
Women's Estate Planning Council Denver, Colorado



Member Involvement Handbook 2011 / 2012



Index

History & Mission	Page 3
Past Presidents	Page 4
Message from the President	Page 5
Officers	Page 6
General Information for All Committees	Page 7
Committees	
Membership	Pages 8-10
Programs	Pages 11-12
Hospitality	Page 13
PR/Community Outreach	Pages 14-15
Liaison to N.A.E.P.C.	Page 16
Member involvement form	Page 17
Meeting Dates for 2010/2011 Year	Page 18

History

The Women's Estate Planning Council was founded in 1995 by a group of dedicated professional women who wanted to establish a forum for women to pursue and develop their expertise in the estate planning field by creating a multi-disciplinary Council to share technical expertise, celebrate professional success and interact collaboratively and socially in the pursuit of serving our client families.

Mission

To promote interaction between women estate planning professionals; educationally, professionally and socially.

Women's Estate Planning Council Past Presidents

Below is a list of the Presidents who have led the Council and helped foster an environment of education, professional development and friendship. Without their leadership and the support of the many volunteers who serve on the Board and committees, WEPC would not be the recognized leader in providing professional women a multi-disciplinary forum for the development of their craft.

1995	Carol Williams Craigie
1996	Heather Rumsey
1997	Julie Gunkel
1998	Sheri DiPaglia
1999	Natasha O'Flaherty
2000	Jan Crewes-Jones
2001	Amy Locke
2002	Elaine Carleton
2003	Sharon Judd Englert
2004	Carrie Steinert
2005	Julie Gunkel
2006	Erica Johnson
2007	Nora E. Roth
2008	Kimberly L. Curtis
2009	Catherine E. Schwartz
2010	Darla L. Daniel

MESSAGE FROM THE PRESIDENT

Myra Donovan

The Women's Estate Planning Council is fortunate to have talented, enthusiastic and committed individuals join the ranks. These attributes are nurtured through active participation and involvement on our committees. Please consider how you can share your gifts and passions to enhance the experience.

I am excited about the new year and honored and humbled to serve as President!



President

Myra Donovan, CFP®, CLU, ChFC
Eagle Strategies, LLC
3200 Cherry Creek Drive South
Suite 700
Denver, CO 80209
B: 303-871-7249
F: 303-698-9530
E: medonovan@ft.newvorklife.com

Women's Estate Planning Council Officers



Vice President

Connie Smith
Fairfield and Woods, PC
1700 Lincoln St., Ste. 2400
Denver, CO 80203
B: 303-864-4474
F: 303-830-1033
E: csmith@fwlaw.com



Treasurer

Heidi Mourning, CPA
GHP Horwath, PC
1670 Broadway, #3000
Denver, CO 80202
B: 303-831-5000
F: 303-831-5032
E: hmourning@ghphorwath.com



Secretary

Kristin Piñeiro
Wallace Scott, PC
1430 Larimer St, #208
Denver, CO 80202
B: 720-457-6131
F: 303-586-4689
E: kpineiro@wallacescottlaw.com



Immediate Past President

Darla L. Daniel, Esq.
Colorado State Bank and Trust, N.A.
1600 Broadway, 3rd Floor
Denver, CO 80202
P: 303-864-7209
F: 303-864-7219
E: ddaniel@csbt.com

General Information for All Committees

- Volunteers are needed across all disciplines to serve on the various WEPC committees.
- Volunteers do not need prior WEPC experience in order to serve on, or chair a committee.
- Expectations of volunteers include regular attendance at WEPC monthly meetings, where volunteers are expected to serve as “ambassadors” of the WEPC, welcoming visitors and new members and helping to make introductions.
- Time commitment for volunteers will vary, depending upon the committee and the responsibilities involved. A minimum time commitment includes monthly meeting attendance and follow through on assigned committee responsibilities and duties. Volunteers should plan to serve for a two-year term.

Membership Committee

Purpose

The purpose of the Membership Committee is to increase awareness of, and involvement in the WEPC.

