

BEPC Welcome Packet 2018-2019



President's Letter



Letter from the President



I am truly honored to serve as the 88th President of the Boston Estate Planning Council. Being a member of BEPC has been and continues to be both personally and professional rewarding. Over the last 13 years I have gotten to know and work with people who are exceptionally dedicated to their field and to BEPC. I thank those individuals and all the organizations for their continued support.

To all the volunteers, the Board and to my fellow Officers, thank you for your commitment and your willingness to share your knowledge and experience to make BEPC a better organization for all members. For those not yet a member, I welcome you to reach out to me or to any of our leaders to learn more about our educational events, networking events and volunteer opportunities. To current members, I encourage you to get involved with one of our many committees.

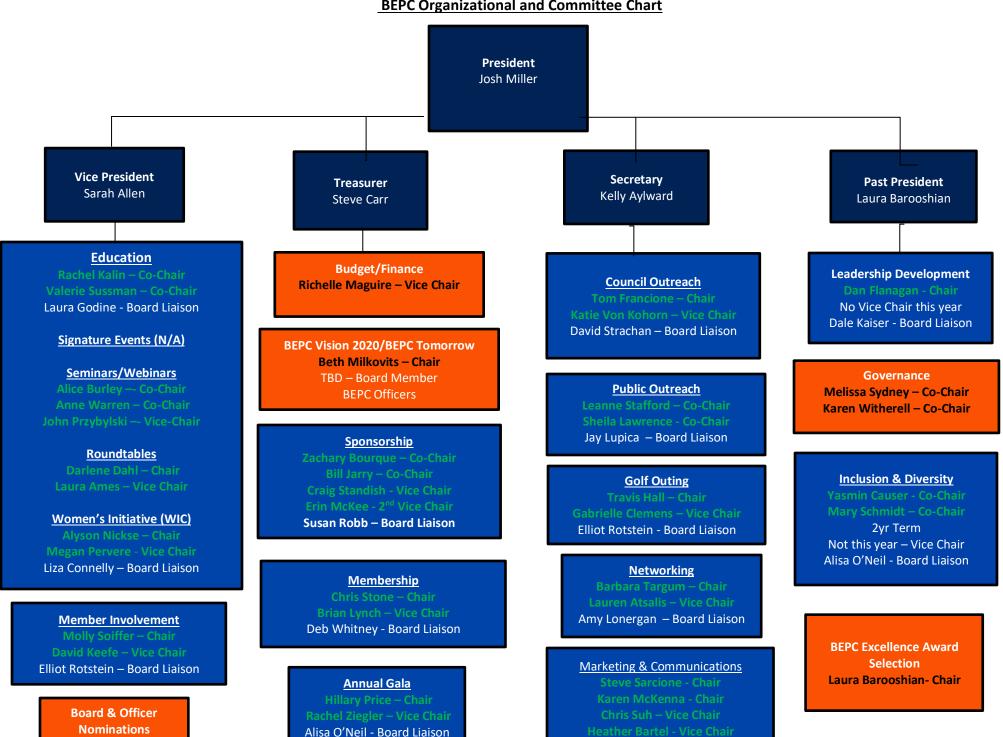
I look forward to seeing you all at an upcoming BEPC event and to working together to build BEPC Tomorrow.

Joshua S. Miller President, Boston Estate Planning Council



Organizational Chart

2018-2019 BEPC Organizational and Committee Chart



Rebecca MacGregor - Board Liaison

Sarah Allen-Chair

2018-2019 BEPC Organizational and Committee Chart

Board of Directors to 2021

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

Board of Directors to 2020

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

Board of Directors to 2019

(A) Yasmin Causer (T&EL) Dale Kaiser (T&EL) Amy Lonergan (WM) Jay Lupica

KEY:

ORANGE: Committee is structured per the requirements set forth in the bylaws.

BLUE: Committee is structured per the Incoming President.



BEPC Committee Guides



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 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 introduces the change of BEPC Leadership from the current President to the Vice President.

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 events calendar)
- Venue selection
- 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

Board Liaison	Alisa O'Neil	alisao@bfminvest.com
Chair	Hillary Price	hillary@koritzwealthstrategies.com
Vice Chair	Rachel Ziegler	rachel@kaiserlawgroup.com



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. The NAEPC calendar of events, and links to the NAEPC website are located. NAEPC events and webinars are featured in our bi-weekly event emails as well, including promoting NAEPC's Annual Conference.
- Coordinate and lead annual AEP information session meeting.

