Women's Estate Planning Council

Newsletter

MAY 2020

WEPC Mission:
To promote interaction between women estate planning professionals educationally, professionally and socially.

President's Message

Hayley Lambourn
Wade Ash Woods Hill & Farley, P.C.

Wow, what an interesting and challenging few months! I hope that everyone is staying healthy and adjusting to our "new normal" by sheltering in place and taking other precautions to protect our peers, loved ones, and community. As our communities begin to reopen, the WEPC board continues to monitor local guidelines that are applicable to our gatherings to assess whether or not it is appropriate to meet in person. Until we are able to meet again in person, we intend to hold our meetings online. Please check for updates regarding our meetings on our website and monthly evites.

The end of another WEPC year is also upon us. As we cast our votes for newly slated board members, I would like to take a moment to thank the outgoing board members for their dedication and volunteer hours and to reflect on all that we accomplished this year. Five members attained their AEP© designation. We continued to build our networks through participating in the Business Card challenge and learning more about one another at our annual Galentine's Day networking event and Holiday celebration at Osteria Marco. We also enjoyed informative programming from our annual tax presentation to our most recent presentation regarding social security and the SECURE Act.

We began the year with a membership survey. Each of you provided us with wonderful suggestions and feedback on how we can continue to build and improve our organization. During this uncertain time, I encourage you to continue to reach out to the board with your recommendations and concerns. I look forward to seeing each of you sooner rather than later!

It's that time of year again!
Dues for 2020-2021 membership in Women's Estate Planning Council are due in May 2020. You can pay your $200 annual dues by check or go online to the website at: www.wepc.net/membership.html to renew your membership.

Don't forget to vote for our new 2020-2021 WEPC Board Slate that was emailed to members on May 1st!

Galentine's Day Networking Event
February 13, 2020

We had a great turnout for our 2nd Annual Galentine's Day Networking Event sponsored by Oasis Senior Advisors. We had a mix of activities for members to get to know each other both professionally and personally. Thanks for everyone who joined us!

oasis
SENIOR ADVISORS®
Because the **right place** means everything

Pictured above (top row, left to right): Holly VandeHoef, Jenny Mattie and Sara Bucar
(bottom row, left to right): guest, Theresa Cashman and Kim Raemdonck

Pictured left: Daphne Jean, Kelly Collins, and Lisa Theard

Pictured left: Barbara Ross and guest

Pictured above (left to right): Angela Herrick, Anne Sherwood, Melanie Palmer and Lisa Kukura

Pictured right: Tara Henderson and Elizabeth Savage

Congratulations to our members with the Accredited Estate Planner® (AEP) designation.

KAREN BRADY, J.D.

I am an attorney with a J.D. from the University of Michigan Law School and the Accredited Estate Planner designation. My Business name is Law Offices of Karen Brady, P.C.

I practice in estate planning and business planning, while others in my firm practice estate and trust administration and have been practicing law since 1991, so I guess that means we are coming up on 29 years! Oh my goodness.

I was a member of the WEPC back in the early 2000s, then I let that lapse for a while and became a member again in 2018.

Being an Accredited Estate Planner means that my career focus and accomplishments have been recognized by peers whose opinion I respect. Several of my mentors are or were AEPs so it is gratifying to be able to join their ranks.

JENNE TREMBLEY,
CFP®, ChFC®, AEP®, CAP®, APMA®, CRPC®, CDFA®, BFA™

I work for Ethos Financial Partners, a private wealth advisory practice of Ameriprise Financial Services, LLC and as a financial advisor, I provide wealth management and comprehensive financial planning advice services, but my passion has always been estate and tax planning, including small business planning, intergenerational planning, charitable giving, and estate settlements.

I've been practicing for 14 years and have been a part of WEPC since 2014 or 2015.

The Accredited Estate Planner designation helps me better demonstrate my knowledge and expertise in my area of focus. More importantly, I hope this additional education, coupled with my Chartered Advisor in Philanthropy (CAP) designation, may help me better serve my clients and their families to fulfill their wishes, create a legacy, and perpetuate their values. I want to make a positive difference in the lives of my clients and help bring their dreams to fruition.

DENISE CALKINS-YOUNGQUIST, CFP ®, AEP ®

My business is Calkins-Youngquist Financial Life Planning; areas of practice are financial planning and asset management with a focus on women and multi-generational planning.

I have been practicing 11 years as of March – I gave notice to my last employer on March 9, 2009, the day the market hit its all-time low! I've come full circle in the last decade.

I've been involved with WEPC since 2015.

The AEP designation is a further extension of my commitment to provide holistic financial life coaching. It demonstrates my ability to address legacy planning with clients.

