

2022-2023

B E P C

B O S T O N  
ESTATE PLANNING COUNCIL

*WELCOME  
PACKET*





I am honored to serve as the 92<sup>nd</sup> President of the Boston Estate Planning Council (BEPC). BEPC is one of the oldest and largest estate planning councils in the country and I am proud to serve for a brief moment in its storied history.

I am in awe of what BEPC has accomplished over these past few years, remarkable given the uncertainty surrounding the pandemic. Thank you to my fellow officers, board members, and members for your hard work and comradery. We've learned that we cannot predict exactly what will happen, but we can create an environment that allows us to be ready for anything. We have proven that we are able to adapt to our surroundings and to have a meaningful impact on our community. We have a leadership structure that has evolved over time, and I hope to build on our strong foundation: to incorporate different ways for leadership to hear new ideas and act on them; and new ways for members to participate and feel heard and valued when they do. I look forward to collaborating with fellow professional advisors, as well as with other professional groups in the greater Boston area in the coming year.

While many of our events are open to guests, I invite you to take advantage of the organization's many members only resources, such as seminar recordings, written materials, newsletters, and our member directory, all housed on the website under "**Member Resources.**" Connect with fellow members online via our website's **My Feed and Forums**, as well as **BEPC's LinkedIn group**. And most of all, take advantage of our many educational and networking event offerings. I look forward to seeing you there.

Beth Milkovits  
President, Boston Estate Planning Council



Welcome to the Boston Estate Planning Council (BEPC)! Joining an organization can be a little overwhelming. Our welcome packet is designed to provide you actionable information on how to get started, get connected, and get involved.



## GET STARTED

### UPDATE YOUR PROFILE

Take the time to build out your online profile on [www.bepc.org](http://www.bepc.org). Once you log into [www.bepc.org](http://www.bepc.org), select "Manage Profile," to update your contact information, upload a profile picture, set up your notification settings, and send invitations to connect with fellow members.

[Update Profile](#)

### MEMBER RESOURCES

As a member, you now have access to the members-only Member Resources. Browse recorded webinars, past event materials, newsletter archives, and other materials.

[Check out the Resources](#)

### BEPC CODE OF CONDUCT POLICY

BEPC is committed to the equitable treatment of all members and other participants and to fostering an environment that is safe, inclusive, and comfortable for all. All BEPC members and other participants are obligated to conduct themselves professionally, appropriately, and ethically. Disruptive or harassing behavior of any kind is not tolerated by BEPC. [Read the Policy](#)



## GET CONNECTED

### BEPC FEED

The BEPC Feed is an exclusive online community for BEPC members. The Feed is akin to other social media platforms and is designed to offer members quick, simple access to fellow members, content, and opportunities to engage in discussions. [Learn More](#)

### BEPC'S LINKEDIN GROUP

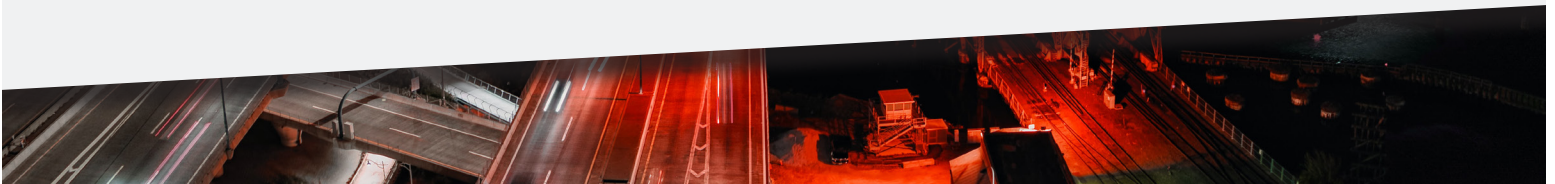
Members are invited to join BEPC's private LinkedIn Group. [Join Now](#)

### FORUMS

The Forums are designed to encourage collaboration and sharing of resources and expertise among the membership. Ask a question, share your experience, post a job, or offer referrals. Subscribe to the Forums for instant updates. [Learn More](#)

### MEMBER DIRECTORY

Searching for a fellow member? Looking to follow up with someone you met at an event? Use the Member Search, a members-only benefit. [Search Now](#)







## GET INVOLVED

### ATTEND BEPC EVENTS

BEPC hosts over 35 events annually. Events range from in-person to online, networking events to educational seminars, from small groups of 10 to large gatherings of 600, and everything in between. We're always looking for new event ideas, venues, and speakers. [Register to Attend](#)

### JOIN A COMMITTEE

May: Annual call for volunteers

June-July: Committees assembled

Year-round: A number of committees welcome new members throughout the year. If you are interested in joining a committee, contact the committee leadership directly to learn more.

To learn even more about BEPC committees, visit the [Member Resources](#) to view the archived "Committee Open House" webinar. A full listing of all committees is also available within this welcome packet (p. [6-21](#)).

## NONPROFIT PARTNERS



Every two years BEPC selects three nonprofit organizations from the Boston area as our Nonprofit Partners. The organizations represent our city's excellent programs in education, college access, workforce development, financial literacy, and entrepreneurship. We regularly feature opportunities to volunteer and become involved with our Nonprofit Partners in the Beacon. [Learn More](#)



