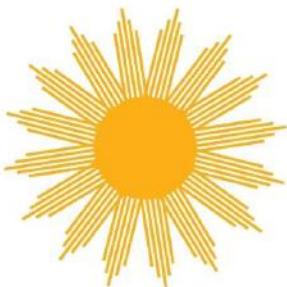
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People Inc.

People Inc., a multispecialty non-profit health and human services agency, provides programs and services to more than 12,000 people with intellectual and developmental disabilities, families and older adults throughout Western New York and the Greater Rochester region. For over 50 years, the agency has assisted people to achieve greater degrees of independence and productivity

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With 20 locations throughout Western New York, People Inc. Senior Living Apartments are for those age 62+ and who are income-eligible. The agency offers a Senior Companion Program and Senior Outreach (case management), as well as a day program that helps people with memory loss.

Additionally, People Inc. manages the New York State Long Term Care Ombudsman Program, which provides advocacy for older adults who live in nursing homes, assisted living and licensed adult care locations. Home Health and People Inc. Rehabilitative Services are also available.

People Inc. Affordable Apartments provide reasonably-priced, safe apartments for those who are income-eligible in Erie and Niagara Counties. These communities are for people 18 and over or an age requirement of 55 and over.

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Rupp Pfalzgraf LLC is ranked among the top five full-service law firms in Western New York, known for both our extensive legal experience and unwavering commitment to our clients. Beyond being exceptional attorneys, we focus on understanding and meeting each client's unique needs. We take pride in always putting clients first and leading with compassion in everything we do.

Aging can bring about stress and financial challenges for both seniors and their families. Our goal is to guide you through every challenge with thoughtful support. Whether you're planning for the future with our Trusts & Estate Planning and Elder Law groups or you're a nursing home seeking legal guidance, we offer tailored solutions and compassionate care. From helping individuals navigate life's transitions to supporting healthcare centers through navigating the complexities of health law, our team is here to assist you at every stage.

Our Elder Law team offers a full range of legal services designed to address the needs of seniors and their families. We handle Medicaid planning and applications, crisis and long-term care planning, asset protection, and more. Our experienced attorneys will help you secure the Medicaid benefits needed for long-term care, craft personalized strategies to protect your assets and ease financial strain, and select the right care facility based on your preferences and needs.

Our Trusts & Estate Planning team is dedicated to creating a reliable plan for you and your family's future. As you age, having a solid estate plan becomes crucial. Our attorneys assist with all aspects of trusts and estate planning, including wills, power of attorney, health care proxies, living wills, tax planning, and business succession plans. We collaborate with you and your financial advisors to develop a plan that safeguards your assets and honors your wishes.

The Rupp Pfalzgraf Health Law group is committed to providing thorough legal support for senior care facilities. Whether it's Medicaid and Medicare audits, guardianship appointments, or HIPPA compliance, our team is here to help your facility so you can focus on what you do best - providing exceptional care to our community's seniors.

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Tennyson Court

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For over 20 years, Tennyson Court has been considered the premier assisted living and memory care community in WNY. Our private ownership and tenured management provide the community with compassionate leadership that makes Tennyson a special place to be.

At Tennyson we strive to:

- Provide outstanding care.
- Promote independence.
- Preserve mental ability.
- Provide a beautiful place for our residence to live and thrive.

Family Choice of New York has been serving Western New York since 2005 and is dedicated to providing **comprehensive clinical and care management programs** to individuals who are medically complex. **Independent Health's Medicare Family Choice HMO I-SNP** is a Special Needs Plan for permanent residents of participating skilled nursing and assisted living/adult care facilities. **Independent Health's Assure Advantage HMO C-SNP** is a Special Needs Plan for individuals in the community who are diagnosed with a form of Chronic/Congestive Heart Failure. **Please call Family Choice of New York** at (716) 668-7051 for more information and check out our website www.familychoiceny.com.



Family Choice OF NEW YORK



Wheatfield Commons
A DePaul Senior Living Community

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www.depaul.com
Assisted Living • Memory Care



Wheatfield Commons is a DePaul Senior Living Community in North Tonawanda, which provides both assisted living and memory care accommodations to families in and around Niagara County. Offering gracious, single floor living in a well-appointed setting, the community features spacious, furnished private and semi-private suites with a choice of floor plan and fully equipped bathrooms in every resident room.

Close to shopping, restaurants and places of worship, Wheatfield Commons is nestled in a park-like suburban setting with inviting grounds and courtyards. In warmer weather, residents enjoy taking in the sights from a large covered front porch. Welcoming living areas with fireplaces and beautifully decorated dining areas are all part of an accommodating, enriching atmosphere where residents receive the highest quality services and care. A cozy family dining room is available for private use and special occasions and individual mailboxes are also provided.

Wheatfield Commons provides seniors a lifestyle for their future, offering a personal approach to delivering support and services while encouraging family members to be actively involved in the care of their loved ones. Staff work closely with residents and family members to develop a personalized approach to delivering support and services which appropriately meet each residents' needs.

SPONSOR SPOTLIGHTS

Since 1988, Niagara Hospice, a 501(c)(3) nonprofit organization, has provided end-of-life comfort, care and support to more than 30,000 Niagara County individuals and families faced with terminal illnesses.

Niagara Hospice maximizes moments by treating the patient, not the disease. The hospice team provides expert symptom management, caregiver relief and comprehensive end-of-life guidance to the entire family to help everyone cherish precious time together.

In the words of patients & loved ones...

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Ryan Kozyra, Financial Planner

What to expect:

With over thirteen years of experience in the financial services industry, I take a holistic approach to overall investment planning. Building trust in our relationship is paramount. I pride myself on teaching clients about the market and investment options. Together, we will develop an overall plan to obtain what you set out to achieve.

About me:

Ryan obtained a BA in Psychology from University of Buffalo in 2003. Over the years, he has gained valuable experience in the financial services industry, previously working for John Hancock, First Niagara Bank, M&T Bank, Wells Fargo and now Prudential. He currently lives in Amherst, NY with his two children, Oliver and Landon. In his free time, he enjoys adventures with his kids, kayaking and anything Buffalo Bills related.

Lori Marinaccio, Paraplanner

About me:

Lori embraces the role of overseeing client relationships in the western New York region. Her exceptional skills lie in cultivating new connections and nurturing existing ones, guaranteeing that every client enjoys a personalized experience. Throughout her career, Lori has held similar positions at various financial institutions. Prior to venturing into the financial services industry, Lori successfully owned and operated a franchise for over 20 years. Outside of work, she finds joy in spending quality time with her family, exploring new destinations, showcasing her culinary talents, and actively participating in volunteer work within her local community.

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Understanding that clients have unique financial situations and personal objectives, Harris Beach attorney Judy Wagner listens carefully and considers all factors involved when advising clients in developing and implementing successful, customized solutions for the preservation, management and transfer of wealth to the next generation. Harris Beach attorneys have extensive experience using comprehensive and sophisticated planning strategies to help clients navigate the seemingly overwhelming complexities of estate planning, disability planning, and elder law and to meet their individual, family, and business succession needs in a tax-efficient and cost-effective manner.



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