

For more information, contact:

Cambria Happ, MPA, CAE

Executive Director, Boston Estate Planning Council (BEPC)

Phone: 978-364-5170

E-mail: chapp@bepec.org

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, MA (July 1, 2020) – The Boston Estate Planning Council (BEPC), a multi-disciplinary community of over 700 estate and wealth planning professionals, announced today its new president, officers, and Board of Directors for the 2020-2021 year, effective July 1, 2020. 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 Kelly Aylward as President

As part of BEPC's seamless leadership transition, Kelly Aylward, Esq., LL.M., AEP®, previously BEPC's president-elect, moves into the role of president. A principal of Lourie & Cutler, P.C., Aylward has been an active member of BEPC for over 16 years, has served on the board both in the capacity as a board director (2012 – 2015) and again as an officer since 2017, and has chaired numerous committees.

"I am thrilled to be named the 90th president of the Boston Estate Planning Council," said Kelly Aylward, president of BEPC. "Thank you to my fellow officers, the Board of Directors, and the many volunteers for your time and dedication. Your commitment enables BEPC to grow stronger each year. The Board of Directors and officers are committed to furthering BEPC's mission through our updated strategic plan, BEPC Tomorrow. Through BEPC Tomorrow, we strive to strengthen member engagement, improve collaboration and promote effective feedback mechanisms, and to increase recognition of BEPC and the estate planning profession within the greater Boston professional community. Our work continues to be conducted through the lens of diversity, equity, and inclusion."

Sarah M. Allen, JD, LL.M., AEP®, shareholder and director of Rice, Heard & Bigelow, becomes BEPC's past president and will continue to serve on the BEPC Board of Directors.

BEPC also appointed three additional officers for the 2020-2021 term: Pabian & Russell Partner Steven M. Carr, Esq., LL.M., AEP®, as president-elect; DGC (DiCicco, Gulman & Company) Partner Richelle

Maguire, CPA, MST, AEP®, as treasurer; and Brown Brothers Harriman & Co. Vice President, Private Banking Beth Milkovits, AEP®, CFP® 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:

- David Desmarais, CPA, PFS, MST, MBA, AEP®, partner, Kahn, Litwin, Renza & Co.
- Christine N. Fletcher, Esq., AEP®, partner, Burns & Levinson
- Melissa E. Sydney, Esq., LL.M., partner, Tarlow, Breed, Hart & Rodgers
- Amy R. Lonergan, Esq., partner, Day Pitney

The BEPC membership also elected Jeremiah W. Doyle, IV, JD, LL.M., AEP® (Distinguished), senior vice president of BNY Mellon Wealth Management to serve as the honorary director for the 2020-2021 fiscal year.

About BEPC

The Boston Estate Planning Council (BEPC) is a multi-disciplinary community of over 700 estate and wealth planning professionals. The Council provides educational programs and networking opportunities to help its members build and strengthen relationships with like-minded advisors, learn about cutting edge estate planning ideas and strategies to enable them to better advise their clients, and share though leadership with other members.

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 as a 5-Star Council in 2018 and 2019 and received the Council of Excellence Award in 2015, 2016, and 2017. More information is available at <http://www.bepc.org>.

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