

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

BEPC announced today its new president, officers, and board of directors for the 2026-2027 year, effective July 1, 2026

BOXBOROUGH, MA, UNITED STATES, July 1, 2026 /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 2026-2027 year, effective July 1, 2026. The new leadership team includes broad representation from across the estate planning industry, enabling BEPC to continue cultivating excellence for estate planning professionals.



“

Our members are the foundation of BEPC's success.”

*Katherine M. Sheehan, JD,
AEP®, BEPC President*

BEPC Appoints New Officers, Including Long-time Leader Katherine M. Sheehan as President

As part of BEPC's seamless leadership transition, Katherine M. Sheehan, JD, AEP®, previously BEPC's president-elect, moves into the role of president. The managing director and wealth strategist at Crestwood Advisors, Sheehan has

been an active member of BEPC for over two decades, served as an officer since 2024, and has chaired numerous committees.

“Our members are the foundation of BEPC's success,” said Katherine M. Sheehan, president of BEPC. “I look forward to a year of increased engagement, dynamic programming, and new opportunities for professionals across disciplines to connect, learn from one another, and help shape the future of our organization.”

Thomas E. Francione, CTFA, AEP®, ATFA, chief fiduciary officer at Loring, Wolcott & Coolidge Trust, LLC, becomes BEPC's past president and will continue to serve on the BEPC Board of Directors.

BEPC appointed three additional officers for the 2026-2027 term: Dwight Rudd Insurance Managing Partner Barbara Targum, CIC, CAPI, as president-elect; SCS Financial Private Client Group Head of Wealth Strategy Nicole Jackson Leslie, JD, AEP® as treasurer; and Gilmore Rees & Carlson PC Partner Maureen M. Villadelgado, Esq., AEP® as secretary.

BEPC's Board of Directors Welcomes Four New At-Large Directors and an Honorary Director

As part of the Council's continued focus on industry leadership, BEPC's membership elected four new at-large directors to join the existing board:

- John W. Donahue, Esq., LL.M., AEP®, partner at Wilchins Cosentino & Novins LLP
- Kristina L. Foreman, JD, CTFA, AEP®, manager, estate and financial planning at CAPTRUST
- Jennifer M. Hall, CFP®, AEP®, wealth manager and financial planner at Appleton Partners, Inc.
- Nikki Marie Sherwood, Esq., LL.M., AEP®, partner at Nutter

The BEPC membership also elected Joshua S. Miller, JD, CFP®, AEP®, TEP, chief executive officer at Minot's Light Management, to serve as the honorary director for the 2026-2027 term.

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



Brunette woman with glasses in a black outfit



[National Association of Estate Planners & Councils](#) (NAEPC), the leading professional organization for estate planners. BEPC was previously honored by NAEPC as a Five-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>.

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