

2019-2020

B E P C

B O S T O N  
ESTATE PLANNING COUNCIL

*WELCOME  
PACKET*





I am thrilled to be named the 89th President of the Boston Estate Planning Council. When I joined BEPC 15 years ago, I did so because I wanted to build a network. As a new T&E lawyer, I did not have people outside my firm to call with questions, send referrals or develop business. Over the years, the members of BEPC have become “my people.” And while the knowledge and business I have gained from my BEPC involvement have been significant, it has been the relationships I have developed with other members that are truly the most treasured.

Thank you to my fellow Officers, the Board and the many volunteers for your time and dedication to this amazing organization. BEPC grows stronger each year because of the ongoing commitment of its members. For those members who would like to be more involved, please feel free to reach out to me, the Member Involvement Committee or any other BEPC leader for more information.

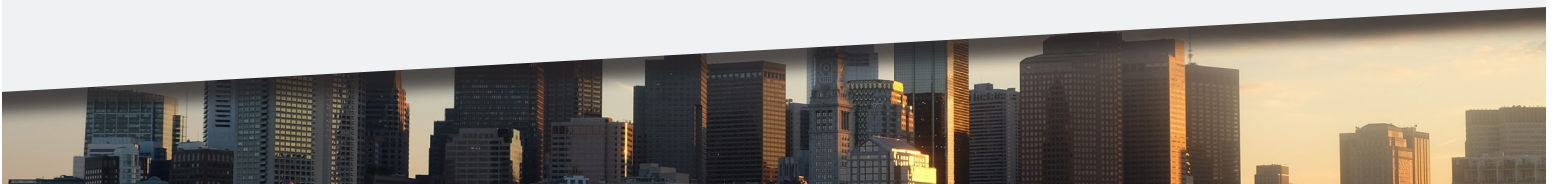
For those interested in volunteering, each May, BEPC sends a “Call for Volunteers” email out to the BEPC membership. In this communication, we invite our members to submit their top five BEPC committee selections. In June, our officers, board of directors, and committee leaders meet at which time our committee leaders are provided with the names of our members who replied to the “Call for Volunteers” email. Committee leaders will then reach out to interested members to form their respective committees.

