



Newsletter

Volume 1 / Issue 1: June 2025

WELCOME!

Welcome to the Newest
Edition of the ECEPC
Newsletter

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New Member Welcomes

Please join us in welcoming our newest members:

- **Stephanie Hood | The Hood Firm, P.C.**
- **Janice Casoli | First Financial Trust**
- **Kathy Boyle | First Financial Trust**

Events Calendar

June 11, 2025	NATIONAL EVENT: NAEPC Webinar: Look What You Made Me Do: A Checklist for Post-Mortem Tax Planning (Taylor's Version) Ashley L. Case, J.D., LL.M., Estate and Trust Law Certified Specialist, AEP®
June 11, 2025	ECEPC June Breakfast & Presentation: Protecting Client Wealth (from Lawsuits) Paul Bernstein, The Bernstein Law Group
July 23, 2025	ECEPC Summer Bring-A-Guest Networking Event
August 12, 2025	ECEPC After-Hours Networking August @ Michael's Harborside
September 24, 2025	Political & Policy Update for Estate Planners Patrick Quinlivan, Principal, Blackstone Private Wealth
October 19, 2025	NATIONAL EVENT: 62nd Annual NAEPC Advanced Estate Planning Strategies Conference The Profession's Leading Experts

Sponsor Notes

We're currently seeking sponsors!

Interested in spotlighting your business or firm? Email the Board at 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.

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

Our **Annual Dinner & Meeting** was a great success!

A big thank-you to **Stratton Lloyd**, President of the **Essex County Community Foundation**, for sharing insights into local philanthropic efforts. And thanks to all who attended!who attended!

From the Board

We are very excited to welcome on Directors Joni Stone, Bridget Murray, and Valerie McCormack, who are joining current President Tucker McDonald, Past President Bailey Bishop, Treasurer Yasmeen Kouki, and Director James Murphy – we look forward to a great year ahead!

Contact Us

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