



## Women's Estate Planning Council

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

### President's Corner

By Cathy Schwartz, CFP®, WEPC President

Over this past year, I have been excited to see so many new faces joining the Women's Estate Planning Council. We can all better serve our clients by having a strong network of professionals we can go to for help outside of our respective areas of expertise. And I'm so happy to see that our network continues to grow stronger and stronger. Being a part of the WEPC Board has strengthened my relationships with other members both personally and professionally, and has enhanced my experience with the group.

As we come to the end of our fiscal year, I would encourage anyone who is interested in getting more involved to step up and volunteer to serve in a leadership role. Please contact me at 720-940-1872 to discuss WEPC Board and committee opportunities available starting in May 2010.

Cathy Schwartz, CFP®, CDFA

WEPC President 2009-2010



WEPC members hang on Carol Wilson's every word during our November meeting on business valuation.



### RSVP Policy

In order to get an accurate food estimate for meetings, we MUST have RSVPs by the Tuesday before each meeting. Those who do not RSVP will be charged a \$5 at the door. Thank you for your understanding.

### Meetings

2<sup>nd</sup> Thursday of each month

Networking: 5:30 pm

Remarks: 5:50 pm

Program: 6:00 - 7:00 pm

Guest Fee: \$25.00—note new fee

No RSVP Fee: \$5

Light dinner served

Location: Galleria Building, 720 S. Colorado Blvd., Garden level conference room—north west corner of bldg. Park on the Bluebell level



### Programs

**April Meeting: Introduction to Denver Probate at the Denver Probate Court.**

Join us in a Denver courtroom as Jennifer Shaler, Esq. and Judge Jean Stewart explain protective proceedings, decedents' estates, mental health issues and trusts.

#### PLEASE NOTE THE CHANGE OF VENUE!

The Denver Probate Court is located in the Denver City and County Building, on the second floor.

The address is 1437 Bannock Street, Room 224, Denver, CO 80202.

From the elevator on the second floor, turn left. The Clerk's Office is at the end of the hall, on the right. Go past the Clerk's Office and make a right. The courtroom is at the end of the hall.

**May Meeting: Making Pro Bono Work For You**

The PR/Outreach Committee is putting on a panel discussion about how to incorporate pro bono work in to the practices of our three disciplines.

**June Meeting: To Be Announced.** Check out [www.wepc.net](http://www.wepc.net) for more information

**Quote of the Quarter:** Of the billionaires I have known, money just brings out the basic traits in them. If they were jerks before they had money, they are simply jerks with a billion dollars—Warren Buffett

### 2009-2010 Board Members

President	Cathy Schwartz 303-770-5511
Vice President	Darla Daniel 303-864-7209
Immediate Past Pres.	Kimberly Curtis 303-753-7578
Treasurer	Carol Wilson 303-421-4775 x49
Secretary	Kim Spaulding 303-407-8001 x327
Programs	Myra Donovan 303-871-7249
Programs	Pam Hesselgrave 720-947-6725
Membership	Mary Bock 303-333-3500
Membership	Dana Sandoval 303-640-2407
Public Relations	Leslie Karotkin 303-300-1790
Hospitality	Debbie Reinberg 303-268-2282
Website/Technology	Amy Berk 303-721-6055
Newsletter	Kristi Sullivan 303-324-0014

### Welcome, New Members

**Heidi Mourning** (CPA), GHP Horwath, P.C.  
**Jordan Ausman** (Associate Financial), Trilogy Financial Services  
**Maria Theresa B. Lopez** (Attorney), Glatstein & O'Brien LLP  
**Mary Beth Widegren** (CFP, CPA), CBIZ MHM  
**Pam Kerr** (CPA, CFE, FCPA), Kerr Forensic Accounting



### Good News From Kim Curtis of Wealth Legacy Institute!

Kim had an article published and selected as Editor's Choice for CCH Journal of Practical Estate Planning in the Feb/March 2010 issue called *The Picture That Tells a Family's Thousand Words*.

The article demonstrates how an organized pictorial depiction—called a genogram can aid the family and the planner in the process of family legacy planning. Several thought leaders have called the article groundbreaking!

### Flash Interview with Existing Member Sybil Praski

**What is the best or worst Valentine's Day gift you have ever received?** Best: I love cards and flowers. I'm traditional. Can't think of a bad one.

**Do you read for fun, or just for information?** Love to read for fun, but have to do a lot of research writing for work.

**How many times per week do you require chocolate?** I like chocolate, but it doesn't like me. It breaks me out.

**Do you have any fun trips or adventures planned for 2010?** I had a trip planned for South Africa this year for 3 weeks.

**What has the Great Recession taught you?** Always live within your means!

### Flash Interview with New (Returning) Member Carol Cragie

**What is the best or worst Valentine's Day gift you have ever received?** My husband wrote me a love poem a year after his stroke when he was 38. He had suffered brain damage and really struggled with writing then. He spent days on it. It had misspellings. It was only 4 lines but contained so much love. It surpasses all the flowers, dinner and gifts that have come since – (which, really roses once or twice are nice but \$60 bucks for something that is gone after a week and requires daily care and acting surprised?)

**Do you read for fun, or just for information?** For fun and daily but only stories with happy endings (I've had enough drama, pain and confusion with real life!)

**How many times per week do you require chocolate?** Don't you mean daily requirement? I have small pieces of dark chocolate stashed all over my office, bedroom and laundry room. I reward myself, console myself and generally indulge 3 – 5 times a day with little bites.

**Do you have any fun trips or adventures planned for 2010?** We've decided to conserve this year so other than visiting family, we aren't traveling but we have planned some fun adventures here in Colorado. We've rediscovered the joys of walking outside and searching for beauty in nature on a daily basis. After living in the Midwest the last few years, just being in Colorado sunshine brings joy to my heart! We're working our way up to some really long hikes this summer in the mountains.

**What has the Great Recession taught you?** Don't sweat (or buy) the small stuff and remember that happiness is inside. When my husband became disabled several years ago, I had my own great recession and learned to understand my own psychology of money. I learned to imagine the worst scenario and then figure out how to live with it. Where would I go if I was homeless, broke, and my grown kids were too! After imagining coping with that, reality isn't so bad.