

EPCWC NEWSLETTER



ESTATE
PLANNING
COUNCIL
of Westchester County



Affiliated with National
Association of Estate
Planners & Councils

Summer 2025

Vol.1

UPCOMING EVENTS

EPCWC: Sept. 17th Dinner Meeting

Ciao! Restaurant in Eastchester

5:30-8:30pm

Overview of Tax-Deferred Exchanges - with
Speaker Tom Lester, CAIA

RSVP BY SEPT 10th

EPCWC: Nov. 5th Lunch Meeting

Location TBD

11:45am-2:00pm

Year-end Estate Planning with Gifts &
Spousal Lifetime Access Trusts (SLATs) - with
speakers Christopher Miehl, Esq. & Michael
Markoff, Esq., Danzinger & Markoff LLP

RSVP BY OCT 15th

**Joint Networking Event Nov 12th -
EPCWC & EPC Lower Fairfield County
Greentree Country Club in New Rochelle
4:30-8:00pm**

RSVP BY NOV 10th

SAVE THE DATE

EPCWC ESTATE PLANNING SUMMIT

 **OCTOBER 23, 2025**
8:15AM - 3:00PM

The Woman's Club of White Plains, Inc
At the C.V. Rich Mansion
305 Ridgeway, White Plains, NY 10605



A BRIEF HISTORY OF THE COUNCIL



The Estate Planning Council of Westchester County was founded in 1967 to promote networking, interdisciplinary collaboration, and education among estate planning professionals. As an affiliate of the National Association of Estate Planners & Councils (NAEPC), we're committed to raising the standard of estate planning throughout Westchester County.

ESTATE PLANNING COUNCIL OF WESTCHESTER COUNTY
333 MAMARONECK AVE. SUITE 330
WHITE PLAINS, NY 10605

WWW.EPCWC.ORG
ADMIN@EPCWC.ORG

EPCWC NEWSLETTER



ESTATE
PLANNING
COUNCIL
of Westchester County



Affiliated with National
Association of Estate
Planners & Councils

Member Benefits

NAEPC LEARNING OPPORTUNITIES

EPCWC members gain access to resources from the National Association of Estate Planners & Councils:

- Monthly Webinar
- The Journal of Estate & Tax Planning
- Annual Advanced Estate Planning Conference

View full offerings:

www.naepc.org

Why Earn the AEP® Designation?

The Accredited Estate Planner® (AEP®) credential recognizes experienced professionals committed to team-based estate planning.

Learn more:

www.naepc.org/designations

Benefits include:

- National recognition
- Access to exclusive NAEPC tools
- Stronger professional visibility



THIS JUST IN...



Estate Planning Council of Westchester County Is Recognized As A 5 Star Council By The National Association Of Estate Planners & Councils (NAEPC)!

The Estate Planning Council of Westchester County has been honored with the prestigious **5 Star Council** designation by the National Association of Estate Planners & Councils (NAEPC), as part of the Leonard H. Neiman and Walter Lee Davis, Jr. Council of Excellence Award program. This recognition highlights councils that demonstrate outstanding achievement in delivering a strong and valuable membership experience.

A special thank you to Immediate Past President, Yvette-Michelle Wynn who led this initiative and submitted our first application to be considered for this award, with full board support!



ESTATE PLANNING COUNCIL OF WESTCHESTER COUNTY
333 MAMARONECK AVE. SUITE 330
WHITE PLAINS, NY 10605

WWW.EPCWC.ORG
ADMIN@EPCWC.ORG

EPCWC NEWSLETTER



ESTATE
PLANNING
COUNCIL
of Westchester County



Affiliated with National
Association of Estate
Planners & Councils

EPCWC: Who's Who

MEET OUR 2025-2026 OFFICERS



President

Marie Arrigo, MBA, CPA
president@epcwc.org



Vice President

Christopher Miehl, Esq.
Danziger Markhoff LLP
vicepresident@epcwc.org



Treasurer

Bharti Gupta CA, CPA
**Censullo, Gupta &
Associates, CPA, LLP**
treasurer@epcwc.org



Immediate Past President

Yvette-Michelle Wynn, CFP
Morgan Stanley
pastpresident@epcwc.org



Secretary

Joanna C. Feldman, Esq.
**Maker, Fragale &
DiCostanzo LLP**
secretary@epcwc.org

WELCOME NEW MEMBERS!

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

- Daniel Alcott
- Kyle Kirby
- Shawn McMaster



Interested in becoming a
member?

Learn More:

[epcwc.org/Member_Benefits](https://www.epcwc.org/Member_Benefits)

EPCWC NEWSLETTER



ESTATE
PLANNING
COUNCIL
of Westchester County



Affiliated with National
Association of Estate
Planners & Councils

Our Sponsors

Thank You to Our 2025–2026 Annual Sponsors!

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

Interested in becoming a sponsor? [Contact us](#) to learn more about visibility and benefits.

ANNUAL PLATINUM SPONSOR

The New York
Community Trust

As Westchester's local community foundation, The New York Community Trust brings together the contributions of donors past and present to champion local causes, address our community's urgent challenges, and advance long-term systemic change.

<https://thenytrust.org/work-with-the-trust/>

ANNUAL GOLD SPONSOR

FEEDING
WESTCHESTER

The mission of Feeding Westchester is to nourish our neighbors in the fight against hunger. We envision a community where all people have access to the food they need today, and the fundamental resources to build a better tomorrow.

feedingwestchester.org