Update *First Quarter 2009*

Women's Estate Planning Council

President's Corner

Happy New Year! WEPC has much to look forward to in 2009. Our membership has grown and our meetings are vibrant and informative.

An article in Ode magazine used the term "patient capital". The principle of patient capital is to regain our connection back to the family and away from Wall Street by investing in the daily life of living our dreams and passions and understanding our life's work. The article went on to say how our society and economy's metrics exalt extraction and consumption to define free markets and capitalism that demands growth.

How intriguing…I began to think how this may impact our work as estate planners. Our family systems need to create a different metric that prioritizes preservation, sustainability and restoration. Our addiction to speed and maximum returns interferes with our ability to fight back the shirtsleeves to shirtsleeves proverb. Our elders need to be involved in the enhancement of the younger generation's individual pursuit of happiness, so a new generation of a different kind of wealth creator can be born. In the family market, we can use patient capital to define the success of the family. The time horizon is longer and risk profile and rate of return are different.

Patient capital can be based on the individual and families value system. The family allocates capital, around its human and intellectual interests. Dollars, rupee, baat, euro would no longer be the appropriate currency for measuring long term family success. Harmony, love, passion and purpose are the currencies of the family and its future. Imagine how the drafting of estate planning documents might change or be enhanced. That's my New Year's Resolution.

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

January 8, 2009: Elder Mediation—Easing the Tough Conversations
Speakers Debbie Reinberg and John Rymers of ELDEResolutions
February 12, 2009: Medicare 101
Speaker Kathy Turley, Kaiser Permanente
March 12, 2009: Denver Foundation Event
April 9, 2009: Estate Planning for Non-Traditional Families
Speaker Erica Johnson, Ambler and Keenan

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!

- Georgine Kryda Ph.D., Esq., MBA, Attorney, Georgine Kryda Ph.D., Esq., LLC.
- Stefanie Deters, Attorney, Holme, Roberts & Owen LLP
- Sandy Blaha, Associate, Sandy Blaha Performance Consulting
- Mary Milan Bock, Attorney, Duncan & Thompson, LLC
- Rachel Comfort, Associate, AXA Advisors, LLC
- Lisa Eastin, Attorney, Solem Mack & Steinhoff
- Melissa Montgomery-Fitzsimmons, Attorney, JP Morgan
- Teasley Ruback, Associate, BKD Wealth Advisors
- Denise Schuh, Attorney, Charles Schwab and Co., Inc.
- Connie Smith, Attorney, Rothgerber Johnson & Lyons

Quote of the Quarter: "Can anyone remember when the times were not hard and the money not scarce?" - Ralph Waldo Emerson

2008-2009 Board Members

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Vice President Cathy Schwartz 303-770-5511
Immediate Past Pres. Nora Roth 303-864-7226
Treasurer Carol Hein 303-421-4227
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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

Top 10 Business Book Best Sellers

From Amazon.com January 6, 2009

1. Outliers: The Story of Success by Malcolm Gladwell
2. Jeffery Gitomer's Little Teal Book of Trust: How to Earn It, Grow It, and Keep It to Become a Trusted Advisor in Sales, Business and Life by Jeffrey Gitomer
3. The Motley Fool Million Dollar Portfolio: How to Build and Grow a Panic-Proof Investment Portfolio by David Gardner and Tom Gardner
4. Hot, Flat, and Crowded: Why We Need a Green Revolution—and How It Can Renew America by Thomas L. Friedman
5. The Tipping Point: How Little Things Can Make a Big Difference by Malcolm Gladwell
6. Getting Things Done: The Art of Stress-Free Productivity by David Allen
7. The Soulmate Secret: Manifest the Love of Your Life with the Law of Attraction by Arielle Ford
8. Managerial Accounting by Ray Garrison, Eric Noreen, and Peter Brewer
9. The Snowball: Warren Buffett and the Business of Life by Alice Schroeder
10. Blink: The Power of Thinking Without Thinking by Malcolm Gladwell

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.

WEPC Members on the Move!

We want to hear about what's happening with our members! If you have news about a promotion, new job, new certification, or great business accomplishment, please contact Kristi Sullivan at 720-524-6848 or Kristi@sullivanfinancialplanning.com. The WEPC would love to celebrate with you!

Flash Interview with New Member Lisa Eastin

Number of years in practice: 7 on, 20 off, now 1.5 years on
Book last read or currently reading: For Whom the Bell Tolls by Earnest Hemingway –difficult but worth it. Both John McCain and Barack Obama say it's their favorite book.
Biggest Pet Peeve: Technical difficulties with office equipment
Favorite thing about winter: Newly reacquainting with cross country skiing
Person you admire: Nelson Mandela
Favorite place you've visited: South Africa

Flash Interview with Existing Member Deni Cates

Number of years in practice: 4
Book last read or currently reading: How Capitalism Saved America by Thomas DiLorenzo—Good book!
Biggest Pet Peeve: People who get on the freeway too slowly
Favorite thing about winter: How pretty the mountains look
Person you admire: Ron Paul
Favorite place you've visited: Amsterdam

Leimberg Renewal and National Estate Planning Council Opportunity

WEPC became a member of the National Association of Estate Planners & Councils at the beginning of 2008. As a benefit of being a member of NAEPC, WEPC was listed on the NAEPC web site and was also able to enroll our members with the Leimberg Information Services (LISI) Web Site.

As a member (unless you are a new member and were not signed up), you have had unlimited access to LISI at www.leimbergservices.com. LISI provides financial service professionals fast, frank and incisive analysis of proposed and recent legislation, regulations, cases and rulings by experts.
The subscription also includes up to six newsletters providing analysis of proposed and recent legislation, cases and rulings.

Additionally, LISI gives you access to hundreds of cases, rulings and legislation that they've already reported on, and a database of all of those that they'll be posting in the future. You can create custom searches to locate specific topics, references and citations of particular interest to you. Other benefits include retirement and Roth IRA calculators, ten-year archive of their monthly FaxNet data service and Section 7520 and other important rate information.

The WEPC Board would like your input on whether or not to re-enroll in this service. The enrollment fee is now $18/member per year (a small increase from $16/member last year). This is a substantial discount from the usual rate of approximately $25/month. If we decide to re-enroll, we are required to enroll all of the WEPC members.
Please let your Immediate Past President Nora Roth know – either in person or via e-mail at north@csbt.com – whether or not you used this service and, if you did use it, whether or not you found it helpful. Nora will tally the results and present the information to the Board.

Additionally, as part of the NAEPC, the 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 and to see the associated costs that would be your sole responsibility. Please see your Immediate Past President Nora Roth if you would like to be considered for this designation.

Wishing you all a very Merry New Year!

Immediate Past President Nora Roth

And a good time was had by all!

If you missed the fun of our December day at the theater, don't worry! There is always next year. Maybe these photos will inspire you to join us, either again, or for the first time.