

## 2010/2011 BEPC Member Involvement Committee

### Member

### Company

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<b>Ballinger</b> Ballinger Financial Services 53 Marshall Street (781) 431-7711	Regina MBA, CFP  Needham regina@ballingerfs.com	MA 02492
<b>Causer</b> Tonneson & Company 401 Edgewater Place, Suite 300 (781) 245-9999	Yasmin CPA, CFP, PFS  Wakefield yac@tonneson.com	MA 01880
<b>Decatur</b> Moors & Cabot, Inc. 111 Devonshire Street (617) 314-0220	Stephen Jr.  Boston sdecatur@moorscabot.com	MA 02109
<b>Fletcher</b> Rubin, Weisman, Colasanti, Kajko & 430 Bedford Street (781) 860-9500	Christine Esquire  Lexington cfletcher@massfirm.com	MA 02420
<b>Kaiser</b> Attorney at Law 10 Laurel Avenue 2nd Floor (617)641-0000	Dale Esquire  Wellesley dale@dkaiserlaw.com	MA 02481
<b>McGowan</b> TFC Financial Management 30 Federal Street (617) 210-6726	Lee CFP  Boston lmcgowan@tfcfinancial.com	MA 02110

**Full Member - New**  
Financial Planning (FP)

**Full Member - New**  
Accounting (A)

**Associate Member - New**  
Wealth Management (WM)

**Full Member - New**  
Trust & Estate Law (TEL)

**Full Member - Renewal**  
Trust & Estate Law (TEL)

**Full Member - New**  
Wealth Management (WM)

<i>Member</i>	<i>Company</i>				
<b>O'Neil</b>	David				<b>Associate Member - New</b>
Story Trust Publishing, LLC					<b>Other (O)</b>
36 Floral Street	Newton	MA	02461		
(617) 755-3283	david@storytrust.com				
<b>O'Neil</b>	Alisa	Esquire, Trust Offi			<b>Vice Chair</b>
Loring, Wolcott & Coolidge					<b>Full Member - Renewal</b>
230 Congress Street, 12th Floor	Boston	MA	02110		<b>Trust Administration (TA)</b>
(617) 622-2236	aoneil@lwcotrust.com				
<b>Wallack</b>	Edward	Esquire, CLU, ChF			<b>Full Member - New</b>
Sapers & Wallack					<b>Life Insurance (LI)</b>
275 Washington Street, Suite 205	Newton	MA	02458		
(617) 225-2600	ewallack@sapers-wallack.com				
<b>Weeks</b>	Anita	CFP			<b>Chair</b>
Northern Trust					<b>Full Member - Renewal</b>
One International Place - Suite 160	Boston	MA	02110		<b>Trust Administration (TA)</b>
(617) 235-1823	Penny.Weeks@ntrs.com				
<b>Total Attendee</b>	<b>10</b>				