

EPCWC NEWSLETTER



Affiliated with National
Association of Estate
Planners & Councils

FALL & WINTER 2025 / 2026

Vol.2

A Season of Momentum: Fall Highlights & What's Ahead

A Message from the President:

This past fall, EPCWC leaned into what we do best: connect, collaborate, and learn—with energy, creativity, and purpose. From our **Inaugural Estate Planning Summit** (Oct. 23, 2025) to new ways of building community through networking and service, we've had a truly memorable season.

We also continue to celebrate EPCWC's recognition as a **NAEPC 5 Star Council**, an honor that reflects the strength of our programming and the value of the member experience we deliver together.



*Yvette Wynn, EPCWC
Immediate Past President,
accepting the NAEPC Award.*

Thank you to every member, sponsor, speaker, volunteer, committee leader, and board director who helped make these events meaningful and successful. As we enter winter, we're excited to build on this momentum—expanding member connections, strengthening interdisciplinary relationships, and keeping professional excellence front and center.

**Marie Arrigo, MBA, CPA
EPCWC President**

Stay connected: Full calendar details and registration links are always available at epcwc.org.

Interested in joining an EPCWC Committee?

Learn More: epcwc.org/committees



*Marie Arrigo, EPCWC President,
speaking at the Summit.*

Inaugural Estate Planning Summit — October 23, 2025

Our first-ever Estate Planning Summit, held at the Woman’s Club of White Plains, at the C.V. Rich Mansion in White Plains, NY, brought together professionals across disciplines for a day of learning, conversation, and connection.

Thank you to everyone who attended, sponsored, volunteered, and helped to set a new standard for EPCWC programming.

Program Highlights:



Kenneth A. Horowitz speaking at the podium.

- Our Keynote, **Raymond Radigan**, Senior Managing Director of Peapack Private Bank & Trust, presented on the Importance of Modern Asset Protection Planning.
- **Amy Castoro**, President & CEO of The Williams Group, led an interactive discussion on family dynamics and asked whether the family’s wealth will unify or divide the family? She discussed the need for families to take proactive steps and invest in programs to support family unity in order to achieve success in maintaining a family legacy across generations.
- Board Director and Networking Committee Chair **Maria Nigro** led a panel discussion on the legacy, value and vision in fine art collecting, including an introduction to the art market, managing and protecting collections and planning for inheritance and charitable giving. The panelists were **Peter Costanzo** (Doyle), **Pamela L. Grutman, Esq.**, and **Gregory Smith** (Berkley Asset Protection).
- Other sessions included **Kenneth A. Horowitz’s** discussion on Distribution Planning post the SECURE Act, and a discussion on Planned Giving (**Martine Campoli** (Feeding Westchester) & **Kylan Johnson** (Hudson Valley Estate Planning PLLC)).
- There were numerous networking opportunities throughout the program that sparked follow-up conversations and collaboration.



New Member Networking Event — October 29, 2025

The **New Member Committee** hosted a small networking gathering, at *freebird kitchen and bar* in White Plains with some lite bites and cocktails. This was a great way to engage new members in a more intimate setting to help get them more acquainted with the Council and meet some of the other new members. We are looking forward to hosting another small event like this one in the Spring of 2026. If you are a new member, please check our website for more information in early 2026.

Third Annual Joint Networking Event with EPCCLFC — November 12, 2025

Our partnership with the **Estate Planning Council of Lower Fairfield County** continues to strengthen regional relationships and broaden opportunities for members to connect. This year's event was held at the Greentree Country Club in New Rochelle and was well attended. Thank you to everyone who helped plan and attend this terrific event.

Planning with Purpose: A Day of Service with Feeding Westchester — November 17, 2025

Just ahead of Thanksgiving, Council members came together for a Day of Service that combined meaningful community impact with genuine connection. Hosted by our Annual Gold Sponsor, **Feeding Westchester**, members spent 90 focused minutes packing 1,900 pounds of frozen bread, 802 pounds of frozen desserts and 140 pounds of frozen meals for the organization's Retail Recovery program. Feeding Westchester's Retail Recovery initiative rescues millions of pounds of high-quality food that would otherwise go to waste and redistributes it to families across the county who rely on consistent, nutritious support. The event offered a warm opportunity for members to strengthen relationships outside the usual professional setting while giving back to a mission at the heart of food security in Westchester.