**EMPath**  
 Economic Mobility Pathways



**MINDS MATTER**  
 BOSTON



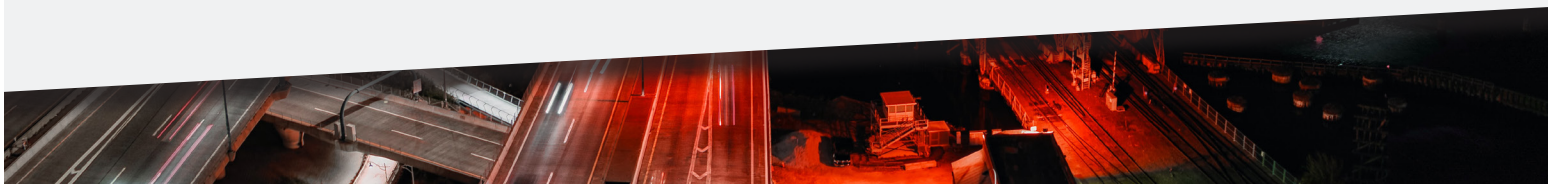
## SPONSORSHIP

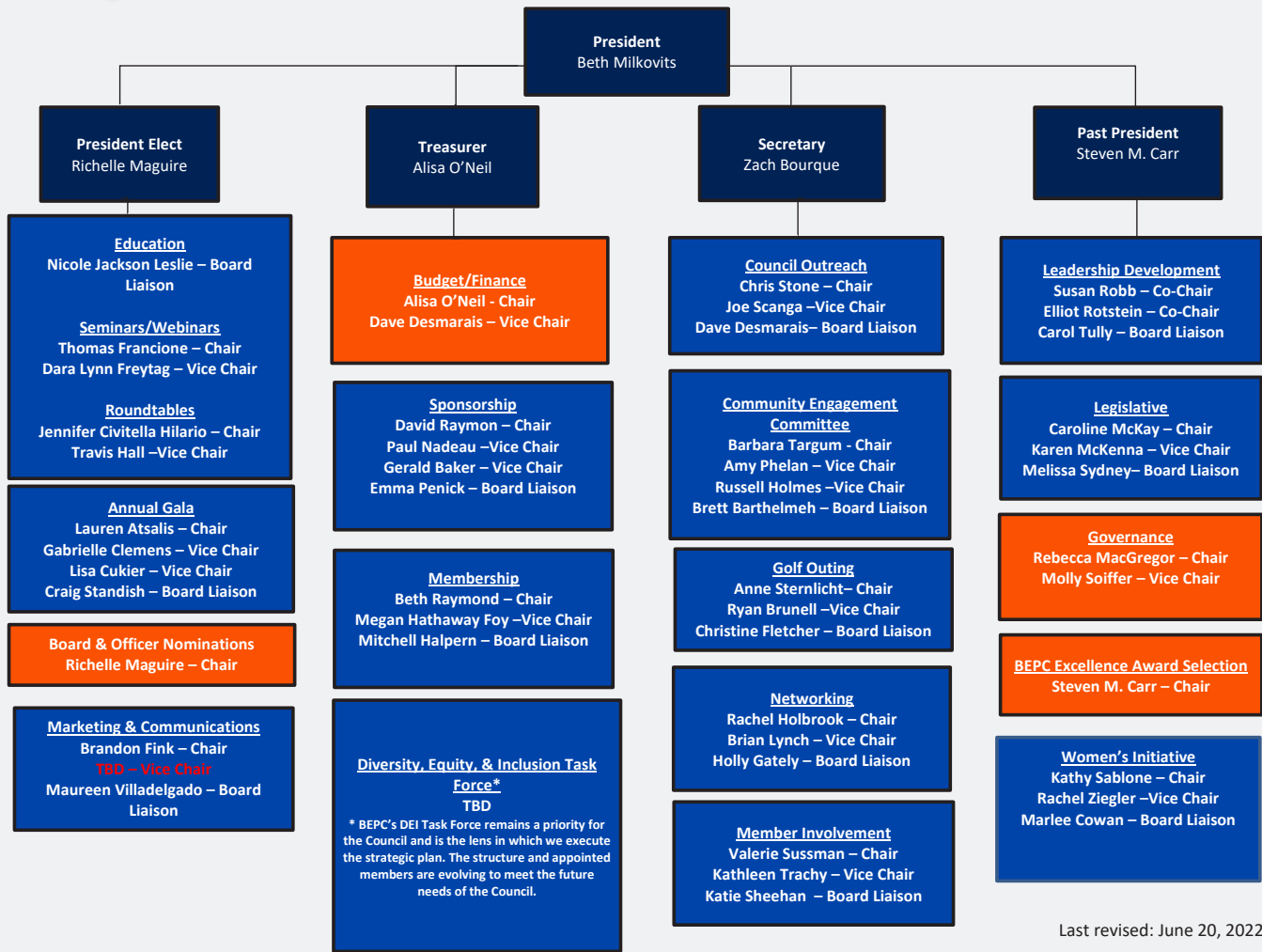
BEPC offers two types of sponsorship opportunities, Corporate Sponsorships and Annual Gala Sponsorships.

Corporate Sponsorships offer visibility throughout the year at events and through a variety of communication

channels. Add-ons for the annual golf outing are also available. [Sponsor BEPC](#)

Annual Gala Sponsorships are available for our premier social event honoring BEPC's Excellence Award recipient each May. [Sponsor the Annual Gala](#)





Last revised: June 20, 2022

**Board of Directors to 2025**

(ACCT) Mitchell Halpern  
 (WM) Nicole Jackson Leslie  
 (SC-PG) Emma Penick  
 (T&EL) Maureen Villadelgado

**Board of Directors to 2024**

(T&EL) Brett Barthelme  
 (T&EL) Marlee Cowan  
 (WM) Craig Standish  
 (TA) Katie Sheehan  
 (SC-RM) Holly Gately

