

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

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

WESTFORD, MASSACHUSETTS, USA, June 30, 2023 /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 2023-2024 year, effective July 1, 2023. 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 Richelle Maguire as President

“

I am truly honored to be the 93rd president of the Boston Estate Planning Council.”

Richelle Maguire, CPA, AEP®

As part of BEPC’s seamless leadership transition, Richelle Maguire, CPA, AEP®, previously BEPC’s president-elect, moves into the role of president. A partner at PKF O’Connor Davies, Maguire has been an active member of BEPC for over 20 years, served as an officer since 2020, and has chaired numerous committees.

“I am truly honored to be the 93rd president of the Boston

Estate Planning Council”, said Richelle Maguire, president of BEPC. “Thank you to my fellow

officers, board members, and committee leaders and members for your dedication, commitment, and comradery. I encourage our members to get involved and go all in. The relationships built within this organization are strong and invaluable. BEPC endured a pandemic and even benefitted from the experience. The changes that we were forced to make in the way we think and act have continued to improve our ability to provide value to our members. We have a leadership structure that has evolved over time and is continuously adapting to meet the needs of changing times. I hope to build on our strong foundation and am excited about the new and continuing initiatives for the upcoming year. 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.”

Beth Milkovits, CFP®, AEP®, vice president, private banking at Brown Brothers Harriman, becomes BEPC’s past president and will continue to serve on the BEPC Board of Directors.

BEPC appointed three additional officers for the 2023-2024 term: Boston Financial Management Co-Chief Planning Officer Alisa Kim O’Neil, JD, CTFA, AEP®, CDFA®, as president-elect; Ballentine Partners Partner and Senior Client Advisor Debra A. Whitney, CFP®, CAP®, AEP®, MS as treasurer; and Loring, Wolcott & Coolidge Trust, LLC Head of Fiduciary Services Thomas Francione, CTFA, 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:

- Jennifer Ann Civitella Hilario, JD, LL.M. (taxation), AEP®, owner, JC Hilario, PC
- David F. Keefe, III, CLU®, ChFC®, owner, 4-Point Financial, LLC
- Kathleen Sablone, JD, co-chief planning officer, Boston Financial Management
- Katherine L. S. Von Kohorn, JD, partner, Casner & Edwards LLP

The BEPC membership also elected Michael L. Brown, JD, CPA, vice chairman and managing director of Boston Financial Management, to serve as the honorary director for the 2023-2024 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 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>.

Cambria Happ

Boston Estate Planning Council

+1 978-364-5170

[email us here](#)

Visit us on social media:

[LinkedIn](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/642329001>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2023 Newsmatics Inc. All Right Reserved.