EPCWC NEWSLETTER



Affiliated with National
Association of Estate
Planners & Councils

FALL 2025 EVENT RECAPS

Vol.2

December 10, 1025 Dinner Meeting Featured Our Annual Case Study as well as a Presentation on the Benefits of NAEPC and the Accredited Estate Planner (AEP) Designation



Our December dinner meeting, hosted at the Lexington Square Café in Mount Kisco, featured our annual case study and breakout discussion, authored by member **Brianna Melahn**, with Prism Planning and Solutions Group, LLC.

In addition, NAEPC Board Director **Lawrence K. Bogar** discussed the benefits of NAEPC available to our members as well as the Accredited Estate Planner (AEP) designation.

For more information on **NAEPC** and the AEP designation, see the “NAEPC Corner” section of this newsletter (see page 8).



EPCWC Now Offers CLE for Certain Programs!



In addition to offering CPE for the Certified Public Accountants and CE for the Certified Financial Planners, **the EPCWC now offers CLE for attorneys for certain qualifying programs.**

Thank you to our **CLE Sponsor, the Westchester County Bar Association!**



EPCWC NEWSLETTER



Affiliated with National
Association of Estate
Planners & Councils

UPCOMING COUNCIL EVENTS

Vol.2

4

FEB

RSVP
by
1/28/26

February 4, 2026 Lunch Meeting

Pas-Tina's Restaurant in Hartsdale | 12:00pm - 2:00pm



Join EPCWC for our February lunch program featuring **Amy C. O'Hara**, partner at Littman Krooks LLP and an EPCWC board director, who will discuss the fundamentals of SSI, SSDI, Medicaid and Medicare Eligibility. Reconnect with colleagues across disciplines!

Please visit epcwc.org to view details and register.

Late registrations may be accommodated through 5 pm on Monday, February 2, 2026.

12

FEB

RSVP
by
2/9/26

February 12, 2026 Inaugural Joint Event with the Estate Planning Council of Long Island

Webinar | 8:30am - 9:30am



The EPCWC and EPCLI jointly present a webinar on "Heckerling Update." The speaker will be **Kevin Matz, Esq.**

Please visit epcwc.org to view details and register!

This is a Members only event.

4
MAR

March 4, 2026 Dinner Meeting

Sam's of Gedney Way | 5:30pm - 8:30pm



Our March dinner program features **Thomas A. Tietz, Esq.** a partner with Shenkman Tietz, LLP, who will present on "**Administering Trusts and Estate Planning Transactions: Reviewing Cases and Takeaways to Consider.**"

Join us for this informative topic and the opportunity to network with fellow EPCWC members.

Registration and full details are posted at epcwc.org.



NEW SERIES: HIGHLIGHT AN EPCWC MEMBER – MARIA NIGRO

Vol.2



Maria Nigro

The EPCWC Newsletter is embarking upon a new series, focusing on members who have made a difference for Council members. This issue highlights **Maria Nigro** of Nigro Art Advisory.

Maria is a valued **EPCWC Board Director** and a catalyst for connection across the Council. She serves as **Chair of the Networking Committee**, supports member hospitality as a Check-In Coordinator, and helped shape the experience of our Inaugural Summit as moderator of the art panel. Maria also represents one of EPCWC's newer "disciplines" through the **Affiliated Member** category—bringing fresh perspective and expanded professional reach to our work together.

Under Maria's leadership, the Networking Committee has helped launch several first-time events and partnerships, including relationship-building initiatives with local bar associations, creative networking gatherings (including Bristol locations), and planning for this year's joint event with the Lower Fairfield County Estate Planning Council.

Maria is also an experienced professional in the art advisory arena and we are grateful for her leadership, creativity, and generous board service.

Member Spotlight Q&A *(continued on next page)*

Q

What drew you to EPCWC—and what's made you stay?

A

Since founding Nigro Art Advisory, my work has focused on matters relating to estate planning such as appraisals for estate tax purposes, strategies for collecting fine art, and planning for legacy. When I joined EPCWC in 2022, I was looking for a way to connect with other professionals here in Westchester who also work in this space. I have since met a range of experienced and thoughtful colleagues whose practices complement mine. Additionally, by attending EPCWC events, I have learned a lot about other aspects of estate planning, which helps me better understand and serve my clients' needs.

Q

You've helped launch and grow EPCWC networking in big ways. What makes networking "work" in a council like ours?

A

The opportunity to regularly see members at EPCWC events allows us to build authentic relationships rather than transactional ones. There's real value in face-to-face interaction that you simply can't replicate on platforms like LinkedIn—the depth of conversation and trust that develops over time makes all the difference.



