



Women's Estate Planning Council

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

President's Corner

By Darla Daniel, Esq., Colorado State Bank and Trust

It is so gratifying to be part of the Women's Estate Planning Council.

It's been exciting to watch our group grow over the past several years, both in membership and in the sharing of ideas. WEPC serves many functions for us as professional women: social connections and friendships, networking to grow our businesses, and educational programs to help us navigate the challenges of estate planning for our clients. I know that I have benefited both personally and professionally from the connections I've made through WEPC – particularly through the network of people I can turn to as resources when an issue is outside my own area of expertise.

New members are always welcome, so mention WEPC to your friends and colleagues! I encourage each of you to take a look at our recently revised WEPC member handbook on the website (www.wepc.net), and get involved. We are always looking for speakers, help with programs and community outreach, and volunteers for subcommittee work. If you're interested in a leadership position, feel free to contact me or our Vice-President, Myra Donovan. I look forward to a great year with all of you.

Darla L. Daniel, WEPC President 2010-2011

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

2nd 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

We have lots of exciting programs in the works for the second half of the year. Look for e-vites to our upcoming programs. Also check www.wepc.net for updates.

Please contact Pamela Hesselgrave (see page 2 for phone numbers) if you are interested in speaking at a meeting. We'd like to hear from our members!



What are Your Customers Reading?

Top 5 Selling Books About Investing from Amazon.com



1. More Money Than God: Hedge Funds and the Making of a New Elite by Sebastian Mallaby
2. Rich Dad Poor Dad by Robert T. Kiyosaki
3. The Intelligent Investor: The Definitive Book on Value Investing by Benjamin Graham, Jason Zweig, Warren Buffet
4. Liar's Poker by Michael Lewis
5. The Millionaire Next Door by Thomas J. Stanley

Quote of the Quarter: "I have no use for bodyguards, but I have very specific use for two highly trained Certified Public Accountants." - Elvis Presley

2010-2011 Board Members

President	Darla Daniel	303-864-7209
Vice President	Myra Donovan	303-871-7249
Past President	Cathy Schwartz	303-770-5511
Treasurer	Heidi Mourning,	303-831-5032
Secretary	Kim Spaulding	303-407-8001 x327
Programs	Pam Hesselgrave	303-726-8856
Membership	Mary Bock	303-333-3500
Membership	Lisa Ludwig,	303-376-4476
Public Relations	Stefanie Deters,	303-866-0622
Public Relations	Karen Cecile,	303-832-6100
Hospitality	Debbie Reinberg	303-268-2282
Website/Technology	Amy Berk	303-721-6055
Newsletter	Kristi Sullivan	303-324-0014

Welcome New Members!

- **Melissa Dyer, CFP®**, Raymond James Financial Services, Inc.
- **Megan Brand**, Non-profit Trust Administrator, Colorado Fund for People with Disabilities
- **Michelle R. Canerday**, Attorney, Baker & Hostetler LLP
- **Taylor Yionoulis, MBA**, Hinds Financial Group



www.WEPC.net



Check out the following cool stuff on the new and improved WEPC website:

1. **Easy to use Member Directory.** Use alphabetical or career specialty listings. Need an expert or referral partner? Don't go to random networking events, go to the WEPC.net Member Directory!
2. **Member Handbook now online.** Ever wonder what certain committees or board members do? Read the descriptions in the Member Handbook!
3. **Pay dues and RSVP online!**

Thanks to Amy Berk for her hard work in re-launching the website!

Flash Interview with Taylor Yionoulis

1. Which of these would most you like independence from? A) Financial Worry, B) Job Stress, C) My in-laws, D) Spam e-mail **E) Other Reality TV**
2. I recommend for a fun summer read: **The Four Agreements.**
3. My favorite T-shirt/Bumper Sticker wisdom is: **Rule No.1: Never lose money. Rule No.2: Never forget rule No.1. --Warren Buffett**
4. If I won the Lotto I would A) Shout it from the rooftops, B) Keep it to myself
Keep it to myself, maybe tell my husband.
5. Summer movie you would NOT like to see: **The A Team**



PR/Community Outreach Committee-

The Committee received very positive feedback from it's recent Pro Bono Panelist presentation. To keep the pro bono momentum strong, the Committee is actively seeking Denver based non-profits interested in offering our members the opportunity to service those in need.

Stay tuned for additional information and opportunities in the coming months.





WEPC has renewed its affiliation with the National Association of Estate Planners & Councils (“NAEPC”). This gives WEPC national exposure and provides WEPC with additional resources. Please take a moment to browse the www.naepc.org website. There is a lot of information available to you at no cost, including articles on varied topics that may be of interest to you.

NAEPC offers seminars at a reduced cost on many different topics. Please visit <https://interactivelegal.webex.com> to register for any of the following educational seminars: **July 30, 2010 – 1:00pm – 2:00 pm ET** The Critical Importance of Tax Apportionment Clauses with Jonathan G. Blattmachr, JD, AEP® (Distinguished); **August 11, 2010, 12:30 pm–2:00 pm ET** Structuring and Administering Effective Family Limited Partnerships with Jonathan G. Blattmachr, JD, AEP® (Distinguished) and Professor Mitchell M. Gans and **August 25, 2010 – 1:00 pm–2:00 pm ET** Estate Planning for the Family Business Owner with Jonathan G. Blattmachr, JD, AEP® (Distinguished). **September 22, 2010, 1:00 pm – 2:00 pm ET Key Estate Planning & Trust Issues in Uncertain Times with Al W. King, III, JD, LL.M., AEP® (Distinguished)**. Continue to check the site for other seminars and for more information about these seminars.

As a reminder, as part of the NAEPC, the WEPC Board has the authority to nominate one member of each of the five (5) professional disciplines of attorney, accountant, life insurance professional, financial planner, and trust officer per year. Each applicant must have at least 15 years experience in her field to be an Accredited Estate Planner (AEP) and must be presently and significantly engaged in "estate planning activities". If approved by NAEPC for the designation, then your name and contact information would be listed on the NAEPC website (www.naepc.org) so that anyone searching for an AEP in your discipline in Colorado would find you.

Please go to the NAEPC web site for further information on the AEP designation and to see the associated costs that would be your sole responsibility. Please contact Nora Roth (303-864-7226 or nroth@csbt.com) if you would like to be considered for this designation.

Wishing you all a beautiful and prosperous Summer!

Nora E. Roth
Colorado State Bank and Trust
Vice President and Personal Trust Officer