**Board of Directors to 2023**

(T&EL) Melissa Sydney  
 (T&EL) Christine Fletcher  
 (ACCT) David Desmarais

**Key:**

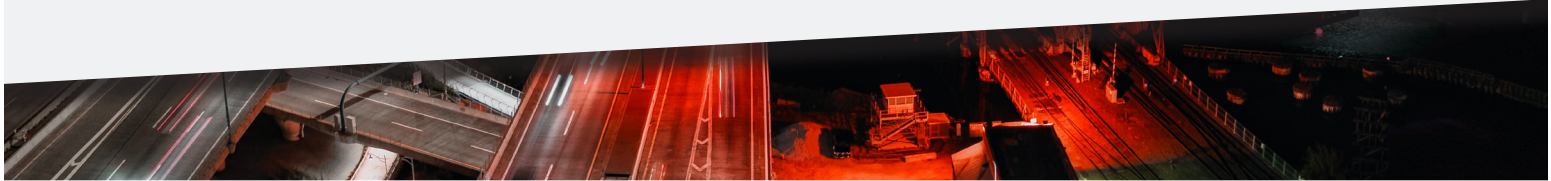
**ORANGE:** Committee is structured per the requirements set forth in the bylaws and/or the BEPC Operational Handbook.

**BLUE:** Committee is structured per the incoming President.

**Board of Directors to 2023  
 Honorary Director**

(ACCT) Carol Tully

Last revised: June 20, 2022



## ANNUAL GALA COMMITTEE

### PURPOSE AND GOALS

This Committee is responsible for the planning of the BEPC Annual Gala, the Council’s premier annual event, held each May. The Gala pays tribute to the recipients of the Excellence Award and the President’s Award; announces the current year’s AEP® designees; and also introduces the change of BEPC leadership from the current President to the President Elect.

The Annual Gala Committee plans and organizes the entire evening in close coordination with the BEPC staff.

#### Key Responsibilities:

- Date for future years’ event (based on the assigned timeframe on the BEPC Events Calendar)
- Venue selection for future years’ events from those researched and recommended by BEPC Staff
- Emcee/Moderator selection, to be selected soon after prior year’s event
- Agenda and timeline
- Menu choice
- Determine centerpieces
- Award winner video, process to be determined in part by support provided by award winner:
  - Conduct interviews of up to five representatives (family, friends and colleagues) for use in the award recipient video
  - Coordinate and determine content for video
- Hold a face-to-face walk through with all speakers to rehearse the speeches
- Chairs to review seating assignments and to only make truly necessary adjustments
- Every few years, determine if new physical awards need to be sourced
- Coordinate with Sponsorship Committee to help determine sponsorship benefits and packages
- Review feedback collected through post-event Gala survey

#### Leadership:

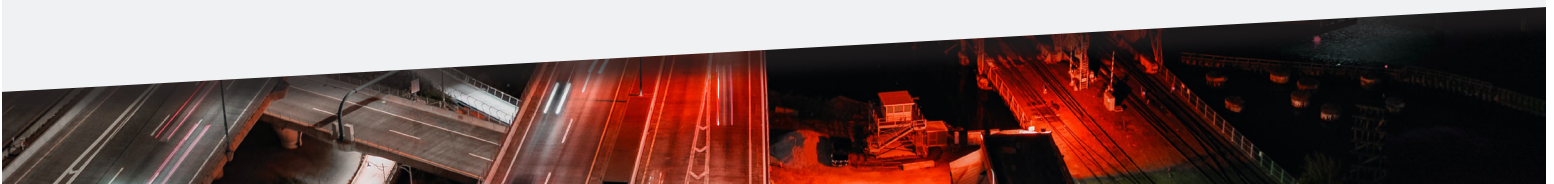
Chair: Lauren Atsalis

Vice Chair: Gabrielle Clemens

Vice Chair: Lisa Cukier

Board Liaison: Craig Standish

[Connect with the committee leadership using BEPC’s Member Directory](#)



## COMMUNITY ENGAGEMENT COMMITTEE

### PURPOSE AND GOALS

Members of the estate planning community are united by professional expertise and commitment to client service. The primary goal of the Community Engagement Committee (formerly known as the Public & Community Outreach Committee) is to encourage BEPC members to further unite by aligning that expertise with a commitment to give back to the local community at-large, by (1) supporting nonprofits that work in the areas of education, college access, financial literacy, entrepreneurship, and workforce development, and (2) working with clients to enhance their strategic charitable giving within their estate plan. The primary avenue by which this Committee pursues its goal is to identify three Nonprofit Partners for a two-year cycle of deeper, aligned engagement with BEPC members. BEPC's Nonprofit Partners are nominated by BEPC members, vetted by the Committee, and selected by vote of the BEPC membership.

#### Key Responsibilities:

Responsible for determining all charitable components that BEPC will support and/or participate including:

- Nonprofit partnership program. BEPC members identify three nonprofits in the areas of education, college access, financial literacy and/or entrepreneurship for participation a 2-year cycle of engagement with BEPC.
- Nonprofit partners nomination and selection process conducted every 2 years.
- Oversight of a dedicated Community Engagement page on the BEPC public website.
- Holiday Support Initiatives.
- Each Fall the committee will organize an educational event focused on philanthropy. The event also provides an opportunity to showcase the Nonprofit Partners.
  - Date for event (based on the assigned timeframe on the BEPC Events Calendar)
  - Venue selection from those researched and recommended by BEPC staff
  - Manage event budget
  - Coordinate with the Nonprofit Partners for their participation
  - Determine format for event and relay information to BEPC staff so that they may verify the following:
    - Venue set-up
    - Audio-Visual requirements

#### Leadership:

Chair: Barbara Targum

Vice Chair: Amy Phelan

Vice Chair: Russell Holmes

Board Liaison: Brett Bathelmeh

[Connect with the committee leadership using BEPC's Member Directory](#)



## COUNCIL OUTREACH COMMITTEE

### PURPOSE AND GOALS

The Council Outreach Committee (formerly known as the NAEPC/AEP® Committee) focuses on:

- Raising awareness of BEPC's membership in NAEPC and the benefits NAEPC offers BEPC members;
- Seeking AEP® designee nominations of BEPC members from our general membership and the Board of Directors as part of a formal yearly process, reviewing nominees and selecting members to nominate to NAEPC to receive the AEP® designation using a specific criteria adopted by the Council;
- Finding ways to connect with other Councils around the country as well as regionally.