NEW SERIES: HIGHLIGHT AN EPCWC MEMBER – MARIA NIGRO

Vol.2

Q What's one thing you wish every new member knew before their first EPCWC event?

A Don't be intimidated—everyone wants to meet you! The New Member Development Committee pairs new members with experienced mentors, and I encourage New Members to take advantage of that relationship.

Q As an Affiliated Member Board Director, what perspective do you hope to bring to the Council's leadership?

A While traditional members focus primarily on the legal and financial dimensions of estate planning, my perspective as an independent art advisor centers on how clients actually live with, manage, and transfer tangible assets—both their own and those of loved ones. That practical, on-the-ground experience offers a complementary lens to the Council's leadership. I'm also committed to ensuring that Affiliated Members feel welcomed and integrated into the Council—that we're true collaborators, not just peripheral participants.

Q What was most exciting about moderating the art panel at the Summit?

A As someone who loves to collaborate with colleagues in adjacent fields, I genuinely enjoyed putting together an interdisciplinary panel that introduced EPCWC members to appraising personal property, insuring fine art, and other important considerations when clients have valuable collections.

Q What's a professional value (or habit) that helps you build trust quickly?

A Honesty. I'd rather tell a client something they need to hear—even if it's not what they want to hear—than risk their trust by being overly optimistic or vague. That directness, paired with genuine care for their goals, builds credibility quickly.

Q What's ahead for the Networking Committee—any goals you're excited about?

A The Networking Committee is collaborating with a NYC-based attorney to offer a program about how to effectively network. This program will offer tips, strategies, and an action plan for improving your approach to networking. We're considering dates in the spring—more details to come!

(continued on page 8)

EPCWC NEWSLETTER



Affiliated with National
Association of Estate
Planners & Councils

NAEPC CORNER: MEMBER VALUE + DESIGNATION PATHWAYS

Vol.2

NAEPC's mission is to promote excellence in estate planning through exceptional resources, education, and recognition—including the **Estate Planning Law Specialist (EPLS)** certification.



AEP® (Accredited Estate Planner®): Why it matters

The AEP® designation recognizes experienced professionals committed to the team-based approach to estate planning. It is the profession's only graduate-level credential in estate planning.

Benefits include professional recognition, referral network, education opportunities, and discounted conference registration.

Two pathways to apply (high-level)

- **Pathway One: Self-Nomination** (includes graduate-level coursework; experience exemption may apply)
- **Pathway Two: Council Nomination** (streamlined process; replaces three references; reduced fee; coursework not required)

NAEPC Conference Update

Major updates to the annual NAEPC conference will be announced soon including moving the Conference from Fall to Spring and adding virtual conference offerings.

NEW SERIES: Highlight an EPCWC Member *(continued from previous page)*

Q How can members plug in (even if they're busy) and still feel connected?

A Volunteering with the EPCWC is a great way to connect with other members and make an impact. If that seems like too big a commitment, members can start small by helping out at the check-in desk for an event or two. Even that limited involvement creates meaningful connections.

EPCWC NEWSLETTER



Affiliated with National
Association of Estate
Planners & Councils

MEET OUR 2025-2026 OFFICERS

Vol.2



Marie Arrigo, MBA, CPA

President

president@epcwc.org



Christopher Miehl, Esq.

Vice President

vicepresident@epcwc.org



Bharti Gupta CA, CPA

Treasurer

treasurer@epcwc.org



Joanna C. Feldman, Esq.

Secretary

secretary@epcwc.org



Yvette-Michelle Wynn, CFP

Immediate Past President

pastpresident@epcwc.org

EPCWC NEWSLETTER



Affiliated with National
Association of Estate
Planners & Councils

WELCOME NEW MEMBERS!

Vol.2

Please join us in welcoming the newest professionals to our council for 2025–2026:

- Randall Watsek, Financial Advisor (Raymond James)
- Carolyn Yun, CPA, CFP (Hollow Brook Wealth Management)

Interested in becoming a member?

Learn More: epcwc.org/Member_Benefits

THANK YOU TO OUR SPONSORS

Thank You to Our 2025–2026 Annual Sponsors!

We are deeply grateful to the sponsors who support our programming and events.

ANNUAL
PLATINUM
SPONSOR

The New York
Community Trust

ANNUAL
GOLD
SPONSOR

FEEDING
WESTCHESTER

KLG

Business Valuators &
Forensic Accountants

ANNUAL
SILVER
SPONSOR

CG

Censullo, Gupta &
Associates, CPA, LLP

Interested in becoming a sponsor?

Contact us to learn more about visibility and benefits.