

EPCWC NEWSLETTER



SPRING 2026

Vol.3

The Momentum Continues: Spring Highlights as the Year Closes

A Message from the President:

This spring, the EPCWC continued its programming with **excellent technical content** as well as increasing **networking opportunities** for its members. Several events are being planned for the summer, and we hope to see all of you at upcoming events. **Please stay connected!**

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

As the year closes, I want to thank all of you for your **participation, engagement, and support** throughout the year. When we started the year, our goal was to strengthen our programming and the value of the member experience. We have advanced this goal by finding new ways to extend member connections and strengthen interdisciplinary relationships, such as our **Inaugural Estate Planning Summit, joint networking and technical meetings** with the Lower Fairfield County and Long Island Councils and a **day of service** with one of our sponsors, Feeding Westchester. We have also improved our **Sponsorship model, dues renewal process**, offer to our attorney members **CLE for certain programs** (in addition to CPE and CE for our CPA and CFP members, respectively) and expanded our **participation with NAEPC**, all in the interest of improving internal operations and creating increased benefits for the membership.

We are pleased to welcome **Christopher Miehl** as incoming President. Chris will be looking for members interested in serving on committees and becoming more involved in Council leadership. If you are interested, please reach out to Chris directly. **You can also learn more about EPCWC Committees by checking out epcwc.org/committees.**

Thank you again for helping to make this a strong and meaningful year for EPCWC. It has been a pleasure and honor to serve you as your Council President this past year!

Marie Arrigo, MBA, CPA
EPCWC President, FY2025-2026

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February 4, 2026 Lunch Meeting

Amy C. O'Hara, partner at Littman Krooks, LLP and an EPCWC Board Director, presented on the **Fundamentals of SSI, SSDI, Medicaid and Medicare Eligibility**. The well-attended event was held at Pas-Tina's Restaurant in Hartsdale.

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

The EPCWC and the EPCLI jointly presented a member-only webinar on the **Highlights of the 2026 Heckling Institute of Estate Planning Completed Proceedings**. The speaker was Kevin Matz, Esq., who is a partner at ArentFox Schiff.

March 4, 2026 Dinner Meeting

Our March dinner meeting was held at Sam's of Gedney Way in White Plains and began with a **"speed networking activity"** where participants were able to connect with each other akin to a speed dating scenario. The dinner program featured **Thomas A. Tietz**, a partner with Shenkman Tietz, LLP, who presented on **"Administering Trusts and Estate Planning Transactions: Reviewing Cases and Takeaways to Consider."**



New Member Networking Event—April 22, 2026

The New Member Development Committee hosted another lively happy hour networking event at *freebird kitchen and bar* in White Plains. The first event was held in October 2025. The event was hosted by two of our committee members and joined by several of our new members. It was great to see such an **active, engaged group** come together, forming **new connections** and **strengthening** the Council's community.

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May 6, 2026 Breakfast Meeting



Joanna C. Feldman, partner at Maker, Fragale & DiCostanzo, LLP and the Council's Secretary, presented on "Integrating Elder Law into Modern Estate Planning: Practical Solutions" at the Harrison Meadows Country Club.

Attendees enjoyed an insightful presentation as well as a lovely breakfast and networking.

June 3, 2026 Annual Membership Dinner Meeting

Our June dinner meeting was conducted at Sam's of Gedney Way in White Plains. We held our Annual Meeting and presented a slate of Officers and Directors to the Membership for the 2026-2027 year. Also, Joseph Scorese, a partner at Sills Cummis & Gross, presented on Generation-Skipping Transfer (GST) Tax Planning for Trustees of Taxable Trusts: "One" is Not a Singular Sensation. In addition, we conducted a networking activity ("Two truths and a Pitch") as an icebreaker!



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!**



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UPCOMING COUNCIL EVENTS

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15
JUL

RSVP
by
7/8/26

July 15, 2026 Women's Event at The Bristol

The Bristol of Armonk | 8:30 am – 10:00 am

Join us for a welcoming morning of conversation, connection and community! The event includes a brief presentation about The Bristol, with tours available upon request.

All are welcome.

Please visit epcwc.org to view details and register.

Late registrations may be accommodated through 5 pm on Monday, July 13, 2026.



16
JUL

RSVP
by
7/10/26

July 16, 2026 Summer Social BBQ Party

Sponsored by the New York Community Trust

5:30 pm – 8:30 pm | 50 Vanderbilt Motor Pkwy, Commack NY

This event is an exclusive invite for the members of the Estate Planning Councils of Long Island, New York City and Westchester County. Enjoy a fun and relaxing evening meeting fellow council members of all three Councils!

Members only.



MEMBER SPOTLIGHT: BRIANNA MELAHN, CFP®



Brianna Melahn, CFP®

We are proud to recognize EPCWC member **Brianna Melahn CFP®** on recently earning her **CFP® designation** — a significant professional milestone. Brianna also authored the **case study** featured as the primary topic of discussion at our **December 2025 meeting**. Brianna is also an active member of the **EPCWC Networking Committee**.

Congratulations, Brianna, on these outstanding accomplishments!

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NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS (NAEPC) CORNER

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Congratulations!

The EPCWC congratulates Members **Carolyn Yun, Bonnie Yam, and Vittorio Pavia** who have been awarded the **Accredited Estate Planner® (AEP®) designation**. This achievement is a significant professional milestone.



Carolyn Yun



Bonnie Yam



Vittorio Pavia

The **AEP® designation** is a graduate specialization in estate planning awarded in addition to professional credentials already recognized within the various disciplines of estate planning. It is **awarded by NAEPC to recognize estate planning professionals who meet stringent requirements** of experience, knowledge, education, professional reputation, and character. AEP® designees must embrace the team concept of estate planning and adhere to the NAEPC Code of Ethics.



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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THANK YOU TO OUR 2025-2026 OFFICERS

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MEET OUR INCOMING OFFICERS FOR 2026-2027

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WELCOME NEW MEMBERS!

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

- **Bonnie Jackson Boyce, VP, Senior Trust Officer (Fiduciary Trust Company International)**
- **Nicholas M. Colombo, Financial Advisor (Edward Jones)**
- **Caitlin M. Griffin, Counsel (Falcon Rappaport & Berkman LLP)**
- **Ardal K. Powell, Financial Advisors (Eagle Strategies LLC)**
- **Elyse L. Schajer, Partner (Federman Steifman LLP)**

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.

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**Censullo, Gupta &
Associates, CPA, LLP**

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