



Update

August 2008

Women's Estate Planning Council

President's Corner

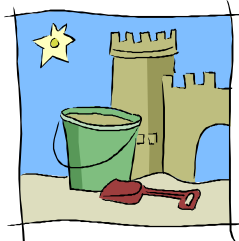
While vacationing on the beach last month I watched my son build a beautiful sandcastle. All afternoon he delighted in spooning out the moat and packing the walls.

Our clients also shape granules into grandeur. A lifetime is spent juggling the numbers, forecasting the future and building an empire. They too are diligent and determined. Two builders of two castles. For both, the tide will rise and the end will come.

All day the pounding waves reminded my son that the end was inevitable. As dusk approached, he anxiously watched as the waves slapped at his creation. Just as our clients see the wave of years slowly eroding their own castles, they sometimes are terrified and want to block the waves from the walls they have constructed. This is where our best work as estate planning professionals are performed.

Children know a lot about sandcastles. Watch them and learn. When the sun sets and the tide takes--salute the process of life.

Kimberly L. Curtis, CFP®, ChFC, CLU, CAP, AEP, MSFS
President



Meetings

2nd Thursday of each month

Networking: 5:30 pm

Remarks: 6:00 pm

Program: 6:10 – 7:00 pm

Guest Fee: \$15.00

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

Please note, the October meeting has been moved the 16th (3rd Thursday) due to Yom Kippur.

September 11th: Funeral Planning with The Monarch Society

October 16th: To Be Announced—check the website for updates

November 13th: Judy Martelero, Tax Planning

December—Date TBD, Girl's Only Theater Night. Stay tuned for more details!



NAEPC Conference

Care to spend some time in Scottsdale in November? The National Association of Estate Planning Councils can help! On November 12-14, 2008, the 45th annual NAEPC Conference will be at the Doubletree Paradise Valley in Scottsdale. For more information on the programs or to register online, go to www.naepc.org/convention.web.



Speakers Wanted

Please contact Myra Donovan or Lisa Porcella if you would be willing to present at a WEPC meeting. This is a great way to let members get to know you better while helping us provide quality programming for the group.

Welcome, New Members!

- Teresa Baird, Attorney, Fairfield and Woods, PC
- Kelli Connor, CPA, GHP Horwath, PC
- Karen J. Inman, CPA, GHP Horwath, PC
- Angela K. Kennedy, CPA, GHP Horwath, PC
- Kim Schneider Malek (Associate Member), Family Enterprise Sustainability Consulting, The Schneider Consulting Group, Inc.
- Allison Pottinger, (Associate Member), GHP Horwath, PC
- Debbie Reinberg (Associate Member), Elder Mediation/Conflict Resolution, ELDEResolutions
- Kami Pomerantz, Attorney, Holland and Hart LLP
- Natalie Decker, Attorney, Decker and Leutwyler, LLC



Quote of the Quarter: "There are people who have money and people who are rich"—Coco Chanel

2008-2009 Board Members

President Kimberly Curtis 303-753-7578
 Vice President Cathy Schwartz 303-770-5511
 Immediate Past Pres. Nora Roth 303-864-7226
 Treasurer Carol Hein 303-421-4227
 Secretary Maura Ridge 303-850-7900
 Programs Myra Donovan 303-871-7249
 Programs Lisa Porcella 720-221-5020
 Membership Darla Daniel 303-864-7209
 Membership Dana Sandoval 303-531-8176
 Public Relations Leslie Karotkin 303-300-1790
 Hospitality Erica Johnson 303-321-1267
 Hospitality Amy Berk 303-721-6055
 Newsletter Kristi Sullivan 720-524-6848

Reach Out to Members of the WEPC

Forget the Yellow Pages! Promote your company to people you really want to do business with—WEPC members! Personal web subscriptions are only \$30/year. Add a link to your website and it's only \$60/year. Go to www.wepc.net to register.

Public Relations Update

Great job to our Publicity Chair, Leslie Karotkin for getting the WEPC featured in the Denver Post, the Rocky Mountain News and the Denver Business Journal. Leslie Submitted our new board to both newspapers and they were published this summer! Now, the Denver Business Journal is working on an article featuring the WEPC! Stay tuned for more of your group in the news.



Letter from Nora Roth, Past President

I would like to take this opportunity to express my heartfelt appreciation to the 2007-2008 board members: Vice President Kim Curtis; Treasurer Carol Wilson; Secretary Melissa Sugar; Membership Co-Chairs Erica Johnson and Dana Sandoval; Program Co-chairs Cathy Schwartz and Jan Netting; Hospitality Lisa Porcella; Publicity Roseann Murray and Website Barbara Leff for their dedication, assistance and support. I would also like to thank Kristi Sullivan for taking on the Newsletter. This organization is able to function at a very high level due to their efforts.

We have had a year of great fun, socializing, wonderful speakers, camaraderie, education and networking. To expand our networking and knowledge, we joined the National Association of Estate Planners & Councils and have a link on their website www.naepc.org. We also joined the Leimberg Listserv. We joined these organizations to better serve you - our members.

Additionally, I would like to thank all of the WEPC members for your continuing support, attendance and enthusiasm. As far as we know, the WEPC is the only women's estate planning council in the nation. It has been a delight to meet with all of you and to share our concept with others who may follow in our pioneering footsteps.

Going forward, we are privileged to have Kim Curtis as our incoming President. She was very active as your Vice President and brought a lot of great ideas and energy to the table. Kim has already hit the ground running with the WEPC Handbook and she will be supported by a superb board. Consequently, we can all anticipate another great year for WEPC. Thank you all for permitting me to serve as your President - I am honored to be a part of the WEPC.

Sincerely, Nora E. Roth

WEPC Members on the Move!

Congratulations to Julie Gunkel, who is being installed as President of the Rocky Mountain Chapter of The Society of Financial Service Professionals. The Society is a multidisciplinary network of credentialed professionals with over 18,000 members nationwide. The Rocky Mountain chapter is over 70 years old and has over 250 members.

Please contact Kristi Sullivan at Kristi@sullivanfinancialplanning.com with YOUR news about promotions, board appointments or career milestones. The WEPC would love to celebrate with you!

Flash Interview with New Member Kelli Connor

Ideal Client— One who does what I ask them to.

Mountains or Ocean? Ocean

Last movie seen - Oceans's 13, thumbs up

First pet's name - Chocolate, a Chocolate Pinscher

Vacation fantasy- Greek islands

Favorite Magazine - Gourmet



Flash Interview with Existing Member Julie Gunkel

Ideal Client—A person who cares as much about their financial well-being I do.

Mountains or Ocean? Mountains

Last movie seen—Batman, thumbs

First pet's name—Mac

Vacation fantasy—Egypt, then on to Australia

