Origins & Testimonials

**Origins of the Estate Planning Council of Rochester**

During the late 1920's and early 1930's it became apparent to trust officers in the banks and to life underwriters that clients were not being served adequately due to a lack of cooperation between the two groups.  Boston had organized a Life Insurance Trust Council on September 11, 1930.

In Rochester in 1934 John W. Remington, Esq. was Vice President and head of the Trust Department of Lincoln-Alliance Bank and Trust Company, William H. Stackel was Senior Vice President and head of Trust Department of Security Trust Company, Nels Lengeman was Vice President and head of the Trust Department of Union Trust Company and R. Reed George was Vice President and head of the Trust Department of Central Trust Company, Mr. Frank W. McChesney was President of the General Agents and Managers Association and Ellen Putnam was President of the Rochester Life Underwriters, Inc.

These persons, plus several other trust officers and life underwriters, attended a meeting on May 24, 1934 to organize a Life Insurance and Trust Council.  John W. Remington invited Mr. Basil Collins, Trust Officer of Old Colony Trust Company in Boston, to tell us how effective Boston's Council had been.  Boston was the first Council in the country, Rochester, the second, followed by Syracuse in 1935, Portland, Maine, Atlanta, Georgia and Baltimore in 1937, Chicago in 1938, Pittsburgh in 1939, and Seattle, Milwaukee, Cleveland and Buffalo in 1940.  Thereafter the organization of Life Insurance Trust Councils was rapid.

Rochester alternated officers between life underwriters and trust officers. In November 1939 the name was changed from The Life Insurance Trust Council of Rochester to the Rochester Life Insurance and Trust Council.

Gradually, Life Insurance Trust Councils throughout the country became aware that the public needed not only cooperation between life underwriters and trust officers, but also cooperation between the four professions concerned with estate analysis and planning, namely, attorneys, certified public accountants, trust officers and life underwriters.

At the March 4, 1957 meeting of the Board of Directors of the Rochester Life Insurance and Trust Council it was agreed to invite fifteen attorneys selected by the Board to join the Council.  March 29, 1957 an invitation was sent to attorneys:  John H. Berman, Nicholas E. Brown, Anthony L. Dividio, Alfred W. Dunbar, John S. Gilman, Donald R. Harter, George H. Hawks, Jr., E. James Hickey, Lathrop Marsland, P.D. Oviatt, Jr., Frederick W. Post, Sydney R. Rubin, John G. Shaw, Donald S. Westfall and Howard M. Woods.  All accepted the invitation.  In 1958 the Board of Directors invited four Certified Public Accountants, all of whom accepted the invitation, namely Otto Schultz, Charles Clapp, Stanley Dye and Paul Zaenglein.

In 1958 the name was changed from the Rochester Life Insurance and Trust Council to the Estate Planning Council of Rochester.  A new set of by-laws was adopted.

In 1998 the Estate Planning Council acknowledged five different professions for membership.  Those five professions are: estate attorneys, life underwriters, financial planners, bank trust officers and accountants.  These five professions make up the current board of directors as well as five additional members for the executive committee.

Each year the officers include a member from each of the five professions and except for an occasional resignation, each moves up from treasurer, to secretary, to second vice president, to first vice president, to president.  Since 1976, the Board has had the services of an Executive Secretary, which has made the work much easier for the elected officers and insures continuity.

Membership is by invitation to those persons in each professional group who are engaged in trust and estate analysis, administration and planning.  A new member is proposed by two current Council members, one from his discipline and one from another of the disciplines represented in the Council.  Presently the membership is limited to 230 regular members.

When a person resigns or becomes 65 and attains Senior Member status another person is approved to fill his or her place as a Regular member.  There is no limit, however, on the number of retired members.