- One of the goals of this committee is to improve member retention, as well as increase the number of new members. Regular contact should be made with existing members in some sort of organized “outreach” program to improve retention and attendance at meetings, and to ask for referrals of potential new members. Timely follow-up with visitors should be done to answer questions, and explain membership benefits and application process.
- The membership committee will assist the WEPC President in finding ways to generate interest in serving on committees and on the WEPC Board. This committee will be responsible for educating members about the roles and responsibilities of each committee and Board positions through a Member Involvement Handbook. This committee will also communicate with the Webmaster (currently Valerie Miller) on maintaining the membership application and to track new member interest in volunteering, and coordinate with the appropriate committee of interest.
- This committee should work closely with the PR/Community Outreach Committee to make sure that new members are welcomed in the monthly newsletter, and to ensure that awareness about WEPC events is being publicized to prospective members.
- The Membership Committee is responsible for posting signs/directions to meeting space, organizing member and visitor sign-in, the collection of visitor fees, and providing nametags for monthly meetings. This committee is also responsible for explaining the application process to visitors and prospective members.
- Maintain the member business card directory notebook and distribute/display at all meetings.
- Recruit weekly greeters to help introduce visitors to other members so they feel comfortable and welcome.

Membership Committee, cont.

Goals

The goals for the next year include the following:

- The yearly update of the WEPC Member Involvement Handbook, which outlines the different committee opportunities
- The development of a mentor outreach system to communicate with new and existing members to help strengthen and retain WEPC membership and facilitate ways to get members involved
- The development of member surveys to improve communication and feedback to WEPC

Expectations of Volunteers

Volunteers will attend committee meetings and actively participate in committee activities. Volunteers are expected to be "Ambassadors". They can also bring two free guests per year to any WEPC event.

Time Commitment

The committee meets during the months of August through May.

Length of Service

Two year commitment.

Membership Committee, cont.

Membership Committee



Co-Chair

Lisa V. Perry, Esq.
Welborn Sullivan Meck & Tooley, P.C.
821 17th Street, Suite 500
Denver, CO 80202
B: 303-830-2500
F: 303-832-2366
E: lperry@wsmtlaw.com



Co-Chair

Cheryl Swanson, FLMI
AXA Advisors, LLC
1675 Broadway, Suite 1700
Denver, CO 80202
B: 720-946-4408
F: 303-893-8912
E: cheryl.swanson@axa-

Program Committee

Purpose

The purpose of the Program Committee is to schedule programs for monthly WEPC meetings. This committee is responsible for determining appropriate topics, then identifying and scheduling competent speakers.

- This committee should solicit program feedback, as well as input for future topics of interest, from WEPC members through the use of an evaluation form to be distributed and collected at monthly meetings.
- Other duties include corresponding with presenters to confirm date and time of presentation and provide directions to the meeting location, and communicating with presenter regarding AV equipment and set expectations around number of members/guests expected to be in attendance and who is responsible for making copies of handouts.
- Follow-up with a Thank You note to the presenter of the monthly program.
- This committee also corresponds with WEPC Webmaster (Currently Valerie Miller) to make sure that programs are posted on the Events Calendar on the website, reminder notices are sent out via email, and RSVP totals are shared with the presenter so the appropriate number of handouts can be provided.
- This committee coordinates with the PR/Community Outreach Committee to provide program information for the monthly newsletter, as well as other local area publications announcing upcoming WEPC meetings (e.g. Denver Business Journal, Denver Woman Magazine, etc.).
- When appropriate, this committee gathers and submits requirements necessary to obtain approval for continuing education credits for WEPC members (Attorneys, Accountants, and Financial Advisors). Documentation must be submitted no later than 60 days prior to program date in order to secure continuing education credits.

Expectations of Volunteers

Volunteers will attend monthly WEPC meetings and actively participate in committee activities.

Time Commitment

The committee meets approximately three to four times a year, in person or by telephone conference.

Program Committee, cont.

Length of Service

Two year commitment.

Program Committee



Chair

Arlene Barringer
Glatstein & O'Brien, LLP
2696 S. Colorado Blvd., #350
Denver, CO 80222
P: 303-757-4342
F: 303-757-4570
E: Arlene@denverprobatelaw.com

Hospitality Committee

Purpose

The Hospitality Committee is responsible for obtaining refreshments for monthly meetings.

