

**OFFICERS 2016-2017**

**President**

**Joseph Powers, CFP, CLU®**  
UBS Financial Services  
Tel: (207) 791-5372  
[joseph.powers@ubs.com](mailto:joseph.powers@ubs.com)

**Immediate Past President**

**Jennifer L. Kruszewski, Esq.**  
Epstein & O'Donovan, LLP  
Two Monument Sq.  
Portland, Maine 04101-4036  
Tel: (207) 772-4100  
[jennifer@willsandtrusts.com](mailto:jennifer@willsandtrusts.com)

**Vice President**

**Robin L. Cyr, CPA, MST, JD**  
Albin, Randall & Bennett  
130 Middle Street  
Portland, ME 04101  
Tel: (207) 772-1981  
[rcyr@arbcpa.com](mailto:rcyr@arbcpa.com)

**Treasurer**

**Kerry Peabody, CSA, CLTC**  
Clark Insurance  
2385 Congress St, PO Box 3543  
Portland ME 04104-3543  
Tel: (207) 523-2253  
[kpeabody@clarkinsurance.com](mailto:kpeabody@clarkinsurance.com)

**Secretary**

**Timothy W. Woodhouse, JD, CPA**  
Acadia Trust, N.A.  
Tel: (207) 619-8623  
[twoodhouse@acadiastrust.com](mailto:twoodhouse@acadiastrust.com)

**DIRECTORS**

**Kenleigh Nicoletta, Esq.**  
Bram & Isaacson  
Tel: (207) 786-3566  
[knicoletta@bramlaw.com](mailto:knicoletta@bramlaw.com)

**Rebecca A. Burchill, CLU®, ChFC®**  
Lebel & Harriman LLP  
Tel: (207) 773-5390  
[rburchill@lebelharriman.com](mailto:rburchill@lebelharriman.com)

**David Martines, CPA**  
Harris & Vickers, P.A.  
Tel: (207) 781-3391  
[dmartines@hvcpa.com](mailto:dmartines@hvcpa.com)

**Michelle R. Santiago, Esq., CFP**  
H.M. Payson  
Tel: (207) 772-3761  
[mrs@hmpayson.com](mailto:mrs@hmpayson.com)

**Donna M. Temple, CTFP**  
People's United Bank  
Tel: (207) 828-3157  
[donna.temple@peoples.com](mailto:donna.temple@peoples.com)

**Remy Vazquez, JD, CPA**  
Baker Newman Noyes  
Tel: (207) 791-7528  
[rvazquez@bnncpa.com](mailto:rvazquez@bnncpa.com)

**Karen True Winslow, CFP, ChFC**  
Wintergreen Financial Group  
Tel: (207) 775-0282  
[karen@wintergreenfinancialgroup.com](mailto:karen@wintergreenfinancialgroup.com)

# MAINE ESTATE PLANNING COUNCIL

## Breakfast Meeting Notice

Date: January 19<sup>th</sup>, 2017

Place: Portland Country Club

Time: 7:30 AM Breakfast / 8:00 AM Program

Topic:

**Panel Discussion**

**Fiduciary Administration**

Please join us for a breakfast meeting on fiduciary administration. We are excited to have a panel discussion focusing on the legal, tax, and administrative aspects of unique assets held in Trusts.

An important component of Trust administration is the continued management of the underlying investments. Trustees are guided by the terms of the Trust, and state law in making investment related decisions. At times, Trusts will hold unique assets or concentrated positions. The panel will review the legal, administrative, and tax issues that arise in these circumstances. Timothy Woodhouse will serve as moderator. The panel will be comprised of the following:

### Panel Members

**Lauren Epstein** is a Senior Trust Officer with Camden National Wealth Management ("CNWM"), working closely with individual clients and beneficiaries of trusts for which CNWM serves as Trustee. Prior to joining CNWM, Lauren was an estate planning and elder law attorney, where she focused her practice on developing and drafting comprehensive estate plans, gift and estate tax planning, probate administration and disability planning. Lauren serves on the executive board of VNA Home Health & Hospice and is a member of the Board of Trustees of Mercy Hospital.

**Karen Hart** is the Fiduciary Services Administrator for LeBlanc & Young. She is responsible for coordinating the firm's fiduciary services, including estate and trust administration and all tax

*Peter Richardson, CFP*  
*R.M. Davis*  
*Tel: (207) 774-0022*  
*prichardson@rmdavis.com*

*Eliza Nichols, JD*  
*Leblanc & Young*  
*Tel: (207) 772-2800*  
*enichols@leblancyoung.com*

returns. Karen graduated from the University of Maine with a degree in Business Administration / Finance, earned her MS in Taxation from Thomas College, and received her CPA certificate in 1999. Prior to joining LeBlanc & Young, Karen worked for over 25 years in public accounting.

**Michael Currie** is President and a Managing Director of H. M. Payson & Co., a Maine Trust Company and Registered Investment Advisor. Prior to this, Mike was a partner in the law firm of Pierce Atwood. He received his undergraduate degree from Colby College, his law degree from The University of Maine School of Law, and an L.L.M. (Taxation) from Boston University School of Law. Mike is a fellow of the American College of Trust and Estate Counsel and a member of the American Bar Association and Maine State Bar Association.

**Nelson Toner** is a member of Bernstein Shur's Trusts and Estates, Real Estate, and Business Law Practice Groups. He focuses on international, federal and state tax planning, business succession planning, and estate planning. Nelson counsels individuals on estate planning matters such as the use of revocable and irrevocable trusts, gift planning, family limited partnerships and limited liability companies. Nelson is recognized by *Best Lawyers in America* for his tax work.