

Boston Estate Planning Council Receives Prestigious 2025 NAEPC Council of Excellence Award

This award is the highest recognition given to affiliated councils.

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The [Boston Estate Planning Council](#) (BEPC), Greater Boston's leading professional organization for estate and wealth planning, has been honored with the 2025 Leonard H. Neiman and Walter Lee Davis, Jr.

[Council of Excellence](#) Award by the [National Association of Estate Planners & Councils](#) (NAEPC). This award is the highest recognition given to affiliated councils and celebrates outstanding achievement in fostering a collaborative, multi-disciplinary environment for estate planning professionals.



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This achievement reflects our vision of cultivating excellence for estate planning professionals and highlights the collective contributions of our members.”

BEPC President Thomas E. Francione, CTFA, AEP®, ATFA

According to NAEPC, councils selected for the Council of Excellence distinction exemplify the highest level of member service, helping advance not only the success of individual professionals but also the estate planning field and the broader community. The award will be formally presented during a special evening reception on Wednesday, October 22, 2025, at the Council Leadership Conference in Washington, D.C.

On receiving the 2025 award, BEPC President Thomas E. Francione, CTFA, AEP®, ATFA noted “we are honored that

BEPC has once again been recognized with the Council of Excellence award. This achievement reflects our vision of cultivating excellence for estate planning professionals and highlights the collective contributions of our members. Their commitment to fulfilling our organization's mission continues to strengthen both our council and the Greater Boston community.”

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 community of approximately 700 dynamic, diverse and collaborative professionals dedicated to advancing the field of estate planning through fostering connections within the Council; educational programming and professional development for every stage of one's career; thought leadership to promote subject matter expertise; and meaningful service and collaborative partnerships.

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. 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, 2023, 2024, and 2025. More information is available at <http://www.bepc.org>.



Thomas E. Francione, 2025-2026 BEPC President



Council of Excellence

Logo for the NAEPC Council of Excellence recognition

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