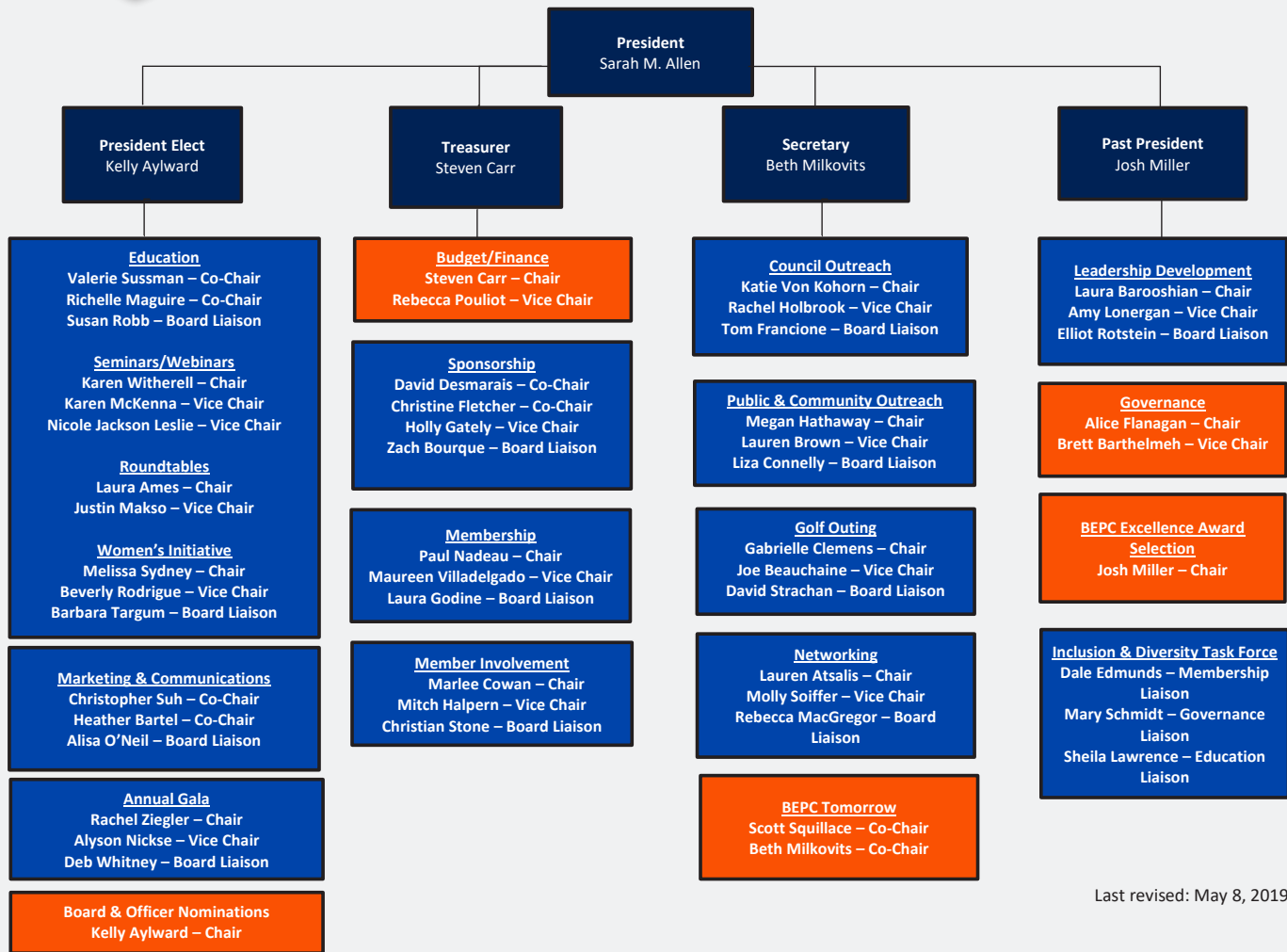
I look forward to seeing all of you at future BEPC events.

We invite you to utilize the members-only online directory to connect with fellow members. Please note the directory lists the most up-to-date contact information for BEPC members.

Sarah M. Allen

President, Boston Estate Planning Council





Last revised: May 8, 2019

**Board of Directors to 2022**

(WM) Zach Bourque  
 (SC-RM) Barbara Targum  
 (WM) Christian Stone  
 (TA) Tom Francione

**Board of Directors to 2021**

(SC-RM) Elliot Rotstein  
 (TA) Susan Robb  
 (TA) David Strachan  
 (WM) Deb Whitney

**Board of Directors to 2020**

(WM) Laura Godine  
 (WM) Alisa O'Neil  
 (T&EL) Rebecca MacGregor  
 (TA) Liza Connelly

**Key:**

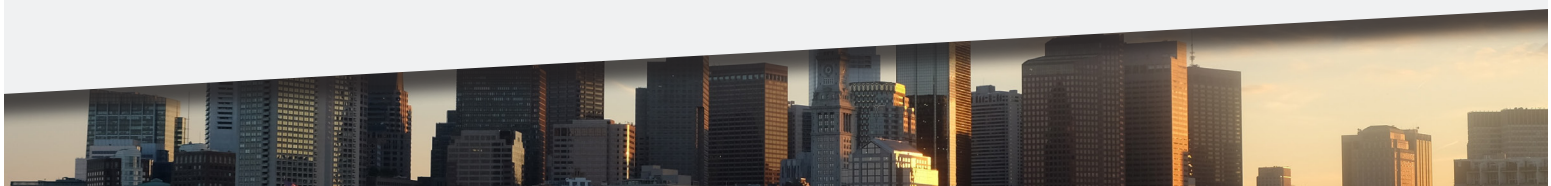
**ORANGE:** Committee is structured per the requirements set forth in the bylaws and/or the BEPC Operational Handbook.

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

**Board of Directors to 2020  
 Honorary Director**

(T&EL) Eric Hayes

Last revised: May 8, 2019





## 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, preferably on the Wednesday prior to the Memorial Day holiday. 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.