### Key Responsibilities:

- Identify members to nominate for the AEP® designation on behalf of BEPC. Manage the application process for those nominated.
- Manage, moderate and participate in the NAEPC Monthly Conference Call series with other Extra-Large Councils.
- Coordinate the application for the NAEPC Council of Excellence Award. The application is available in March and due to NAEPC in early May.
- Provide content as required for the NAEPC tab on the BEPC website. NAEPC's Annual Conference, events, and webinars are featured in the BEACON
- Coordinate and lead annual AEP® information session meeting.

### Leadership:

Chair: Christian Stone

Vice Chair: Joe Scanga

Board Liaison: Dave Desmarais

[Connect with the committee leadership using BEPC's Member Directory](#)





## EDUCATION COMMITTEE

### PURPOSE AND GOALS

The Education Committee oversees the programming produced by the Seminars/Webinars and the Roundtables Committees. The committee also consults on educational programming organized by the Women's Initiative Committee, Networking Committee, Sponsorship Committee (platinum sponsor webinar), and Community Engagement Committee to avoid duplication of topics.

The Education Committee also oversees BEPC's education track and level classification system.

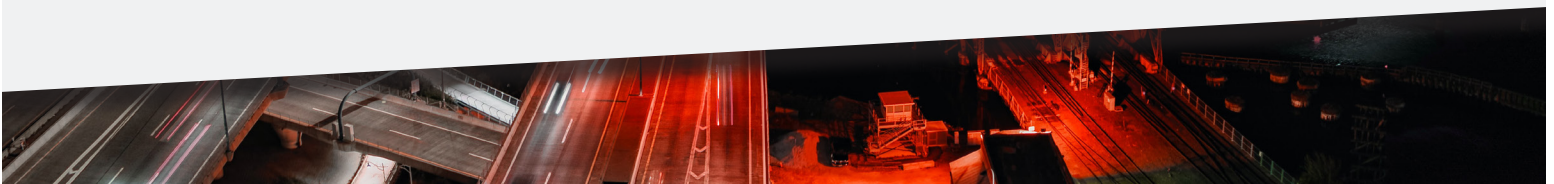
The committee is responsible for producing a foundations webinar series. The quantity, schedule, and topics are determined in collaboration with the BEPC officers and Budget/Finance Committee.

Finally, the committee may also be involved with the Marketing and Communications Committee to develop new content ideas and creative ways to bring content to the membership, such as podcasts and webinars.

### Leadership:

Board Liaison: Nicole Jackson Leslie

[Connect with the committee leadership using BEPC's Member Directory](#)



## GOLF OUTING COMMITTEE

### PURPOSE AND GOALS

The Golf Outing Committee organizes all the logistics for the annual summer golf tournament to be held in July. This includes coordination of the entire golf event followed by a social networking gathering. The Committee plans and organizes the event in close coordination with the BEPC staff.

#### Key Responsibilities:

- Date for event
- Venue selection from those researched and recommended by BEPC Staff
- Format of play and prizes
- Event agenda, including networking reception
- Recruiting members and guests to attend the event
- Coordinate with Sponsorship Committee to help determine additional sponsorship benefits available to Corporate Sponsors, if any

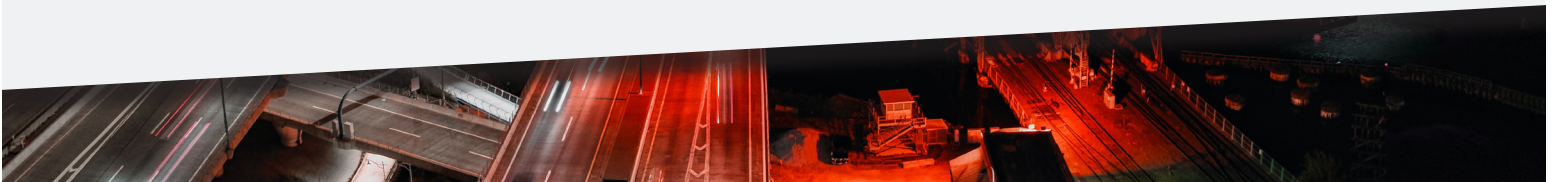
#### Leadership:

Chair: Anne Sternlicht

Vice Chair: Ryan Brunell

Board Liaison: Christine Fletcher

[Connect with the committee leadership using BEPC's Member Directory](#)



## LEADERSHIP DEVELOPMENT COMMITTEE

### PURPOSE AND GOALS

The Leadership Development Committee was created to memorialize and maintain the expectations and responsibilities of the officers and board members. This information is to be made available to BEPC members that are interested in leadership positions. Information includes, but is not limited to, the numbers of meetings and phone calls, estimated hours required, and committee oversight responsibilities. The committee will also provide insight to BEPC members as to the paths that are available should a member be interested in a leadership position. The Committee will be responsible for maintaining the "Rising Star" list used during the officer and board nomination process. This list contains the names of members that have been considered for leadership positions either by self or peer nomination. The Committee will also profile distinguished BEPC leaders and the path they have taken on their personal BEPC journey. The profiles are meant to provide members with insight as to how each BEPC leader achieved success and how that information may lead to their own BEPC leadership role.

