

Boston Estate Planning Council Honored With the 2024 Council of Excellence Award by NAEPC

WESTFORD, MA, USA, September 4, 2024 /EINPresswire.com/ -- The [Boston Estate Planning Council](#) (BEPC), the definitive professional group of estate and wealth planners in Greater Boston, has been awarded the highest honor available to an estate planning council affiliated with the [National Association of Estate Planners & Councils](#) (NAEPC), the [Leonard H. Neiman and Walter Lee Davis, Jr. Council of Excellence Award](#).



This award recognizes councils that provide a strong multi-disciplinary environment for estate planning professionals within their community, that truly work to grow their programs and services, and that provide an exceptional member experience.

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This recognition is a testament to our unwavering commitment to fostering a dynamic, multi-disciplinary environment for estate and wealth planning professionals in Greater Boston.”

BEPC President Alisa Kim O'Neil, JD, CTFA, AEP®, CDFAs®

“The estate planning councils being recognized with NAEPC’s highest council honor provide an extraordinary level of member service and are contributing to the success of their members, the estate planning profession, and ultimately their community. We commend their leadership for their diligent work and a job well done and are looking forward to recognizing them at the 61st Annual NAEPC Advanced Estate Planning Strategies Conference on October 23, 2024 in Anaheim, California” NAEPC President Kitt McNee said.

On receiving the 2024 award, BEPC President Alisa Kim

O'Neil noted “receiving this award is an honor for the council. This recognition is a testament to our unwavering commitment to fostering a dynamic, multi-disciplinary environment for estate and wealth planning professionals in Greater Boston. It reflects the collective efforts of our members to not only enhance our programs and services but also to elevate the experience of

each individual within our community. We are deeply proud of this achievement and remain dedicated to advancing excellence in estate planning.”

The Council of Excellence Award is named for two individuals who truly sought to strengthen the bond between NAEPC and its affiliated councils during their terms on the board. Walter Lee Davis, Jr. served as president of the association in 2008 and was instrumental in forming the Council Relations Committee, a group of volunteer members who are charged with being a liaison between affiliates and the national association. Leonard H. Neiman served the association as a board member for over 15 years and worked tirelessly to gather information about estate planning councils from around the country.

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 a member of the National Association of Estate Planners & Councils, the leading professional organization for estate planners, which provides its 2,200+ Accredited Estate Planner® designees and over 265 affiliated local estate planning councils and their 28,000 members with ongoing education and a forum for professional networking. BEPC was previously honored by NAEPC as a 5-Star Council in 2018, 2019, and 2020 and received the Council of Excellence Award in 2015, 2016, 2017, 2022, and 2023. More information is available at <http://www.bepc.org>.

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National Association of Estate Planners & Councils logo



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