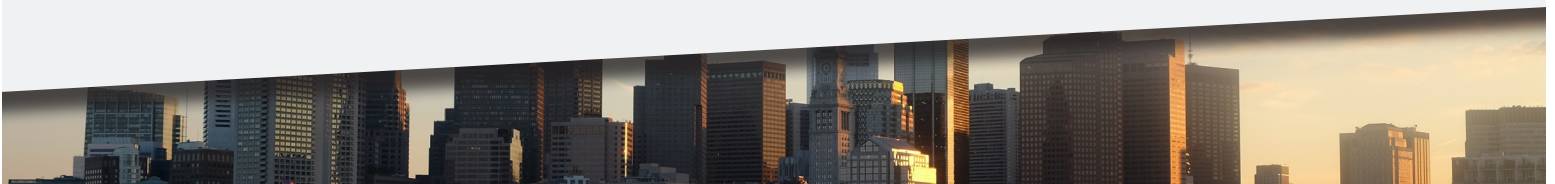
The Annual Gala Committee plans and organizes the entire evening in close coordination with the BEPC staff.

#### Key Responsibilities:

- Date for event (based on the assigned timeframe on the BEPC Events Calendar)
- Venue selection from those researched and recommended by BEPC Staff
- Emcee/Moderator selection
- Agenda and timeline
- Menu choice
- Determine centerpieces
- 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:

Board Liaison	Deb Whitney	<a href="mailto:dwhitney@ballantinepartners.com">dwhitney@ballantinepartners.com</a>
Chair	Rachel Ziegler	<a href="mailto:rachel@kaiserlawgroup.com">rachel@kaiserlawgroup.com</a>
Vice Chair	Alyson Nickse	<a href="mailto:anickse@crestwoodadvisors.com">anickse@crestwoodadvisors.com</a>



## 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:

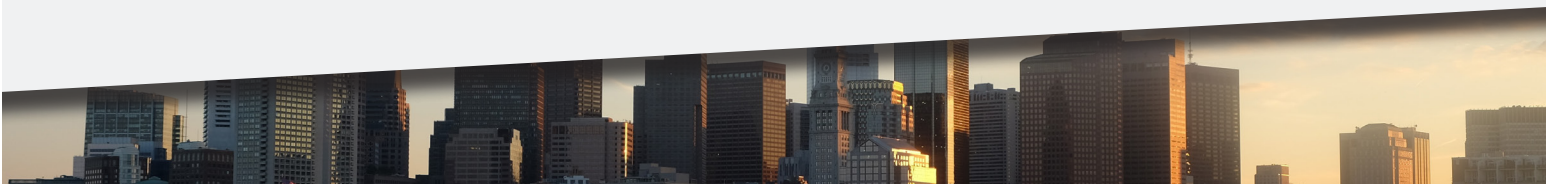
- Identify members to nominate for the AEP® designation on behalf of BEPC. Manage the application process for those nominated.
- Manage, moderate and participate in the Monthly Conference Call series with other Extra-Large Councils.
- Coordinate the application for the NAEPC Council of Excellence Award. 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:

Board Liaison  
Chair  
Vice Chair

Tom Francione  
Katie Von Kohorn  
Rachel Holbrook

[tfrancione@lwcotrust.com](mailto:tfrancione@lwcotrust.com)  
[VonKohorn@casneredwards.com](mailto:VonKohorn@casneredwards.com)  
[rachel.holbrook@ubs.com](mailto:rachel.holbrook@ubs.com)



## 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.

#### Key Responsibilities:

- Date for event (based on the assigned timeframe on events calendar in Appendix I)
- 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:

Board Liaison

David Strachan

[David.Strachan@cambridgetrust.com](mailto:David.Strachan@cambridgetrust.com)