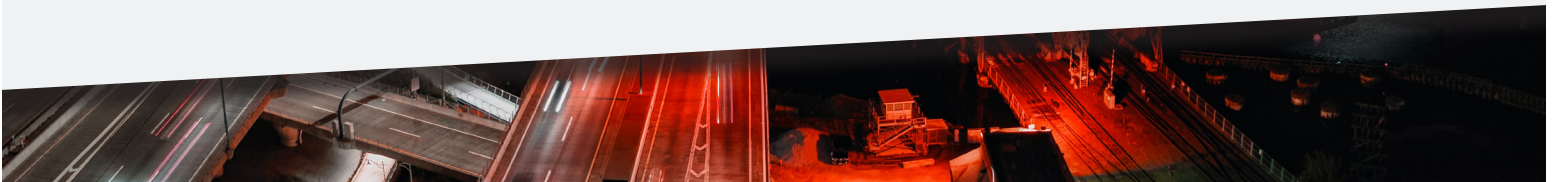
#### **Leadership:**

Co-Chair: Susan Robb

Co-Chair: Elliot Rotstein

Board Liaison: Carol Tully

[Connect with the committee leadership using BEPC's Member Directory](#)



## LEGISLATIVE COMMITTEE

### PURPOSE AND GOALS

The Legislative Committee reviews and reports on proposed Massachusetts legislation pertaining to estate planning. For this purpose, estate planning also encompasses financial planning, estate, and trust administration, wealth management and insurance services.

#### Key Responsibilities

- The Committee will prepare an annual report attaching a copy of proposed bills affecting estate planning with a summary of each Bill, and interim reports as needed. The Legislative Committee will submit the report to the Board and review the report at a meeting of the Board.
- The Legislative Committee, as part of its report and meeting with the Board, may recommend Bill(s) which the Committee believes the Boston Estate Planning Council should consider formally supporting or opposing. For any Bill which the Committee recommends formally supporting or opposing, the Committee will include the basis for its recommendation to the Board.
- The Legislative Committee will request the Board's approval to seek comment regarding any Bill which the Committee recommends formally supporting or opposing. With the Board's approval, the bill would be circulated to all Officers, Board Members, committee chairs, and committee vice-chairs with a deadline for comment. The Committee will compile all comments and submit them to the Board for discussion and a vote on whether to support the bill.
- The Legislative Committee will coordinate its activities with other professional associations as are relevant to the proposed Bill such as the Boston Bar Association, Massachusetts Bar Association, Massachusetts Bankers Association, Massachusetts chapter of National Academy of Elder Law Attorneys and other related professional associations.
- If the Board votes to support or oppose a Bill, the Legislative Committee will coordinate with such other professional associations to convey such support or opposition to the Legislature. Additionally, the Committee will prepare notices for the membership regarding the status of the Bill and regarding available action items for individual members.

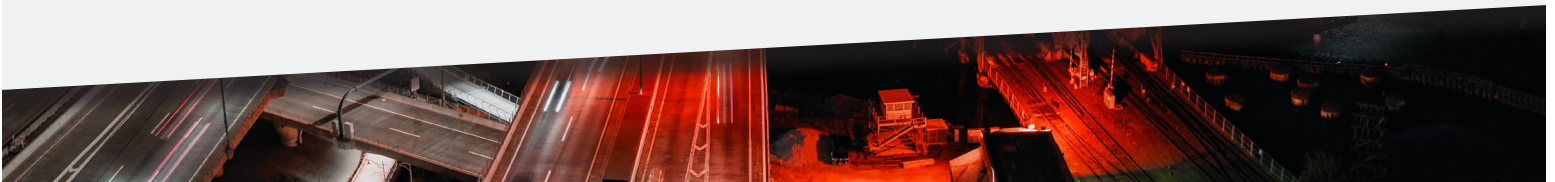
#### Leadership:

Chair: Caroline McKay

Vice Chair: Karen McKenna

Board Liaison: Melissa Sydney

[Connect with the committee leadership using BEPC's Member Directory](#)





## MARKETING AND COMMUNICATIONS COMMITTEE

### PURPOSE AND GOALS

The Marketing & Communications Committee oversees all aspects related to internal and external communications for the Council.

#### Key Responsibilities:

- Advise BEPC Staff on the content for the monthly BEPC BEACON e-newsletter
- Determine scope of key activities for a Marketing Consultant (if needed)
- Oversight of BEPC public website content and social media content
- In coordination with BEPC Staff, continue to evolve the usage of the Members' Only online platform, YourMembership
- Work in collaboration with the Marketing Services contractor to create a comprehensive marketing and PR plan to ensure that all communication efforts are aligned in support of the BEPC Strategic Plan including:
  - Email Communications
  - Print collateral
  - Social Media Plan
  - Web presence
  - Press activities

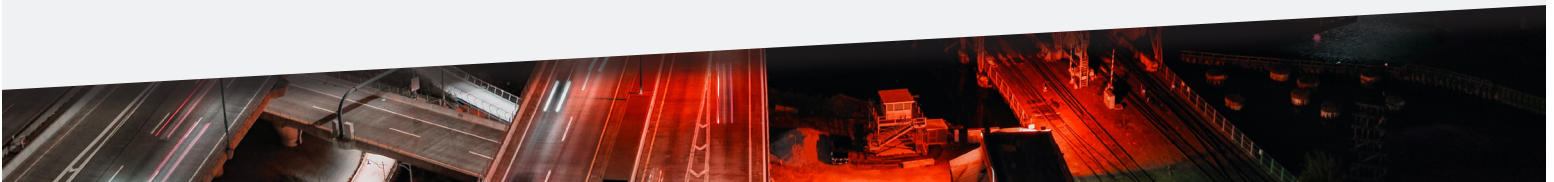
#### Leadership:

Chair: Brandon Fink

Vice Chair: TBD

Board Liaison: Maureen Villadelgado

[Connect with the committee leadership using BEPC's Member Directory](#)



## MEMBER INVOLVEMENT COMMITTEE

### PURPOSE AND GOALS

BEPC has commissioned a Member Involvement Committee to communicate on a regular basis with both new members and existing members to encourage their active involvement in the activities of the Council.