Leadership

Board Liaison David Strachan <u>David.strachan@cambridgetrust.com</u>
Chair Tom Francione <u>tfrancione@lwcotrust.com</u>
Vice Chair Katie Von Kohorn <u>vonkohorn@casneredwards.com</u>



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)
- Venue selection
- Menu choice
- Format of play and prizes
- Event agenda, including networking reception
- Recruiting members and guests to attend the event

Board Liaison	Elliot Rotstein	erotstein@mpival.com
Chair	Travis Hall	thall@admiralsbank.com
Vice Chair	Gabrielle Clemens	gabrielle.clemens@ubs.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:
 - o Email Communications
 - o Print collateral
 - Social Media Plan
 - Web presence
 - Press activities

Board Liaison	Rebecca MacGregor	rmacgregor@wcfllp.com
Co-Chair	Karen Mckenna	kmckenna@tbhr-law.com
Co-Chair	Steve Sarcione	ssarcione@jdjfos.com
Vice Chair	Chris Suh	christopher.suh@schmidt-federico.com
Vice Chair	Heather Bartel	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 President of BEPC sends out a personalized new member welcome note.
- 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 Elliot Rotstein <u>erotstein@mpival.com</u>
Chair Molly Soiffer <u>soiffer@bovelanga.com</u>
Vice Chair David Keefe <u>david@4-pointfinancial.com</u>



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 Deb Whitney <u>dwhitney@ballentinepartners.com</u>
Chair Chris Stone <u>cstone@prwwealthmanagement.com</u>
Vice Chair Brian Lynch <u>brian@lynchinsurancegroup.com</u>



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

Board Liaison	Amy Lonergan	alonergan@daypitney.com
Chair	Barbara Targum	btargum@dwightrudd.com
Vice Chair	Lauren Atsalis	<u>latsalis@bassdoherty.com</u>



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.

Board Liaison	Susan Robb	srobb@firstrepublic.com
Co-Chair	Zachary Bourque	zab@riceheard.com
Co-Chair	Bill Jarry	bill.jarry@bnymellon.com
Vice Chair	Craig Standish	cstandish@brownadvisory.com
2 nd Vice Chair	Erin McKee	emckee@coylecompany.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.
- 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 (September). 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).
 - o Date for event (based on the assigned timeframe on the BEPC Events Calendar)
 - o Venue selection
 - Manage event budget
 - o Coordinate with the Nonprofit Partners for their participation
 - Determine format for event
 - o Venue set-up
 - o 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.
- Nonprofit partners nomination and selection process conducted every 2 years.

Leadership

Board Liaison Jay Lupica <u>jlupica@thecolonygroup.com</u>
Co-Chair Sheila Lawrence <u>slawrence@ballentinepartners.com</u>
Co-Chair Leanne Stafford <u>lstafford@dgccpa.com</u>



Inclusion & Diversity Committee

Purpose and Goals

This committee is tasked to provide insight and advice regarding promoting diversity and inclusion within the Council and the various professions it represents.

We are committed to increasing diversity of people, ideas, and beliefs in order to build an inclusive environment. We accomplish this by developing and implementing an action agenda that recognizes the broad range of interests and values as well as the cultural richness that define the community we serve.

Diversity and inclusiveness in the organization is particularly important when the primary business focuses on people serving people. Working to achieve diverse and inclusive environments has numerous demonstrated benefits, including: 1) Enhanced creativity, 2) More productive communications and 3) Better problem solving.

The committee will consider and develop strategies for Board consideration that foster increased participation in this effort with the objective of making BEPC more accommodating and reflective of members and clients from diverse backgrounds and perspectives. The Committee will remain aware of and ensure coordination and collaboration of diversity and inclusion initiatives throughout BEPC.

Key Responsibilities:

- Gather information on diversity within the membership.
- Conduct and schedule meetings with cross section of members to determine current experiences, attitudes, and expectations to this topic.
- Identify areas and gather suggestions and ideas for improving and/or expanding diversity and inclusion in BEPC.
- Provide action items for Board consideration and incorporation into plan for the following fiscal year.

