

EPCWC NEWSLETTER



FALL 2026

Vol.4

A NEW YEAR BEGINS! WELCOME BACK!

A Message from the President:

As we begin the upcoming council year, we hope to build on the momentum we have achieved this past year by strengthening our programming and enhancing the member experience. We hope to continue to find new ways to expand member connections and to foster interdisciplinary relationships.

This past summer and early fall, members enjoyed several networking opportunities, including a joint event with New York Community Trust, the Estate Planning Council of Long Island, and the New York City Estate Planning Council, as well as a cocktail hour at freebird kitchen and bar in White Plains.

Our upcoming dinner meeting on October 21 at Sam's of Gedney Way will be co-hosted with the Lower Fairfield County Estate Planning Council, providing ample opportunity to network with colleagues from both Councils. The evening will also feature an informative presentation by Audra Lewton, Esq. on charitable planning strategies.

On November 18, we will host our Second Annual Estate Planning Summit, conveniently located at the Conference Center at 1133 Westchester Avenue, White Plains. We are working on an agenda that I hope will be of great interest to our members, and I am excited to announce that the speakers will include Brian Miller, Jenny Pitman, Andi Hughes, Samantha Lyons, Kevin Matz, and Sean Weissbart, with the Hon. Brandon R. Sall, the Surrogate of Westchester County, delivering the keynote.

Please stay connected and get involved by attending our meetings. Full calendar details and registration links are always available at epcwc.org. If you are interested in serving on a committee or becoming more involved in Council leadership, please reach out to me directly. You can also learn more about EPCWC Committees at epcwc.org/committees.

We look forward to an exciting year at the EPCWC.

Christopher Miehl, Esq.

EPCWC President, FY2026-2027



p: 914.948.1556

e: president@epcwc.org

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SUMMER AND EARLY FALL 2026 EVENT RECAPS

Vol.4

July 15, 2026 Women's Event

This breakfast meeting hosted by **The Bristol of Armonk**, featured good connection, discussions and community! The event included a brief presentation about The Bristol, with tours available upon request.



July 16, 2026 Summer Social BBQ Party



Sponsored by the EPCWC's Platinum Sponsor, the **New York Community Trust (NYCT)**, this event was exclusively for the members of the Estate Planning Councils of Long Island, New York City and Westchester County and was held at the NYCT offices in Commack, NY. Members enjoyed a fun and relaxing evening, with good food, drinks and conversations.



September 23, 2026 Fall Networking

The EPCWC marked the end of summer and the beginning of fall with a **Members Only Happy Hour** at **freebird kitchen and bar** in White Plains. This informal networking event was well received by attendees.



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UPCOMING COUNCIL EVENTS

Vol.4

21
OCT

RSVP by
10/14/26

October 21, 2026 Dinner Meeting

Sam's of Gedney Way, White Plains | 5:00 pm – 8:00 pm



Co-hosted with Lower Fairfield
County Estate Planning Council



Join us for our **annual networking event** with the **Lower Fairfield County Council** and also hear a presentation by **Audra Lewton, Esq.**, Director of Planned Giving of the New York Community Trust on **"Enhancing Client Plans with Charitable Giving: Opportunities & Solutions Through Community Foundations."**

5
NOV

RSVP by
10/29/26

November 5, 2026 NextGen Mixer

Wolf & Warrior, White Plains | 5:30 pm – 7:30 pm

Sponsored By **Tompkins Financial Advisors**



Join us for a special mixer for early-mid career professionals hosted by the **New York Community Trust's Rising Advisor Network** and the EPCWC's newly formed **NextGen Group**.

Enjoy lite bites and drinks while getting to know professionals across the accounting, finance, law, insurance and other professional services sectors.

Members and non-members welcome.

Thank you to our sponsor, **Tompkins Financial Advisors**!



12
NOV

RSVP by
11/5/26

November 12, 2026 Lunch Meeting

Trattoria 632, Harrison, NY | 12:00 pm – 2:00 pm



Council member and Past President, **Michael K. Rosenman, CLU**, ChFC, CASL, AEP, RICP, WMCP will present a primer on life insurance.

