



Update

March 2008

Women's Estate Planning Council

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

President's Corner

Greetings everyone! We have some very exciting news. In February, the WEPC Board decided to join the National Association of Estate Planning Councils (NAEPC). The NAEPC is a national organization of professional estate planners and affiliated *Estate Planning Councils* focused on establishing and monitoring the highest professional and educational standards. NAEPC fosters public awareness of the quality services rendered by professionals who meet these standards. NAEPC builds a team approach involving cross-professional disciplines to better serve the public's need in estate planning. NAEPC maintains a national website which will include a link to our website so those looking for an Estate Planning Council in the Denver area will see our link. The NAEPC has a conference every year which attracts nationally known speakers.

The NAEPC makes speakers available to all dues paying councils at NO CHARGE. However, the council must fund the travel, lodging and meeting expenses. Although we are too small at present to pay for all of these expenses, we may be able to partner with another council in the area to reduce the costs.



As a member of a council that is affiliated with the NAEPC, you are entitled to receive free services or special discounts on products and programs such as educational events, Acquire Direct Marketing, Docubank: Emergency Access to Healthcare Directives, The Humane Society of the United States, BEI's Boot Camp for Advisors, *Business Week* magazine, CCH, a Wolters Kluwer business, Civicom an Dial-a-Note, Wealth Transfer Planning, Kettley Publishing Software, Konica/Minolta, National Center for Family Philanthropy and *Trusts & Estates*.

Additionally, we have the opportunity to join the Leimberg Information Services (please see detailed information elsewhere in this issue). The Board decided to join this service for 2008 on behalf of all of our members. WEPC has sufficient funds to pay for this service for all of our members for the remainder of the calendar year 2008, but does not have sufficient funds to do this on an ongoing yearly basis. Thus, we will need your feedback on this service to see if it is useful to you. If it is beneficial to a majority of our members, then we will discuss adjusting the dues to cover this cost starting with the 2009 calendar year.

Thank you all for your continued support of the *Women's Estate Planning Council*. Please think about volunteering to serve on the Board since we have several open positions for the upcoming 2008/2009 year. Be proud – as far as we can tell, we are the only Women's Estate Planning Council in the country!

- Sincerely, Nora Roth, WEPC President

Meetings

2nd Thursday of each month

Networking: 5:30 pm

Remarks: 6:00 pm

Program: 6:10 – 7:00 pm

Guest Fee: \$10.00

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

April 10, 2008: Special Needs Planning for Loved Ones with a Disability.

Speaker: Hal Wright, Financial Advisor, Waddell & Reed

Hal Wright does comprehensive special needs financial planning, integrating life planning, resource planning, financial planning, and legal directives. His discussion will cover government and community resources available and special considerations for trust, estate, and tax planning when working with special needs cases.



Welcome New Members!

Amy Berk

Melissa Edelman

Janine Guillen

Nancy Klick

Sheila

Koppenheffer



Quote of the Quarter: A person who never makes mistakes never makes anything. - Anon

2007-2008 Board Members

- President Nora Roth 303-864-7226
Vice President Kimberly Curtis 303-753-7578
Treasurer Carol Hein 303-421-4227
Secretary Melissa Sugar 303-873-7579
Programs Cathy Schwartz 303-770-5511
Programs Jan Netting 303-321-1090
Membership Erica Johnson 303-321-1267
Membership Dana Sandoval 303-299-9444
Public Relations Roseann Murray 303-892-5700
Hospitality Lisa Porcella 720-221-5020
Newsletter Kristi Sullivan 720-524-6848

Participating on the Board is a great way to get the most out of your WEPC membership! Any member can run for office—terms are 2 years. Contact Nora Roth to volunteer.

Proposed Slate of 2008-2009 Officers



- President..... Kim Curtis
Vice President.....
Secretary..... Melissa Sugar
Treasurer..... Carol Wilson
Membership Co-Chair..... Dana Sandoval
Membership Co-Chair....
Programs Co-Chair..... Cathy Schwartz
Programs Co-Chair..... Lisa Porcella
Hospitality.....
Publicity.....

New Benefit for WEPC Members!

The Leimberg Information Services (LISI) Web Site runs \$16/member per year if we sign up between now and April. This is a substantial discount from the usual rate of \$22-\$24/month. We are required to enroll all of the WEPC members. WEPC will make the payment for 2008 and do the enrolling for all of our members. If you as a member do not want the service, then you simply do not open the e-mail about how to use the website.

As a member, you will have 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 such as: John McFadden, author of a number of books including The Tools and Techniques of Employee Benefit and Retirement Planning by Lisa Starczweski and Jim Maule, authors of many BNA Tax Management portfolios Bob LeClair, creator of Financial Planning Toolkit and author of Tools and Techniques of Financial Planning.

The subscription 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.

For those of you already subscribing to LISI, please note that the cost is at a substantial discount and does not include the e-mail blasts about breaking news. However, you can find all of the same information through the website link access. While the subscription is in process, you can go online and sign up for temporary access at the website listed above.



Guest Fees

To help offset rising food costs, we will be raising the Guest Fee to \$15 beginning in May, 2008.



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.