Chair

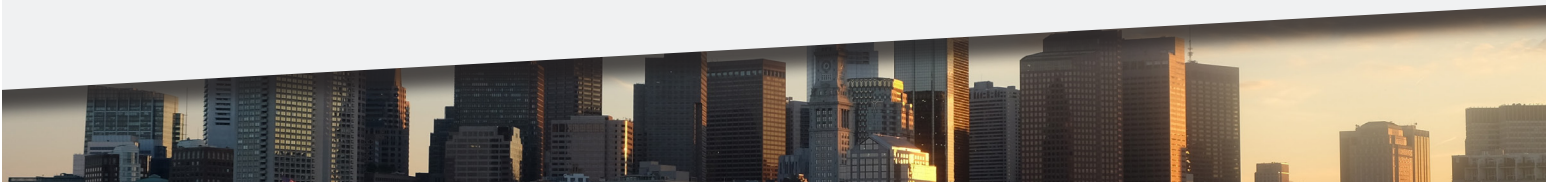
Gabrielle Clemens

[gabrielle.clemens@rbc.com](mailto:gabrielle.clemens@rbc.com)

Vice Chair

Joe Beauchaine

[joseph.beauchaine@cibc.com](mailto:joseph.beauchaine@cibc.com)



## 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:

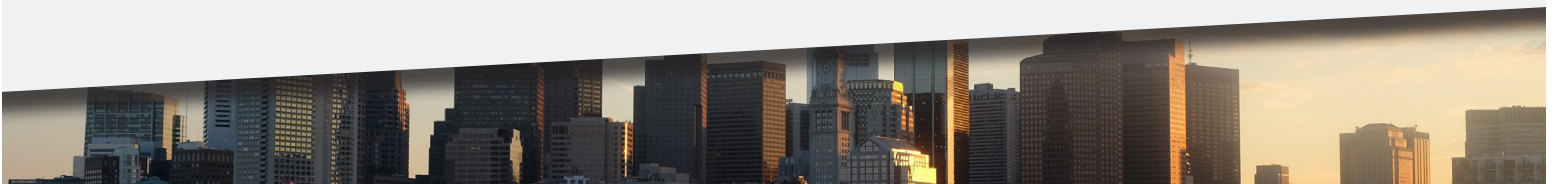
- Advise BEPC Staff on the content for the monthly BEPC BEACON e-newsletter
- Determine scope of key activities for a Marketing Consultant (if needed)
- Oversight of BEPC public website content
- In coordination with BEPC Staff, continue to evolve the usage of the Members' Only online platform, YourMembership
- 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:

Board Liaison  
Co-Chair  
Co-Chair

Alisa O'Neil  
Chris Suh  
Heather Bartel

[AlisaO@BFMinvest.com](mailto:AlisaO@BFMinvest.com)  
[christopher.suh@schmidt-federico.com](mailto:christopher.suh@schmidt-federico.com)  
[heather@squillace-law.com](mailto:heather@squillace-law.com)



## MEMBER INVOLVEMENT COMMITTEE

### PURPOSE AND GOALS

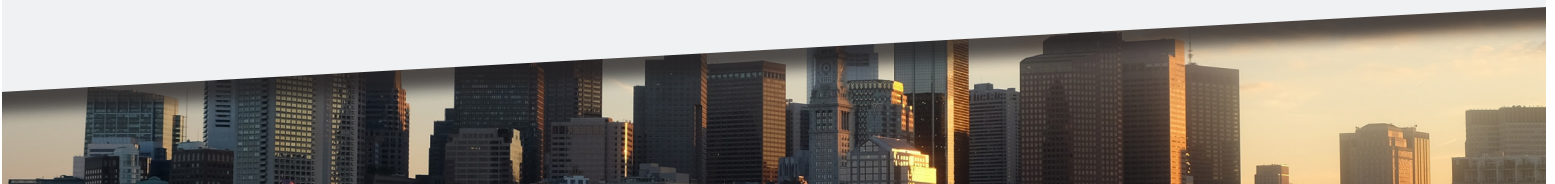
BEPC has commissioned a Member Involvement Committee to communicate on a regular basis with both new members and existing members to encourage their active involvement in the activities of the Council.

#### 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 Member Involvement Committee sends a letter on behalf of the BEPC President to new members welcoming them to BEPC.
- 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 annual Kick-off event and Holiday party.

