



Newsletter

Volume 1 / Issue 2: July 2025

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New Member Welcomes

Please join us in welcoming our newest member(s):

- Jennifer Reardon of The Octopus Life (www.theoctopuslife.com)

ECEPC Events Calendar

- Wednesday, July 23rd, 5:30pm @ Mission Boathouse, Beverly – Annual NAEPC-sponsored Bring-a-Guest Event ([RSVP Here](#) – 21 Guests RSVP'd presently)
- Tuesday, August 12, 5:30pm @ Michael's Harborside, Newburyport – After-Hours Networking for Members (looking for a Sponsor!) ([RSVP Here](#))
- RENEWAL SEASON BEGINS MID-AUGUST – KEEP AN EYE OUT FOR ANNUAL RENEWAL NOTICES!
- Wednesday, September 24th, 8:30am @ Red's Kitchen, Peabody – Economic & Policy Updates for Estate Planning Professionals, sponsored by Blackstone ([RSVP Here](#))
- October Date TBD – Business Succession Planning for Estate Planning Professionals
- November Event presently Date & Topic TBD
- December Holiday Get-Together Date & Location TBD

Sponsor Notes

We're currently seeking sponsors!

Interested in spotlighting your business or firm? Email the Board at [**ecepcouncil@gmail.com**](mailto:ecepcouncil@gmail.com) to learn more.

Upcoming Member Events

Hosting an event? Let us help promote it in the next newsletter.

Submit details to [**ecepcouncil@gmail.com**](mailto:ecepcouncil@gmail.com).

Job Listings & Career Updates

Have a job opening or career news to share?

We're happy to include opportunities and celebrate milestones in our newsletter.

Member Spotlight

Would you like to be featured in an upcoming issue?

Let us know after this first newsletter is live—we'd love to highlight your work!

Event ReCaps

On June 11th we had a great talk from Paul Bernstein re: Asset Protection. Paul did a great job walking us through Domestic Asset Protection Trusts (DAPTs) and the option to combine the structure of a third party Irrevocable Trust to create a "Hybrid DAPT" - very interesting and certainly a topic many of our clients could use some education about!

From the Board

Very much looking forward to the 7/23 Event @ Mission Boathouse, hope to see you all there!

Contact Us

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