MELISSA DYER,
CFP®, AEP®, MBA

I am a CERTIFIED FINANCIAL PLANNER™ professional with Raymond James Financial Services, Inc. I offer comprehensive financial planning to individuals and multi-generational families. I specialize in the areas of investment management and advisory services; retirement planning, income and distribution strategies; and estate and wealth transfer plans.

I have been in practice as a financial advisor for 24 years, and have been involved with WEPC for over 10 years.

It is an honor to be recognized as an Accredited Estate Planner® by my colleagues. The AEP® designation provides me the credentials to demonstrate my expertise and my ongoing commitment to collaborate with other estate planning professionals to provide well-suited trust and estate planning services to my clients.

***Change to Council-Nominated Accredited Estate Planner®* Designation Program**

There has been an exciting change to the Accredited Estate Planner® (AEP®) Council Nomination Program! Effective January 1, 2020, the minimum experience requirement for council nominees was reduced from 15 to 10 years. This change may open the door for previously unqualified members of your council to be considered for a council nomination. Learn more on the NAEPC website. (*This change does not apply to self-nominating applicants*.)

Member Spotlight

Kim Raemdonck

What is your current position and what do you like most about it?

I recently opened my own law firm practicing primarily in the areas of estate planning and probate administration. I really love the freedom of making my own schedule, practicing in the areas of law that I am passionate about, and being able to spend more time with my family.

Tell us a bit more about you and your life outside the office.

I have been married to my husband, Dieter, for almost seven years. We were in the same section our first year in law school and he works as a lobbyist. We have a daughter, Stayton, who just turned two and keeps us very busy, as well as two very lazy golden retrievers. We love to ski, travel, try new restaurants, and spend time with friends and family.

What other organizations, volunteer positions or non-profits are you involved with; or what boards do you serve on?

I have been involved with the Junior League of Denver for about seven years. The Junior League of Denver is a women's training organization that develops civic leaders committed to improving the community. I am currently part of the Junior League Foundation's Philanthropy Committee. I am also involved with the Trusts & Estates Section of the Colorado Bar Association and was the chair of the Orange Book Form Committee last year. I am also a member of the Endowment Board of the Denver Ballet Guild.

Are there any professional or personal aspirations you are working towards that you would like to share?

Having just opened my own my firm, my primary goal is to continue to grow my business, maybe to even add staff and additional attorneys at some point. I plan to continue to expand my network with other attorneys and individuals in related fields, develop new clients, and, as always, serve my current clients with the utmost professionalism. Finally, there is always more to learn in this area of practice and I am always open to and excited about learning from others.

What attracted you to WEPC and/or what are you hoping to get out of your involvement with this fabulous group?

I joined WEPC right after law school at the encouragement of Erica Johnson. I was so impressed by all of the strong, successful women. I also felt like WEPC was so welcoming and inclusive to its new members. Many of the women I've met in WEPC have become great friends of mine and I am very grateful to WEPC for bringing us together.

What expertise or experience do you have that could be particularly helpful to WEPC members?

In addition to a law degree, I also have an L.L.M. in taxation. I have experience filing tax returns, which I think gives me an added perspective when advising clients with regards to their estate planning and trust/probate administration needs.

****Please share a tip for use in their practice or daily life, or a quote or words of wisdom you have found useful/memorable.****

This was the quote I included in my high school yearbook senior year and I find it especially relevant to me during this season of my life:

"All our dreams can come true, if we have the courage to pursue them."
-Walt Disney

Winter Social at Osteria Marco
December 12, 2019

Jamie Mager, Kristin Dittus and Hart Axley

Pictured left to right: Melanie Palmer, Gina Trevey, Holly VandeHoef and Darla Daniel

Pictured above: Angela Herrick with her son Wallace Chase Herrick and Kayla Nelson

---

We want to thank our Gold Sponsor

BANK OF AMERICA

for our Annual Tax Update at our January meeting

We had a great turnout for our highly anticipated annual Tax Update! Pictured left, Cathie Asmus, CPA with Atlas CPAs and Advisors, formerly Coet 2 CPAs, PC presented to the group on 2019 and 2020 tax changes.

IRS CHANGES TAX FILING DATE TO

Member Spotlight

Jenny Mattie

What is your current position and what do you like most about it?

Senior tax manager at Moss Adams. I like the planning and working directly with my clients. I also like teaching my young staff.

Tell us a bit more about you and your life outside the office.

I am married with 3 kids. We enjoy traveling and boating.

Tell us about any recent articles you have published or plan to publish in the near future.

I am in charge of writing an article for our firm regarding regulations coming out to prevent private foundations putting money in Donor Advised Funds in order to meet their minimum distributions requirement. Waiting for the regulations to come out on it.