#### Leadership:

Board Liaison	Christian Stone	<a href="mailto:Christian.Stone@cambridgetrust.com">Christian.Stone@cambridgetrust.com</a>
Chair	Marlee Cowan	<a href="mailto:mcowan@pabianrussell.com">mcowan@pabianrussell.com</a>
Vice Chair	Mitchell Halpern	<a href="mailto:mhalpern@kahnlitwin.com">mhalpern@kahnlitwin.com</a>





## MEMBERSHIP COMMITTEE

### PURPOSE AND GOALS

The primary responsibility of the Membership Committee is to increase 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. A detailed document outlining the Membership Committee’s standard operating procedures is available via the Membership Committee portal on the BEPC website.

#### Key Responsibilities:

##### *New Members*

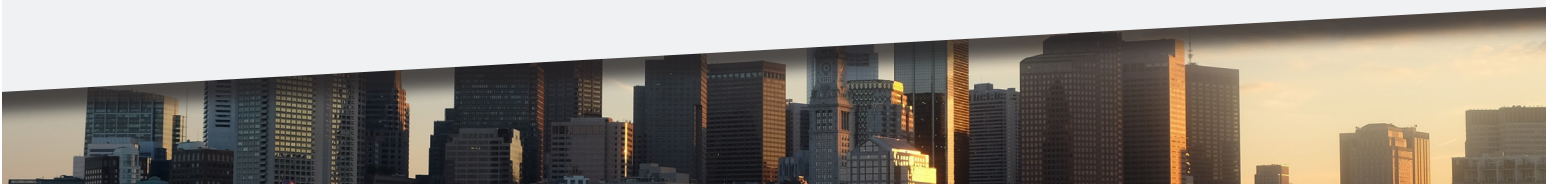
- Review submitted materials of prospective members to ensure they meet all the required criteria established for membership
- On a monthly basis, provide BEPC Staff with the names of the prospective members that have been fully vetted and approved by the Committee to be presented to the Board of Directors 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 weekly basis. The data is a rolling 12-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:

Board Liaison	Laura Godine	<a href="mailto:LGodine@EatonVance.Com">LGodine@EatonVance.Com</a>
Chair	Paul Nadeau	<a href="mailto:pnadeau@kahnlitwin.com">pnadeau@kahnlitwin.com</a>
Vice Chair	Maureen Villadelgado	<a href="mailto:mmv@clarkinphillips.com">mmv@clarkinphillips.com</a>



## NETWORKING COMMITTEE

### PURPOSE AND GOALS

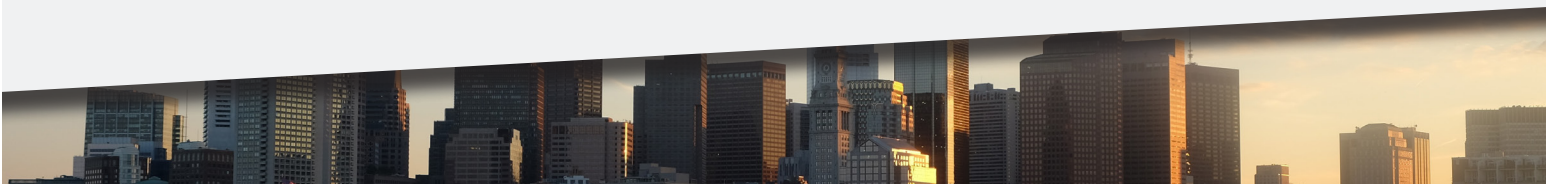
The primary purpose of the Networking Committee is to plan and facilitate events at which members can meet each other in a casual atmosphere to network with other members of the BEPC. The Networking Committee is responsible for organizing several social events throughout the year. Some of these events 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
- Identify "theme" for events
- Manage event budget
- Determine format for event
- Venue set-up
- Audio-Visual requirements

#### Leadership:

Board Liaison	Rebecca MacGregor	<a href="mailto:rmacgregor@wcnllp.com">rmacgregor@wcnllp.com</a>
Chair	Lauren Atsalis	<a href="mailto:latsalis@bassdoherty.com">latsalis@bassdoherty.com</a>
Vice Chair	Molly Soiffer	<a href="mailto:soiffer@bovelanga.com">soiffer@bovelanga.com</a>



