

**In preparation for the EPC Annual meeting on May 21, 2024  
at Irondequoit Country Club- Members are hereby notified of the nominations  
and elections for 2024-2025 Estate Planning Council of Rochester Board**

ARTICLE VII- NOMINATIONS

The President shall, at least twenty (20) days prior to the date of any annual meeting, appoint a committee of five (5) members, one representing each of the following categories of Executive Committee members: (a) trust officers or fiduciary officers of a bank or trust company, (b) attorneys, (c) life insurance agents or representatives or chartered financial consultants, (d) accountants, and (e) financial planners, to submit a list of nominees for officers of the Council and for members of the Executive Committee, to be acted upon at the annual meeting.

Such committee shall file the names of its nominees with the Secretary at least ten (10) days before the date of the annual meeting. In addition, any seven (7) members, by notice in writing filed with the Secretary at least two (2) days before the date of the annual meeting, may nominate candidates for officers of the Council and for members of the Executive Committee. The members of the Council shall be entitled to vote at such annual meeting for any candidates named by either of the above methods. The candidate receiving the majority of votes from the members present shall be declared elected.

Here are the nominations confirmed by the Board of Directors for 2024-2025.

**Executive Board**

**Clemons, Barbara, CFP President**  
**Kleehammer, Victoria, CPA 1st Vice President**  
**Marchese, Jr. Richard, ESQ 2nd Vice President**  
**McNaughton, Michael, CLU Secretary**  
**Donnelly, Diane Dolly, BTO Treasurer**  
**Caton, Maria, CFP Past President**

**Class of 2027**

**Compitello, Serena, ESQ**  
**Whiting, Lauren, CTFA**  
**Stork, Erica, CPA**  
**Estabrooks, Natalie, ChFC**  
**Rinaudo, Megan, CFP**