#### Key Responsibilities:

- Management of the Ambassador program with the goal to ensure that new members feel both welcome to and informed about BEPC member benefits, resources and events.
- Advising all members so that they know how they can be engaged in the activities of the Council, that any member who wishes to be on a Committee is given an opportunity to participate, and that the tools the Council uses to gauge member satisfaction are informative and effective.
- Each month when new members are approved by the Board of Directors, the Committee sends out a personalized new member welcome note that includes a message from the BEPC President.
- Committee members to welcome new members attending BEPC events. These members are identified via a New Member ribbon.
- Responsible for coordinating any Member Surveys.
- Coordinate new member gatherings prior to the annual Kick-off Networking Reception and Holiday Networking Reception.
- The Committee may also receive approval and a budget allocation to host a committee open house event in April.

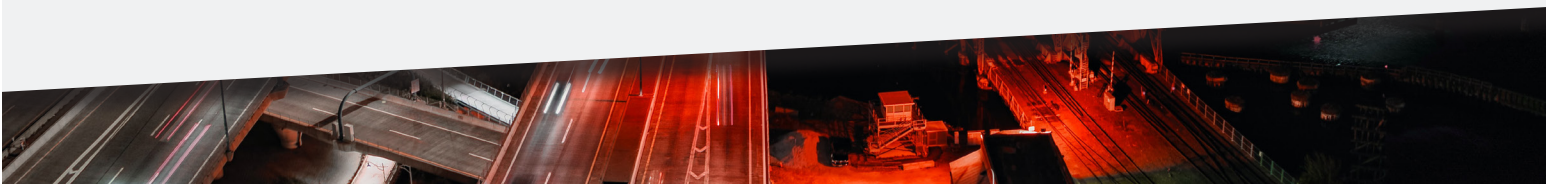
#### Leadership:

Chair: Valerie Sussman

Vice Chair: Kathleen Trachy

Board Liaison: Katie Sheehan

[Connect with the committee leadership using BEPC's Member Directory](#)



## MEMBERSHIP COMMITTEE

### PURPOSE AND GOALS

The primary responsibility of the Membership Committee is to increase and enhance the membership of the Boston Estate Planning Council by attracting new members who meet the Council's qualifications, and to assist prospective members through the membership process. The Membership Committee is tasked with recruiting new members for the organization, assisting prospective members through the application process, assisting lapsed members to renew their membership, creating and implementing strategies to grow membership in specific target practice areas, and maintaining a level of BEPC membership necessary to ensure the fiscal stability of the organization. The Membership Committee from time to time also develops new guidelines for membership and assists other committees in maintaining the membership of the Boston Estate Planning Council.

#### **Key Responsibilities:**

##### *New Members*

- Review submitted materials of prospective members to ensure they meet all the required criteria established for membership
- On a monthly basis, provide BEPC Staff with the names of the prospective members that have been fully vetted and approved by the Committee to be presented to the Board of Directors for approval
- Provide more information to the Board, as needed, on specific requirements for membership
- Establish new ways to attract new members to join the Council, including outreach to nonmember attendees at BEPC events including Gala and Golf

##### *Lapsed Members*

- Review list of lapsed members provided by BEPC Staff on a monthly basis. The data is on a rolling six-months.
- Committee is responsible for outreach to the lapsed members to encourage renewal.
- Committee members should be assigned list of lapsed members to contact either by email or to call directly. Member-to-member outreach has been determined to be most effective.

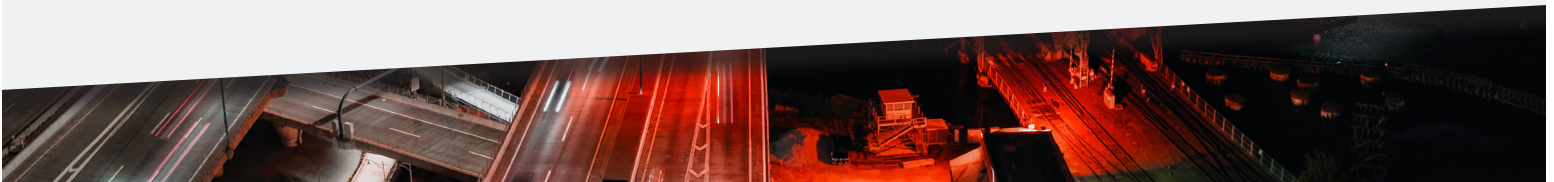
#### **Leadership:**

Chair: Beth Raymond

Vice Chair: Megan Hathaway Foy

Board Liaison: Mitchell Halpern

[Connect with the committee leadership using BEPC's Member Directory](#)



## NETWORKING COMMITTEE

### PURPOSE AND GOALS

The primary purpose of the Networking Committee is to plan and facilitate events at which members can meet each other in a casual atmosphere to network with other members of the BEPC. The Networking Committee is responsible for organizing several social events throughout the year. Some of these events are for members only and sometimes members are encouraged to invite potential new members. This allows current members to meet new estate planning professionals while potentially growing the membership of the BEPC. The Committee strives to create new and fun ways to provide networking opportunities among the greater membership.