## 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:

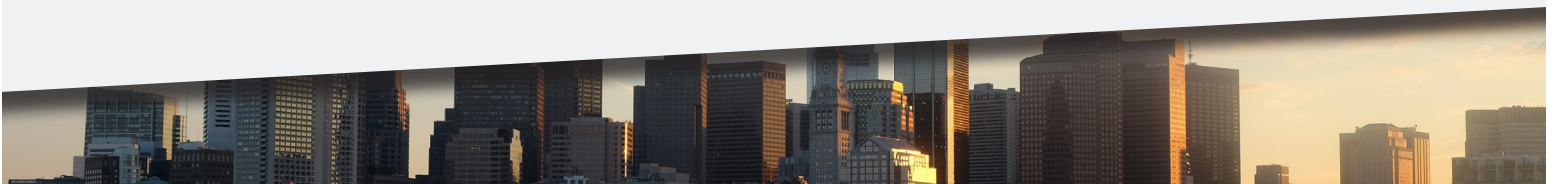
- Solicit and retain annual Corporate and Annual Gala Sponsors to meet annual budget
- Determine criteria and assign speaking opportunities accordingly for sponsors at events
- BEPC Staff to survey sponsors and Committee to appoint sponsors to events
- Work with BEPC Staff on Sponsor benefits tracking 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, benefits and set the associated prices.
- 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.

#### Leadership:

Board Liaison  
Co-Chair  
Co-Chair  
Vice Chair

Zachary Bourque  
David Desmarais  
Christine Fletcher  
Holly Gately

[zab@riceheard.com](mailto:zab@riceheard.com)  
[ddesmarais@KahnLitwin.com](mailto:ddesmarais@KahnLitwin.com)  
[cfletcher@burnslev.com](mailto:cfletcher@burnslev.com)  
[hgately@fbeins.com](mailto:hgately@fbeins.com)



## PUBLIC AND COMMUNITY OUTREACH COMMITTEE

### PURPOSE AND GOALS

The Public and Community Outreach Committee’s purpose is to further BEPC’s commitment to the local community. The committee spearheads the non-profit partnership program. The committee helps engage BEPC members in actively strengthening and supporting community initiatives in Greater Boston by identifying members’ corporate resources and individual charitable interests. In addition, it helps BEPC educate members about the role corporate philanthropy plays in sustaining our local community, increasing a firm’s competitive advantage and strengthening client relationships. The committee works with other BEPC Committees to create a “giving back” culture in BEPC, encourages support through volunteer and philanthropic initiatives, and seeks to enhance public awareness of these efforts.

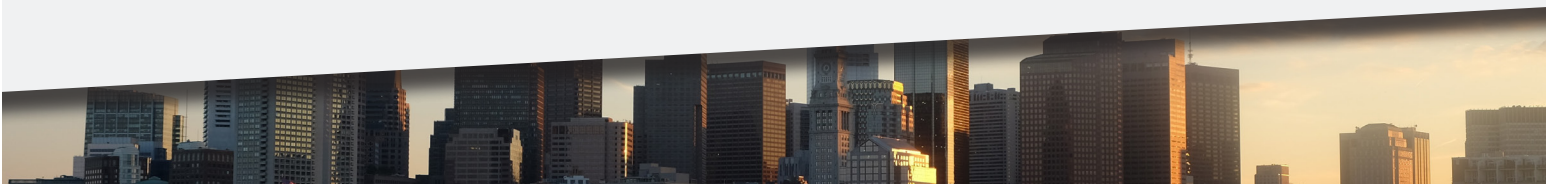
#### Key Responsibilities:

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 Outreach page on the BEPC public website.
- Holiday Support Initiatives. Example: Frosty’s Friends
- Fall Nonprofit Partners Showcase & Networking Event. We have proposed to host this event every two years (i.e., in those years in which we are opening a new nonprofit partnership cycle).
  - Date for event (based on the assigned timeframe on the BEPC Events Calendar)
  - Venue selection
  - Manage event budget
  - Coordinate with the Nonprofit Partners for their participation
  - Determine format for event
  - Venue set-up
  - Audio-Visual requirements
- In the fall when the Nonprofit Partners Showcase & Networking Event is not taking place, another event may take place related to our nonprofit partners and our mission.

