



Our History...

The Council, the first in the United States, was established in 1930 as the "Boston Life Insurance and Trust Council". It was essentially the brainchild of Basil Collins, then a trust officer at the Old Colony Trust Company, who nursed the organization through its infancy.

This voluntary association was (and still is) advisory in character without power to bind its members to any action or position suggested by vote of its membership. The earlier Articles of Association limited membership in the Council to representatives of banks with active trust departments and representatives from the life insurance profession.

In 1960 the name was changed to the "Boston Estate and Business Planning Council" and the membership base was widened to admit, along with insurance and trust representatives, attorneys-at-law and certified public accountants who were practicing in the estate and business planning field. The Articles of Association were amended accordingly to recognize the broadening of eligible professions for membership. The state purpose of the association was modified to more particularly describe the resolve of the membership to promote cooperation, respect, and understanding among the disciplines represented. Once again, in 1986, the Council changed its name from the "Boston Estate and Business Planning Council" to the "Boston Estate Planning Council". The name change did not mean that the Council was ignoring business planning, but instead conforming the name with that of other Councils around the country. Also, it reflects the broadening aspect of estate planning to encompass all forms of planning for an estate rather than a narrow definition which must be expanded to include the business aspects of an individual's estate.

The Boston Estate Planning Council took historical steps in May of 2008 and embraced clearly defined criteria to attract new members, retain our current members and give this highly sophisticated estate planning professional organization a platform to move into the 21st Century. The BEPC has expanded the membership criteria to reflect the practice dynamics of today's estate planning environment. We have increased the number of degrees and/or credentials that will allow professionals, directly involved in estate planning, FULL membership in The Council.

The business of The Council is transacted in large measure by its Board of Directors. Composition of the Board is balanced by a member representative of all the professions, each member serving three years to provide continuity of interest and experience.

The Boston Estate Planning Council records its formation date as September 11, 1930 and seems to be unchallenged as the Estate Planning Council with the longest history of continuous operation. Other Estate Planning Councils have antecedents in the 1930's but have not been active continuously since then. Many of these were reestablished in the late 1940's and early 1950's.

Ten Estate Planning Councils list their formation in the 1930's:

- 1930 Boston, Massachusetts
- 1934 Rochester, New York
- 1936 Denver, Colorado; Eastern New York (Albany); Connecticut (New Haven)
- 1937 Atlanta, Georgia; Baltimore, Maryland
- 1938 Chicago, Illinois; St. Louis, Missouri
- 1939 Pittsburgh, Pennsylvania

Another 25 Councils began in the 1940's:

- 1940: Buffalo, New York; Cleveland, Ohio; Milwaukee, Wisconsin; Seattle, Washington; Washington, DC
- 1941: Indianapolis, Indiana; Los Angeles, California; Philadelphia, Pennsylvania
- 1942: Northern New Jersey
- 1944: Cincinnati, Ohio
- 1945: Charlotte, North Carolina; Dallas, Texas; Detroit, Michigan; Tacoma, Washington
- 1947: Fort Wayne, Indiana; Houston, Texas; Western New York (Buffalo)
- 1948: Beaumont, Texas; Des Moines, Iowa; Louisville, Kentucky; Richmond, Virginia; Roanoke, Virginia
- 1949: Corpus Christi, Texas; Long Island, New York; Miami, Florida