- Provide beverages (wine, water, soft drinks and cups) for monthly meetings
- Coordinate with caterer regarding total RSVP's each month
- If catering is unavailable, arrange for food to be delivered from a restaurant

Expectations of Volunteers

Volunteers will attend WEPC meetings and provide abundant beverages.

Time Commitment

The committee meets as needed.

Length of Service

Two year commitment.

Hospitality Committee



Chair

Sonia Desai, CPA
RGL Forensics
5619 DTC Parkway, #1010
Englewood, CO 80111
B: 303-721-8898
E: sdesai@us.rgl.com

Public Relations / Community Outreach Committee

Purpose

The committee oversees the public relations and community outreach aspects of the Women's Estate Planning Council in order to create awareness.

Duties include but are not limited to:

- Maintain a current listing of phone numbers and email address of contacts for financial, accounting and legal news organizations to advertise monthly meetings.
- Keep in touch with the Program Chair as to upcoming speakers, times and dates at the beginning of each month, faxes and/or emails information for the next three months programs to each contact if known.
- Promote the WEPC by issuing press releases of members' accomplishments.
- Organize special events to promote the WEPC (e.g. Ronald McDonald House or Habitat for Humanity, etc.)
- Maintain, update and expand photo album with member and event photos.
- Contact different law and accounting firms to inform the women attorneys and CPA's of our organization and to notify them of the upcoming meetings.

Volunteers Needed

Committee membership is open to WEPC members with an interest in marketing, public relations and/or business development.

Expectations of Volunteers

Volunteers are expected to actively participate in all meetings and conference calls.

Time Commitment

There are typically two meetings per year primarily between August and May to evaluate existing initiatives and discuss new ideas for the upcoming year. There are additional conference calls and email discussions as needed

Length of Service

One year commitment.

Public Relations / Community Outreach Committee, cont.

Public Relations/Community Outreach Committee



Co-Chair

Stefanie M. Deters
Goodspeed & Merrill
7000 E. Belleview Ave., #355
Greenwood Village, CO 80111
B: 720-473-7645
E: sdeters@goodspeedmerrill.com



Co-Chair

Karen M. Cecile
Financial Designs, Ltd.
1775 Sherman St., #1800
Denver, CO 80203
B: 303-832-6100
E: kceclie@fdltd.com

Liaison to National Association of Estate Planners & Councils (NAEPC)

Purpose

The liaison provides updates on the benefits offered by the NAEPC to WEPC members, serves as the contact person for information coming from the NAEPC and discusses the renewal of the membership annually with the WEPC Board.

Responsibilities include:

- Provide a current membership list to the NAEPC.
- Provide the membership with information on the benefits offered by the NAEPC.
- Promote the Accredited Estate Planner designation available through the NAEPC as recommended by WEPC.
- Provide assistance to any member who needs help in obtaining the membership login information or any other information from NAEPC.



Liaison

Nora E. Roth, Esq.
Colorado State Bank & Trust
1600 Broadway – Trust Dept
Denver, CO 80202
B: 303-864-7226
F: 303-864-7219
E: nroth@csbt.com

Member Involvement Form



Leadership Opportunities

The WEPC offers opportunities for you to develop your leadership skills. If you are interested in becoming a leader in the Women's Estate Planning Council call Myra Donovan, President, at 303-871-7249, or call Lisa Perry, Membership Co-Chair, at 303-830-2500.

If you are interested in becoming more involved in the WEPC,
PLEASE RANK YOUR 1st, 2nd and 3rd CHOICE

For a description of each opportunity, please review the Member Involvement Handbook at www.WEPC.net

___ Membership

___ Hospitality

___ Programs

___ Newsletter

___ Public Relations / Community Outreach

My name is _____

Contact me by phone at _____

Contact me by email at _____

Meeting Dates for 2011/2012 Year

The WEPC meets the 2nd Thursday of every month except for December. Following are the dates:

June 9, 2011

July 14, 2011

August 11, 2011

September 8, 2011

October 13, 2011

November 10, 2011

January 12, 2012

February 9, 2012

March 8, 2012

April 12, 2012

May 10, 2012

Women's Estate Planning Council

www.wepc.net