#### Leadership:

Board Liaison	Liza Connelly	<a href="mailto:Liza.Connelly@cibc.com">Liza.Connelly@cibc.com</a>
Chair	Megan Hathaway	<a href="mailto:megan.hathaway@tbf.org">megan.hathaway@tbf.org</a>
Vice Chair	Lauren Brown	<a href="mailto:lbrown@pathstone.com">lbrown@pathstone.com</a>





## LEADERSHIP DEVELOPMENT COMMITTEE

### PURPOSE AND GOALS

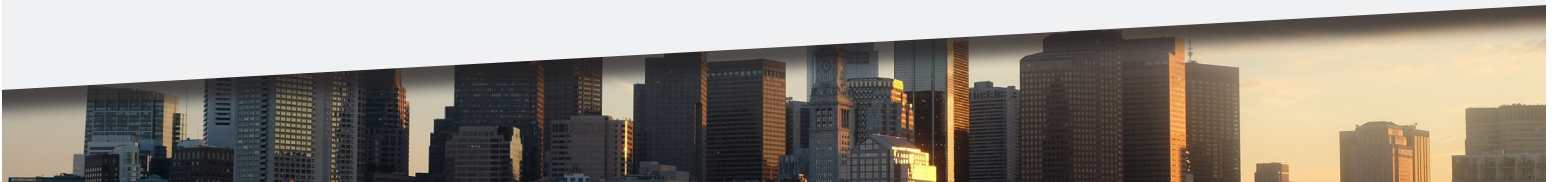
The goal of the Leadership Development Committee is to provide mentoring to current and prospective leaders of the Council. The committee will focus on developing a process to identify prospective leaders and a path to leadership.

#### Leadership:

Board Liaison  
Chair  
Vice Chair

Elliot Rotstein  
Laura Barooshian  
Amy Lonergan

[erotstein@mpival.com](mailto:erotstein@mpival.com)  
[lbarooshian@dgccpa.com](mailto:lbarooshian@dgccpa.com)  
[aloneran@daypitney.com](mailto:aloneran@daypitney.com)



## EDUCATIONAL PROGRAMMING - EDUCATION COMMITTEE

### PURPOSE AND GOALS

The Education Committee oversees BEPC's educational offerings including those organized by the Seminars/Webinars and Roundtables Committees. The Education Committee will 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 the Education Corner within the BEPC BEACON e-newsletter.

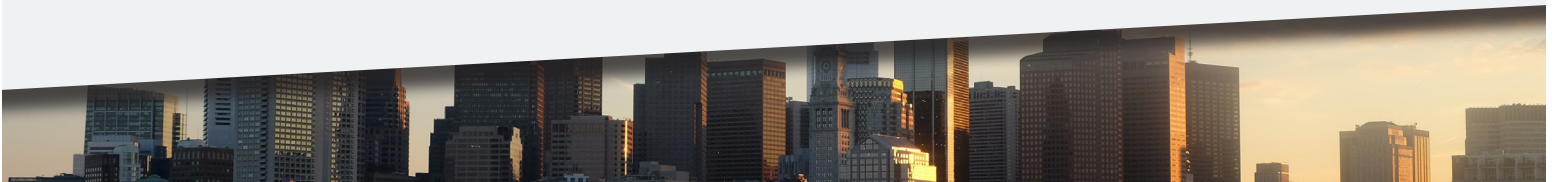
The committee also oversees assignment of the track level and category to all BEPC educational events.