Tell us about a job you have held or are currently at that has had a big impact on you, either personally or for your career, and why.

I have been involved in estate planning and returns, which have made me think about my parents and me personally regarding estate planning. I love estates because each one is different and I always learn something new.

Are there any professional or personal aspirations you are working towards that you would like to share?

I am currently working on getting qualified to be our internal quality control reviewer for Trusts, estate, and gifts. Then after that working on becoming director or partner.

What attracted you to WEPC and/or what are you hoping to get out of your involvement with this fabulous group?

I love getting to know other professional women. The topics/presentations tend to be of interests to me and the members are a great fit in my career far as networking goes.

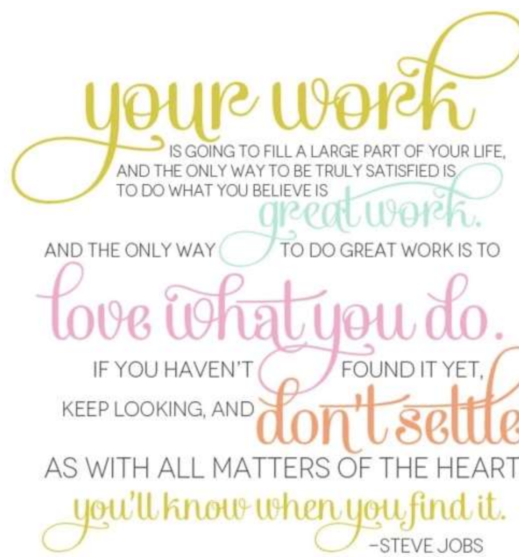
What expertise or experience do you have that could be particularly helpful to WEPC members?

I am a CPA and I specialize in Trusts, estates and gifts. I also do partnerships and foundations. I am pretty well rounded in my field.

Why were you drawn to work in your current line of work/field of expertise?

I originally was drawn to tax because it was interesting to see what kind of jobs people have and what kind of money they make. Now I love the whole estate planning and seeing how it all plays out at the end.

Here's one of my favorite quotes or words of wisdom I have found useful/memorable…



Member Happenings

Anne Zellner (now Anne Sherwood) got married on March 14, 2020!

Anne and her husband Brandon got married in Boulder and then took a mini-moon to Cap Cana, DR. Brandon is in finance and recently passed Level 1 of his CFA. "We are really excited to start this next chapter of our life!" Anne also started a new position as Assistant General Counsel at Xcel Energy this month.

WEPC Invites Members to submit articles and member happenings for publication in our newsletter.

Please send articles to Anda Pilmanis at agentanda@agentanda.com and/or Carly Wendt at carly.wendt@ml.com

Please review your listing on the WEPC Website and ensure your work and contact information is up-to-date! Complete the membership update form on our website it if has changed.

What is your Favorite Restaurant?

At our February Networking Event, we asked our members to share their favorite restaurant in town. Our world has drastically changed since February, but we wanted to list some of our favorite restaurants to remind us of how much we miss eating out at these restaurants and hopefully we can support them through take-out and when they are back open again!

Guard & Grace
Lil Ricci's in DTC
El Five
Fruition
Taste Thailand
My Kitchen!
White Pie
Matsuhisu
Sushi Den
North
Acres
240 Union
Wolf's Taylor
Abeja in Golden
Shells & Sauce
Buckhorn Exchange
Tables in Park Hill
The Plimouth in City Park
Domo
US Thai – order take out and eat at Joyride Brewery
Community in Louisville (great amaretto sours!)
Le Roux

Annual Slate for our 2020-2021 Board:

Newly Elected:
Vice President – Kim Raemdonck (3-year term to serve as Vice President, President and Immediate Past President, consecutively)
Secretary – Holly VandeHoef (1-year term)
Treasurer – Angelia McGill (1-year term)
Hospitality Co-Chair – Natalie Guard (2-year term)
Membership Co-Chair – Kayla Nelson (2-year term)
Programs Co-Chair – Shannon Tracey (2-year term)
Public Relations Co-Chair – Kelly St. George (2-year term)

Continuing in Their Terms:
President – Gina Trevey (already elected to 3-year term to serve as Vice President, President and Immediate Past President, consecutively)
Hospitality Co-Chair – Melanie Palmer
Membership Co-Chair – Anne Sherwood
Programs Co-Chair – RaQwin Young
Public Relations Co-Chair – Anda Pilmanis
Immediate Past President – Hayley Lambourn

Positions Appointed by the Board:
NAEPC Liaison – Jenne Trembley
Membership Ambassador – Lisa Theard

THANK YOU to our 2019 – 2020 WEPC Officers:

Hayley Lambourn, Esq. – President
Wade Ash Woods Hill & Farley, P.C.
hlambourn@wadeash.com

