

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 its Goals

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/EINPresswire.com/ -- 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 2022-2023 year, effective July 1, 2022.

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.

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BEPC Appoints New Officers, Including Long-time Leader Beth Milkovits as President

As part of BEPC’s seamless leadership transition, Beth Milkovits, CFP®, previously BEPC’s president-elect, moves into the role of president. A vice president at Brown Brothers Harriman, Milkovits has been an active member of BEPC for a number of years, served as an officer since 2019, and has chaired numerous committees. She is also a

past recipient of the BEPC President’s Award.

“I am humbled and honored to be named the 92nd president of the Boston Estate Planning Council,” said Beth Milkovits, president of BEPC. “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.”

Steven M. Carr, JD, LL.M., AEP®, partner of Rubin and Rudman LLP, becomes BEPC’s past president and will continue to serve on the BEPC Board of Directors.

BEPC also appointed three additional officers for the 2022-2023 term: DGC, a division of PKF O’Connor Davies, Partner Richelle Maguire, CPA, MST, AEP®, as president-elect; Boston Financial Management Director of Estate & Financial Planning Alisa Kim O’Neil, JD, CTFA, AEP®, CDFIA®, as treasurer; and Rice, Heard & Bigelow, Inc. Shareholder and Director Zach Bourque, CFA, 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:

- Mitchell S. Halpern, JD, AEP®, partner, tax services group, KLR
- Nicole Jackson Leslie, JD, vice president, Brown Brothers Harriman
- Emma Penick, MBA, AEP®, CAP®, senior director of gift planning and advisor relations, The Boston Foundation
- Maureen M. Villadelgado, JD, AEP®, principal, Clarkin & Phillips, P.C.

The BEPC membership also elected Carol E. Tully, CPA, JD, AEP®, principal of Wolf & Company, P.C. to serve as the honorary director for the 2022-2023 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 as a 5-Star Council in 2018, 2019, and 2020 and received the Council of Excellence Award in the prior three years (2015 to 2017). More information is available at <http://www.bepc.org>.

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