Board Liaison	Alisa O'Neil	<u>alisao@bfminvest.com</u>
Co-Chair	Yasmin Causer	<u>ycauser@kahnlitwin.com</u>
Co-Chair	Mary Schmidt	mary.schmidt@schmidt-federico.com



Leadership Development Committee

Purpose and Goals

The goal of the Leadership Development Committee is to provide mentoring to Current and Prospective leaders of the Boston Estate Planning Council. The inaugural year of this committee will focus on developing a process for identifying Prospective leaders and for developing a list of Current and Past leaders of the Boston Estate Planning Council who will be available to serve as Mentors for these Prospective leaders.

Leadership

Board Liaison Dale Kaiser <u>dale@kaiserlawgroup.com</u>
Chair Dan Flanagan <u>dflanagan@canbyfinancial.com</u>



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:
 - o Topic and title
 - o Bios from speakers
 - o 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
- Establish level of the educational content: Foundational, Intermediate, Advanced
- 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.

Board Liaison	Laura Godine	lgodine@eatonvance.com
Co-Chair	Alice Burley	aburley@scsfinancial.com
Co-Chair	Anne Warren	anne.warren@bbh.com
Vice Chair	John Przybylski	johnp@pathstone.com



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

Board Liaison	Laura Godine	lgodine@eatonvance.com
Chair	Darlene Dahl	ddahl@daintreeadvisors.com
Vice Chair	Laura Ames	<u>lames@bassdoherty.com</u>



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 (2 Education and 1 Networking Event)
 - o Date for event (based on the assigned timeframe on the BEPC Events Calendar)
 - o Venue selection
 - Select Speaker(s)
 - Manage event budget
 - Determine format for event
 - Venue set-up
 - o Audio-Visual requirements

Board Liaison	Liza Connelly	lconnelly@bostonprivatebank.com
Chair	Alyson Nickse	anickse@crestwoodadvisors.com
Vice Chair	Megan Pervere	megan.j.pervere@us.pwc.com



BEPC Contact List



Contact List - Boston Estate Planning Council

2018 - 2019 Officers, Board Members, and Committee Leads

First Name	Last Name	Title	Company	Email	Work Phone
		Officers	/Board		
losh	Miller	President; Officer	CIBC Private Wealth Management	jmiller@cibcatlantictrust.com	(617) 531-2549
Sarah	Allen	Vice President: Officer	Rice, Heard & Bigelow, Inc.	sma@riceheard.com	(617) 557-7403
Steve	Carr	Treasurer; Officer	Pabian & Russell LLC	scarr@pabianrussell.com	(617) 951-3100
Kelly	Aylward	Secretary; Officer	Lourie & Cutler	kaylward@louriecutler.com	(617) 742-6720
_aura	Barooshian	Past President; Officer	DiCicco, Gulman & Company LLP	lbarooshian@dgccpa.com	(781) 937-5332
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ay	Lupica	Board to 2019/Public Outreach Board Liaison	The Colony Group	jlupica@thecolonygroup.com	(617) 723-8200
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Rebecca	MacGregor	Board to 2020/Marketing & Communications Board Liaison	Wilchins Cosentino & Novins LLP	rmacgregor@wcfllp.com	(781) 235-3564
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Deb	Whitney	Board to 2021/Membership Board Liaison	Ballentine Partners, LLC	dwhitney@ballentinepartners.com	(857) 523-8499
		Committe	e Leads		
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achary.	Bourque	Sponsorship Co-Chair	Rice, Heard & Bigelow, Inc.	zab@riceheard.com	(617) 227-1782
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Γravis	Hall	Golf Outing Chair	Leader Bank	thall@admiralsbank.com	(603) 661-1455

Gabrielle	Clemens	Golf Outing Vice Chair	UBS Wealth Management	gabrielle.clemens@ubs.com	(617) 439-8527
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Lauren	Atsalis	Networking Vice Chair	Bass, Doherty & Finks, P.C.	latsalis@bassdoherty.com	(617) 787-5551
Steve	Sarcione	Marketing & Communications Chair	JDJ Family Office Services	ssarcione@jdjfos.com	(617) 765-2104
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Chris	Suh	Marketing & Communications Vice Chair	Schmidt & Federico, PC	christopher.suh@schmidt-federico.com	(617) 695-0021
Heather	Bartel	Marketing & Communications Vice Chair	Squillace & Associates, P.C.	heather@squillace-law.com	(617) 716-0300