Gina Trevey, Esq., CTFA® – Vice President
AMG National Trust Bank
gmtrevey@amgnational.com

Holly VandeHoef, Esq. – Secretary
Bank of America
holly.vandehoef@bofa.com

Angelia McGill, CPA® – Treasurer
Wipfli LLP
angelia.mcgill@wipfli.com

Angela Herrick, Esq. – Immediate Past President
Herrick Law, LLC
angela@herrick-law.com

Committee Members:

Kayla Nelson, Esq. – Membership Co-Chair
Sigler Law Offices LLC
Kayla@siglerlawco.com

Anne (Zellner) Sherwood, Esq. – Membership Co-Chair
Xcel Energy
anne.z.sherwood@gmail.com

RaQwin Young, Esq. – Programs Co-Chair
The Law Office of RaQwin Young, LLC
ryoung@younglawgolden.com

Denise Calkins-Youngquist – Programs Co-Chair
Calkins-Younguist Financial Life Planning, LLC
dyoungquist@cambridgesecure.com

Kelly Collins – Hospitality Committee Co-Chair
Presidential Wealth Management
kcollins@presidentialwm.com

Melanie Palmer – Hospitality Committee Co-Chair
US Bank Private Wealth Management
melanie.palmer@usbank.com

Anda Pilmanis, Esq., Realtor – Public Relations Committee Co-Chair
AgentAnda LLC
agentanda@agentanda.com

Carly Wendt – Public Relations Committee Co-Chair
Merrill Lynch
carly.wendt@ml.com

Jenne Trembley, CFP®, ChFC®, AEP®, CAP®, APMA®, CRPC®, CDFA®, BFA™ – Liaison to National Association of Estate Planners & Councils (NAEPC)
Ethos Financial Partners
jennifer.k.trembley@ampf.com

Annual Dues!

It's that time of year again!
Dues for 2020-2021 membership in Women's Estate Planning Council are due in May 2020. You can pay your $200 annual dues by check or go online to the website at:
www.wepc.net/membership.html
to renew your membership.

If paying by check, the address is:
WEPC
P.O. Box 460666
Denver, CO, 80246

We look forward to seeing you at the next meeting which is virtual! We hope you and your families are staying safe and healthy.

May 14th Meeting!

Our next WEPC meeting is Thursday, May 14, 2020 at 5:30pm and will be our first ***virtual*** **WebEx meeting and presentation.**

Pease join us for a timely presentation on **The SECURE Act and CARES Act** and how this will have implications for taxes, retirement investments and estate planning for our clients. Our presenter is Ben Rizzuto, CRPS®, Retirement Director for Janus Henderson Investors. We look forward to seeing you there!

WEPC SPONSORSHIP

Please consider being a sponsor for one of our fantastic WEPC meetings. Opportunities are now available for our members.

Gold Level Sponsor: For our $500 Gold Level Sponsors, we offer the following benefits at one of our monthly meetings:

- Organization's name will be announced at the meeting as the sponsor.
- Organization's name and logo will be displayed at the meeting as the sponsor.
- Ability to place marketing materials at the sign-in table for members and guests or emailed if virtual meeting.
- 5-10 minutes to talk about your organization at the beginning of the meeting.
- Organization's name displayed on the home page of WEPC website for a year, in the meeting Evite and in the newsletters for the year.
- 4 meeting guest passes.

Silver Level Sponsor: For our $250 Silver Level Sponsors, we offer the following benefits at one of our monthly meetings:

- Organization's name will be announced at the meeting as the sponsor.
- Organization's name and logo will be displayed at the meeting as the sponsor.
- Ability to place marketing materials at the sign-in table for members and guests or emailed if virtual meeting.
- Recognition in the meeting Evite, newsletter and website.
- 2 meeting guest passes.

If you are interested or would like more information, please contact Anda Pilmanis, Public Relations Committee Co-Chair at agentanda@agentanda.com and/or Carly Wendt at carly.wendt@ml.com.

Please print and complete the sponsorship form directly to the Public Relations Committee Co-Chair responsible for sponsorships, as indicated on the form.

BANK OF AMERICA

Nationwide®

WEPC Online

Check out the WEPC website - www.wepc.net

1. Easy to use Member Directory. Use alphabetical or career specialty listings. Need an expert or referral partner? Go to the WEPC Member Directory!
*Has your contact information changed? Please review your listing under "Our Members" on the website and submit an update form if any of your contact information has changed.

2. Member Handbook is online. Ever wonder what certain board members do? Read the descriptions in the Member Handbook!

3. Submit Membership Application and pay dues online!

4. Please notify the membership committee if your name-tag needs to be updated.