

# Nominations are currently being sought for the Boston Estate Planning Council's 2010 Estate Planner of the Year Award.

## 2010 BEPC Estate Planner of the Year Award Nomination Form

*James M. O'Neil Jr., Esquire, Boston Estate Planning Council Immediate Past President & Selection Committee Chairman*

Each year the Boston Estate Planning Council takes the time to honor one estate planner from various disciplines who has made significant contributions to the profession. The 2010 Recipient will be honored on May 27, 2010



### Boston Estate Planning Council's Estate Planner of the Year **NOMINATION FORM**

*In my opinion, the following person has rendered service to Boston's professional estate planning community so outstanding and above and beyond the call of duty as to merit consideration for the 2010 Boston Estate Planning Council's Estate Planner of the Year Award.*

#### Who can Nominate?

Only Members of the Boston Estate Planning Council can nominate a candidate for this prestigious award. Each Member of the Boston Estate Planning Council is limited to ONE nomination in any given year.

Please provide a simple statement of what you think uniquely qualifies your nominee for the Estate Planner of the Year Award. Should your candidate be among those that will be considered, you will be asked to provide the following: Industry Contributions, Community Service, Academic Involvement, Publications, Speaking Experience, And Professional Involvement.

#### Please keep in mind the following when considering your nominees:

- Very strong preference is given to members of Boston's professional estate planning community who are members of the Council. Second preference is given to a person with strong connections to the Boston professional estate planning community.
- The candidate must enjoy an excellent reputation among his or her peers for upholding the highest standards of the estate planning profession.
- Considerable weight is given to a showing of broad support as evidenced by multiple nominations of one individual or multiple letters of support endorsing a particular nominee.

NAME: \_\_\_\_\_

POSITION: \_\_\_\_\_

COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY/STATE/ZIP: \_\_\_\_\_

**My Nominee is uniquely qualified for this award because:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

NOMINATOR: \_\_\_\_\_

COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY/STATE/ZIP: \_\_\_\_\_

PHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**In order to be considered, ALL  
nominations must be postmarked no  
later than February 19, 2010**

Submit to:  
BEPC Estate Planner of the Year Award  
Selection Committee  
PO Box 500, Hingham, MA 02043  
Fax: 617.266.6849  
Email: BEPC@bepc.org

We are proud to recognize our past recipients of the Estate Planner of the Year Award

Jeremiah W. Doyle IV, Esquire	2009
Michael L. Brown, JD, CPA	2008
Patricia M. Annino, Esquire	2007
Willie J. Goldwasser, CLU, ChFC	2006
Carol E. Tully, JD, CPA	2005
William D. Kirchick, Esquire	2004
Edward D. Tarlow, Esquire	2003
Virginia F. Coleman, Esquire	2002
George L. Cushing, Esquire	2001
Eric P. Hayes, Esquire	2000
J.H. Daingerfield Perry, CLU	1999
The Honorable Nancy Gould	1998
Natalie B. Choate, Esquire	1997
Alexander A. Bove, Jr., Esquire	1996
Mary H. Schmidt, Esquire	1995
Eustice W. Buchanan, Esquire	1994
Kevin M. Flatley, JD, Esquire	1993
William B. Tyler, Esquire	1993
Vincent C. Bowhers, CLU, ChFC	1992
Raymond H. Young, Esquire	1991
Dean A. James Casner	1990



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## 2010 BEPC Estate Planner of the Year Selection Committee Policies and Procedures

*James O'Neil Jr., Esquire, Boston Estate Planning Council Immediate Past President & Selection Committee Chairman*

Boston Estate Planning Council, 2010 Estate Planner of the Year Selection Committee Policy

The sitting Officers & Board of Directors in any year will be given the responsibility to nominate individuals who will be considered for the 5 vacant committee positions on this committee by the Chair and Vice Chair of this committee. Each sitting Board member is asked to nominate TWO committee Members (one nominee must be from their practice category and one nominee from any other practice category). All Nominees MUST be full members in good standing. Please be thoughtful in your nomination process as we need members of the Council who will have an understanding of the experience and knowledge of those people in the industry who may be nominated for this award.

**The Estate Planner of the Year Selection committee will look as follows:**

- Chair: Immediate Past President of the BEPC
- Vice Chair: Current Sitting President of the BEPC
- NEW: All Members selected to this committee shall be Full Members as defined in the Articles of Association, amended and approved on September 19, 2008. The committee will consist of a total of 7 Members (including the Chair and Vice Chair) with the remaining 5 members to be in one of the established practice categories defined below with no more than 2 committee members from any one practice category.

**New:**

One Life Insurance Practice Area Committee member  
One Accounting Practice Area Committee Member  
One Financial Planning Practice Area Committee Member  
One Trusts & Estates Law (practicing attorney in a law firm) Practice Category Committee member  
One Trust Administration Practice Category Committee Member  
One Wealth Management Practice Category Committee Member  
One Planned Giving Practice Category Committee Member  
One Family Office Management Practice Category Committee Member

Each Board member must submit their nominations by Noon on December 20<sup>th</sup>. Please forward your nominations by electronic mail to sit on this very important committee to:

BEPC Association Headquarters  
c/o Estate Planner of the Year Selection Committee Chair  
James O'Neil, Esquire  
at [BEPC@becp.org](mailto:BEPC@becp.org) by Noon on December 20<sup>th</sup>

All nominations will be gathered by BEPC Headquarters and forwarded to the Chair and Vice Chair who will select the committee members from those nominations and have a working committee in place by February 1<sup>st</sup>

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The charge for this committee will be to review all nominations from the general membership for consideration as the 2010 Recipient of the Estate Planner of Year award received by the deadline of February 19, 2010. After reviewing these nominations, the committee will identify and move forward those candidates for final consideration. Those candidates chosen to move forward must be set forth and confirmed by a majority vote of this committee. Selection committee member will be bound to the parliamentary procedures as outlined in the Roberts Rules of Order.

Those candidates that are confirmed to move forward in the nominations process then will be scored on a system that was devised, implemented and confirmed by the Board of Directors in December 2005 and revised in June 2009.

The Selection Committee will receive the list of the past three year's records of nominations for reference however the committee is bound to select the final candidates from the nominations submitted for 2010 only and only those nominations that were received by the deadline of February 19, 2010.

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The committee will meet in the Month of March and have a final decision by March 23, 2010.