#### Leadership:

Board Liaison  
Chair  
Vice Chair

Susan Robb  
Valerie Sussman  
Richelle Maguire

[srobb@firstrepublic.com](mailto:srobb@firstrepublic.com)  
[vsussman@louriecutler.com](mailto:vsussman@louriecutler.com)  
[rmaguire@dgccpa.com](mailto:rmaguire@dgccpa.com)



## EDUCATIONAL PROGRAMMING – SEMINARS/WEBINARS COMMITTEE

### PURPOSE AND GOALS

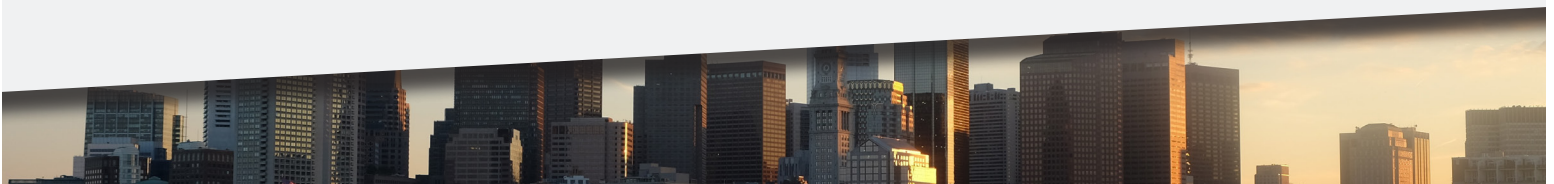
The Seminars/Webinars Committee is responsible for establishing three to four educational seminar events and up to four Webinars on a wide range of themes in order to appeal across the spectrum of BEPC members. The Education Seminar topics should be a mixture of technical versus professional development focused. Webinars are targeted to breaking developments in the law or disciplines associated with estate planning. 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 timeline guidelines.

#### Key Responsibilities:

- Date for event (based on the assigned timeframe on the BEPC Events Calendar in **Appendix I**)
- Venue selection
- 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
  - 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:

Board Liaison	Susan Robb	<a href="mailto:srobb@firstrepublic.com">srobb@firstrepublic.com</a>
Chair	Karen Witherell	<a href="mailto:kwitherell@gmail.com">kwitherell@gmail.com</a>
Vice Chair	Karen McKenna	<a href="mailto:kmckenna@tbhr-law.com">kmckenna@tbhr-law.com</a>
Vice Chair	Nicole Jackson Leslie	<a href="mailto:njackson0023@gmail.com">njackson0023@gmail.com</a>



## EDUCATIONAL PROGRAMMING – 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 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
- Arrange for topics and moderator suggestions to be submitted by BEPC members as well as by the Committee members

#### Leadership:

Board Liaison

Susan Robb

[srobb@firstrepublic.com](mailto:srobb@firstrepublic.com)

Chair

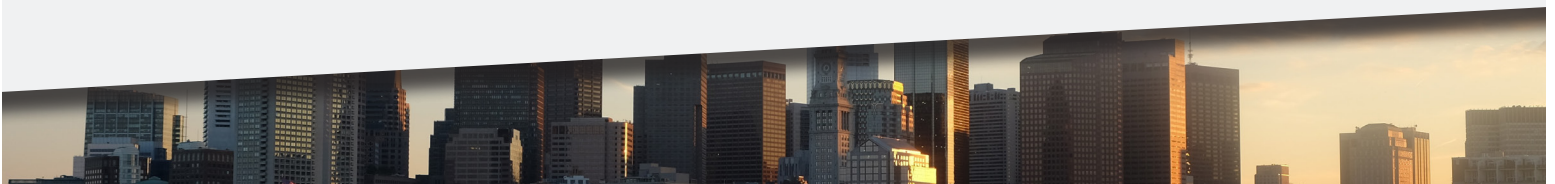
Laura Ames

[lames@casneredwards.com](mailto:lames@casneredwards.com)

Vice Chair

Justin Makso

[jmakso@firstrepublic.com](mailto:jmakso@firstrepublic.com)





## 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 (two education and one networking event)
  - Date for event (based on the assigned timeframe on the BEPC Events Calendar)
  - Venue selection
  - Select Speaker(s)
  - Manage event budget
  - Determine format for event
  - Venue set-up
  - Audio-Visual requirements

### Leadership:

Board Liaison	Barbara Targum	<a href="mailto:btargum@dwithrudd.com">btargum@dwithrudd.com</a>
Chair	Melissa Sydney	<a href="mailto:msydney@tbhr-law.com">msydney@tbhr-law.com</a>
Vice Chair	Beverly Rodrigue	<a href="mailto:brodrigue@namcorp.com">brodrigue@namcorp.com</a>

