

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

BEPC Appoints New Officers, Including Long-time Leader Thomas E. Francione as President

WESTFORD, MA, UNITED STATES, July 1, 2025 /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 2025-2026 year, effective July 1, 2025.

The new leadership team includes broad representation from across the estate planning industry, enabling BEPC to continue cultivating excellence for estate planning professionals.



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*Thomas E. Francione, CTFA,
AEP®, ATFA*

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As part of BEPC's seamless leadership transition, Thomas E. Francione, CTFA, AEP®, ATFA, previously BEPC's president-elect, moves into the role of president. The chief fiduciary officer at Loring, Wolcott & Coolidge Trust, LLC, Francione has been an active member of BEPC for nearly two decades, served as an officer since 2023, and has chaired numerous committees.

“As the 95th president of BEPC, I am proud to be part of a long legacy of professionals who have helped to shape this organization into what it is today – one of the largest, most vibrant, and well-respected estate planning councils in the country”, said Thomas E. Francione, president of BEPC. “This year marks an important chapter for us. We're launching a new strategic plan that reflects the values at the heart of BEPC, to cultivate excellence among estate planning professionals. This plan isn't just about where we're going, it's about who we are and the kind of organization we're committed to being.”

Alisa Kim O'Neil, JD, CTFA, AEP®, CDFA®, principal at CAPTRUST, becomes BEPC's past president

and will continue to serve on the BEPC Board of Directors.

BEPC appointed three additional officers for the 2025-2026 term: Crestwood Advisors Managing Director and Wealth Strategist Katherine M. Sheehan, JD, AEP®, as president-elect; Dwight Rudd Insurance Managing Partner Barbara Targum, CIC, CAPI, continues as treasurer; and Brown Brothers Harriman & Co. Managing Director and Senior Wealth Planner Nicole Jackson Leslie, 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:

- Andrew Clark, CPA, AEP®, managing director, CBIZ
- Timothy F. King, managing director, private wealth advisor, Merrill Lynch Wealth Management
- Sarah R. Moore, CLU®, director, advisor relations, The Coyle Company
- Valerie Sussman, JD, CAP®, AEP®, legal counsel to philanthropy and the nonprofit sector, Hurwit & Associates

The BEPC membership also elected Mary H. Schmidt, JD, LL.M. (Taxation), AEP®, counsel at Verrill, to serve as the honorary director for the 2025-2026 fiscal year.

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



Thomas E. Francione, 2025-2026 BEPC President



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

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