#### **Key Responsibilities:**

- Date for event (based on the assigned timeframe on the BEPC Events Calendar)
- Venue selection from those researched and recommended by BEPC staff
- Identify “theme” for events
- Manage event budget
- Determine format for event and relay information to BEPC staff so that they may verify the following:
  - Venue set-up
  - Audiovisual requirements

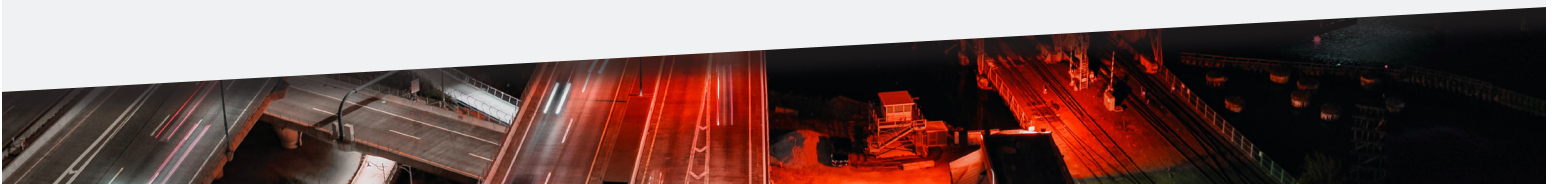
#### **Leadership:**

Chair: Rachel Holbrook

Vice Chair: Brian Lynch

Board Liaison: Holly Gately

[Connect with the committee leadership using BEPC’s Member Directory](#)





## ROUNDTABLE COMMITTEE

### PURPOSE AND GOALS

The Member Roundtable Committee is responsible for establishing three educational roundtable events throughout the year. These events are exclusively for members of the Council, and consist of five tables or virtual rooms that accommodate up to 20 members each, with each table having a separate topic of discussion led by an expert(s).

#### Key Responsibilities:

- The Committee selects topics and moderators (5 per event)
- Responsible for receiving topic descriptions and bios from each moderator
- Date for event (based on the assigned timeframe on the BEPC Events Calendar)
- Venue selection from those researched and recommended by BEPC staff.
- Arrange for topics and moderator suggestions to be submitted by BEPC members as well as by the Committee members.
- CFP Credit Hours – Staff applies for continuing education hours through the Certified Financial Planning Board.

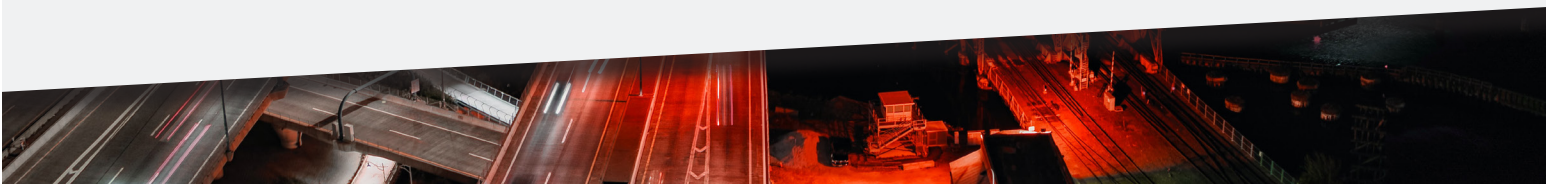
#### Leadership:

Chair: Jennifer Civitella Hillario

Vice Chair: Travis Hall

Board Liaison: Nicole Jackson Leslie

[Connect with the committee leadership using BEPC's Member Directory](#)



## SEMINARS/WEBINARS COMMITTEE

### PURPOSE AND GOALS

The Seminars/Webinars Committee is responsible for establishing three to four educational seminar events on a wide range of themes in order to appeal across the spectrum of BEPC members. The Educational Seminar topics should be primarily technical, with practice development topics also offered. The committee may also produce up to three Webinars annually. One of the three webinars is an annual update following the Heckerling Institute on Estate Planning, providing a debrief of the topics discussed at the event. The remaining two webinars are targeted to breaking developments in the law or disciplines associated with estate planning. These webinars are offered as needed. To be able to engage high-caliber speakers for the Seminars, the Committee should schedule events sufficiently far in advance, in accordance with the event.

The committee is responsible for producing a foundations webinar series. The quantity, schedule, and topics are determined in collaboration with the BEPC officers and Budget/Finance Committee.

#### Key Responsibilities:

- Date for events
- Venue selection from those researched and recommended by BEPC staff
- The Committee selects topics and speakers
- Responsible for the following:
  - Topic and title
  - Bios from speakers
  - Description of session
- Identify a moderator from the Committee
- Conduct pre-event/pre-webinar conference call with speakers to determine the content is sufficient and to set expectations for the event
- For Webinar, it includes an overview of the GoToWebinar system with all involved.
- Manage event budget including speaker fees, travel and lodging expenses
- Determine format for event and relay information to BEPC staff so that they may verify the following:
  - Venue set-up
  - Audio-Visual requirements
  - Printed materials
- Identify track category and track level for the educational content
- Identify Seminar as either technical or professional development focused
- CFP Credit Hours – Staff applies for continuing education hours through the Certified Financial Planning Board. In order to do so, the Committee must provide the information required for the submission (if additional to what is part of the Event Initiation Form).
- In the event BEPC is awarded a free speaker as a result of an award from NAEPC the committee will ensure programming is arranged prior to the end of the fiscal year.

#### Leadership:

Chair: Thomas Francione

Vice Chair: Dara Lynn Freytag

Board Liaison: Nicole Jackson Leslie

[Connect with the committee leadership using BEPC's Member Directory](#)



## SPONSORSHIP COMMITTEE

### PURPOSE AND GOALS

The Committee is responsible for oversight of obtaining sponsors for both the Corporate and Annual Gala Sponsorship Programs while ensuring that sponsors receive as much value from their sponsorship dollars as possible.

#### Key Responsibilities:

- Solicit and retain sponsors to meet annual budget.
- BEPC staff to survey sponsors and Committee to appoint sponsors to events.
- Collaborate with BEPC staff and the Officers to assign speaking opportunities accordingly for sponsors at events.
- Work with BEPC staff on sponsor benefits tracking and sponsor kit.
- Maintain positive relationships with sponsors.
- Committee members serves as the main contact for two to three sponsors throughout the year.
- Create and update the various sponsorship opportunities and benefits in collaboration with BEPC staff.
- Work with BEPC Staff on the sponsorship prospectus guidebooks for both Corporate and Annual Gala sponsor programs which is a tool for the sales process.
- Recommend pricing or adjustments to prices to Budget/Finance Committee and Officers as part of the annual budgeting process.

