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FOR IMMEDIATE RELEASE

Boston Estate Planning Council Welcomes New President, Officers, and Board Members

With Their Diverse Range of Experience, New Leadership Additions are Poised to Enrich the Council and Support BEPC's Goals of Expanding Education, Diversity, and Community Engagement

WESTFORD, MASSACHUSETTS (JULY 1, 2024) – The Boston Estate Planning Council (BEPC), the definitive professional group of estate and wealth planners in Greater Boston, announced today its new president, officers, and board of directors for the 2024-2025 year, effective July 1, 2024. The new leadership team includes broad representation from across the estate planning industry, enabling BEPC to continue to deliver the highest quality of industry-specific educational and networking opportunities to its members and advance public knowledge of the concept and benefits of estate planning.

BEPC Appoints New Officers, Including Long-time Leader Alisa Kim O'Neil as President

As part of BEPC's seamless leadership transition, Alisa Kim O'Neil, JD, CTFA, AEP®, CDFA®, previously BEPC's president-elect, moves into the role of president. A co-chief planning officer at Boston Financial Management, Kim O'Neil has been an active member of BEPC for close to 20 years, served as an officer since 2021, and has chaired numerous committees.

"I am very excited to be the 94th president of the Boston Estate Planning Council", said Alisa Kim O'Neil, president of BEPC. "I extend my gratitude to my fellow officers, board members, and committee leaders and members for their unwavering dedication, commitment, and camaraderie. I encourage new members to get involved and make BEPC your own. Our organization consistently rises to meet the challenges posed by the ever-evolving landscape of estate planning. The changes we have implemented, and will continue to pursue, enhance our capacity to provide exceptional value to our members."

Richelle Maguire, CPA, AEP®, partner at PKF O'Connor Davies, becomes BEPC's past president and will continue to serve on the BEPC Board of Directors.

BEPC appointed three additional officers for the 2024-2025 term: Loring, Wolcott & Coolidge Trust, LLC Head of Fiduciary Services Thomas Francione, CTFA, AEP® as president-elect; Dwight Rudd Insurance

Managing Partner Barbara Targum, CIC, CAPI as treasurer; and Crestwood Advisors Managing Director and Wealth Strategist Katherine M. Sheehan, JD, AEP®, as secretary.

BEPC's Board of Directors Welcomes Four New Directors and an Honorary Director

As part of the Council's continued focus on industry leadership, BEPC's membership elected four new directors to join the existing board:

- Gerald E. Baker, JD, executive vice president and head of business risk, Wilmington Trust
- Brandon P. Fink, CFP®, AEP®, financial advisor, Claro Advisors
- Dara Lynn S. Freytag, Esq., LL.M., AEP®, partner, Tarlow Breed Hart & Rodgers, P.C.
- Amy K. Phelan, CPA, MST, AEP®, tax shareholder, Tonneson + Co

The BEPC membership also elected Laura K. Barooshian, CPA, AEP®, CAP®, partner at PKF O'Connor Davies, LLP, to serve as the honorary director for the 2024-2025 fiscal year.

About BEPC

The Boston Estate Planning Council (BEPC) is a multi-disciplinary community of approximately 700 estate and wealth planning professionals. The Council provides educational programs and networking opportunities to help its members build and strengthen relationships, learn about ideas and strategies, and share thought leadership.

The Boston Estate Planning Council is one of the oldest and largest interdisciplinary estate planning councils in the country, tracing its roots back to 1930. The Council is an active affiliate of the National Association of Estate Planners & Councils (NAEPC). BEPC has been honored by NAEPC with the Council of Excellence Award in 2023, 2022, 2017, 2016, and 2015. NAEPC also named BEPC a 5-Star Council from 2018 to 2020. More information is available at <http://www.bepc.org>.

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