EPCWC NEWSLETTER



UPCOMING COUNCIL EVENTS *(continued from previous page)*

Vol.4

**18
NOV**

RSVP by
10/14/26

November 18, 2026 Second Annual Estate Planning Summit

Conference Center, 1133 Westchester Avenue, White Plains
9:00 am - 3:00 pm

Enjoy a half day of learning and connecting with estate planners.
Agenda to follow.

Keynote will be the Hon. Brandon R. Sall, Surrogate, Westchester County.



**9
DEC**

RSVP
by
12/2/26

December 9, 2026 Dinner Meeting

Harrison Meadows Country Club, 123 North Street, Harrison NY
5:00 pm - 8:00 pm

Sponsored by the AEP® Designation

Join us for an evening of networking as we analyze and discuss a
twist on our annual case study.

Plus, learn about the benefits of NAEPC and the AEP® Designation.



MEMBER SPOTLIGHT: MICHAEL ZIMINSKY



Michael Ziminsky

We are proud to recognize EPCWC member Michael Ziminsky.

Michael is currently **Secretary of the Council** and is an active member of the Council's **New Member Development Committee** as well as the **Networking Committee**.

Michael is an **Assistant Vice President and Trust Officer** with **Tompkins Financial Advisors**. Michael is also a board director for the **Hudson Valley Estate Planning Council**. He is an active participant in the Hudson Valley market's community engagement program, regularly attending **Relay for Life**, **The Walk to End Alzheimer's**, **Make-A-Wish** and other various community service events.

Congratulations, Michael, on these accomplishments!

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NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS (NAEPC) CORNER



Vol.4

Julia A. Peloso-Barnes is honored!



We are pleased to announce that NAEPC's 2026 recipient of the Robert E. Fox, CLU®, AEP® Volunteer Service Award has been awarded to Julia A. Peloso-Barnes, CFP, ADPA, CRPC!

Julia served on the board for eight years and rolled off the board as Immediate Past President in June 2025. During the 2025-2026 year, Julia continued to serve the Council in a variety of ways, including chairing the Event Planning Committee. She is an excellent ambassador for the Council at meetings by making networking introductions and providing background when questions from the current board surfaces, as she was in a key leadership role when our administrator of 25 years retired. She was an architect of the post-administrator model, which the board leverages to complete the required tasks of the Council. She continues to be very generous with her time and expertise. Julia is currently CEO and Senior Wealth Manager for Prism Planning and Solutions Group.*

Congratulations, Julia!

**Prism Planning and Solutions Group is a dba of PPSGRP, an SEC Registered Investment Adviser. Registration does not imply a certain level of skill or training.*

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INTERESTED IN BECOMING A MEMBER?

To learn more about becoming a member, please visit epcwc.org/Member_Benefits

We encourage existing members to continue inviting colleagues and professionals in the industry to learn more about EPCWC. As a reminder, **members receive a \$50 membership renewal credit when they nominate someone who joins the Council.**

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MEET OUR OFFICERS FOR 2026–2027

Vol. 4.



Christopher Miehl, Esq.

President

president@epcwc.org



Joanna C. Feldman, Esq.

Vice President

vicepresident@epcwc.org



Bharti Gupta, CA, CPA

Treasurer

treasurer@epcwc.org



Michael Ziminsky

Secretary

secretary@epcwc.org



Marie Arrigo, MBA, CPA

Immediate Past President

pastpresident@epcwc.org

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WELCOME NEW MEMBERS!

Vol.4

Please join us in welcoming the newest professional to our council for 2026–2027:

- Alexander Salvato, Associate
(Mackey Catania & Whalen LLP)

Interested in becoming
a member?

Learn More: [epcwc.org/
Member_Benefits](https://epcwc.org/Member_Benefits)

THANK YOU TO OUR SPONSORS

Thank You to Our 2026–2027 Annual Sponsors!

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

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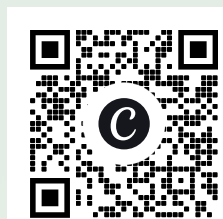
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