#### Leadership:

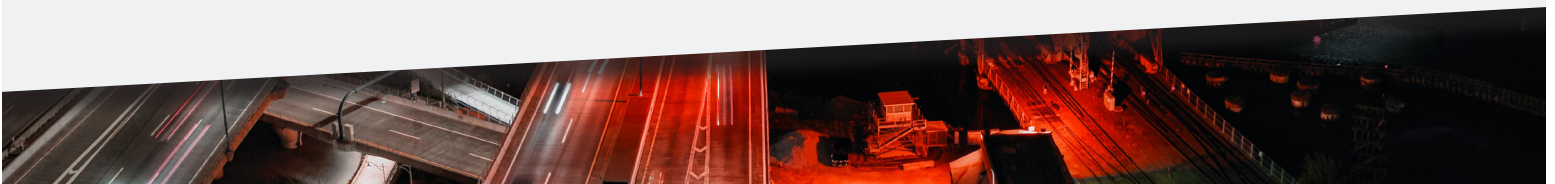
Chair: David Raymon

Vice Chair: Paul Nadeau

Vice Chair: Gerald Baker

Board Liaison: Emma Penick

[Connect with the committee leadership using BEPC's Member Directory](#)



## WOMEN'S INITIATIVE (WIC) COMMITTEE

### PURPOSE AND GOALS

The Committee is committed to discussing topics of interest to women in the estate planning profession and providing a support structure to advance women's issues. The Committee is very active and holds several events during the year where women have an opportunity to network with BEPC members in an effort to generate business and create referral relationships. The Committee also seeks to form partnerships with other outside professional groups committed to advancing women's issues.

The Women's Initiative Committee (WIC) is led by BEPC professionals interested in supporting the advancement of women in the estate planning community. WIC is empowered to provide networking opportunities and educational programs focused on issues of particular relevance to women professionals, as well as valuable programming for those who seek to retain talented women professionals and attract women clients. WIC's goal is to foster transparency, mentorship and support, awareness, collaboration, and communication among BEPC members about these issues. Examples of these programs include: behavioral finance, philanthropy, family dynamics, interpersonal skills that impact practice management, diversity of thought in the workplace, career management, mentoring, etc.

### Key Responsibilities:

- Management of three events (one Education Event, one Networking Event, and a third that is either educational or networking focused)
  - Date for event
  - Venue selection from those researched and recommended by BEPC staff
  - Select speaker(s), determine topic and title
  - Manage event budget
  - Determine format for event and relay information to BEPC staff so that they may verify the following:
    - Venue set-up
    - Audio-Visual requirements
- CFP Credit Hours – Staff applies for continuing education hours through the Certified Financial Planning Board for relevant education events.

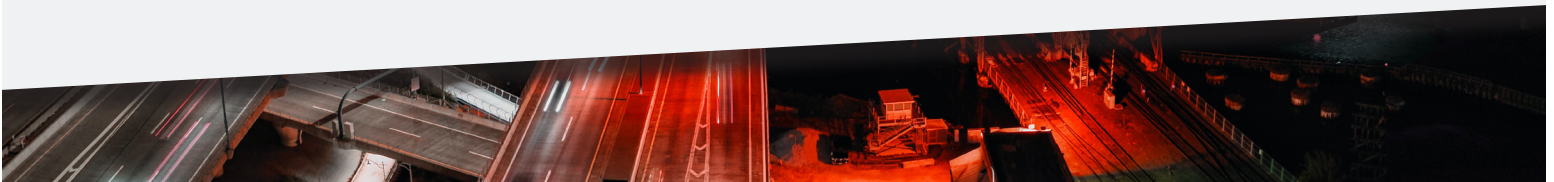
### Leadership:

Chair: Kathy Sablone

Vice Chair: Rachel Ziegler

Board Liaison: Marlee Cowan

[Connect with the committee leadership using BEPC's Member Directory](#)





## ADDITIONAL COMMITTEES AND TASK FORCES

The Boston Estate Planning Council utilizes a number of committees related to governance, strategic initiatives, financial oversight, and its awards program. The composition of these bodies is often determined by the Council's governing documents or are appointed by the incoming president each year.

### BEPC EXCELLENCE AWARD SELECTION COMMITTEE

Leadership:

Chair and Board Liaison      Steven M. Carr

### BOARD NOMINATIONS COMMITTEE

Leadership:

Chair and Board Liaison      Richelle Maguire

### BUDGET/FINANCE COMMITTEE

Leadership:

Chair and Board Liaison      Alisa Kim O'Neil

Vice Chair      Dave Desmarais

### DIVERSITY, EQUITY, AND INCLUSION (DEI) TASK FORCE

BEPC's DEI Task Force remains a priority for the Council and is the lens in which we execute BEPC Tomorrow, the council's strategic plan. The structure and appointed members are evolving to meet the future needs of the Council. Updates to be announced in FY22.

### GOVERNANCE COMMITTEE

Leadership:

Chair      Rebecca MacGregor

Vice Chair      Molly Soiffer

Board Liaison      Steven M. Carr

### OFFICER NOMINATIONS COMMITTEE

Leadership:

Chair and Board Liaison      Richelle Maguire

[Connect with the committee leadership using BEPC's Member Directory](#)



# QUESTIONS?

CONTACT OUR OFFICE AT  
[BEPC@BEPC.ORG](mailto:BEPC@BEPC.ORG) OR 978-364-5170

