



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

Under the leadership of Kim Curtis, immediate past President, amazing strides were made, especially in growing our membership and increasing member involvement. I am honored to be taking over the reigns to keep the momentum going. I'd like to thank the 2008-2009 WEPC Board and committee volunteers for their service and dedication, and I'd like to welcome the 2009-2010 WEPC Board and committee volunteers and let them know that their enthusiasm and commitment is greatly appreciated.

To start off the 2009-2010 WEPC year, the new Board gathered at my house for an informal dinner to get to know one another better and share ideas about our vision for the future of WEPC. As the Board and committee chairs began to set goals for the up-coming year, I began to reflect on the personal goals I set for myself at the beginning of the 2009 calendar year. I was startled to realize that we were half-way through 2009, and I was dismayed to realize that I had lost sight of my New Year Resolutions (gasp!). The good news is that there is still half of the year left to get back on track and cross that finish-line. If you have lost sight of your goals, now is the time to reaffirm them and take steps towards reaching them by year-end. If you have already achieved the goals you set for yourself this year (congratulations!) or have made good progress (keep up the good work!), perhaps it's time to create a new goal.

Even though I haven't yet made as much progress as I would like towards my 2009 goals, I have made a mid-year resolution to take action now so I can move closer to accomplishing what I originally set out to do. I have also decided to adopt a new mid-year resolution: To become a tourist in my own town. When traveling, I plan my trips to make the most of the time I have exploring new places. I'm sure many of you do the same, making sure to see the "highlights" and soak up as much of the culture as possible. This summer I realized that there are many things right here in the Denver Metro area that I have never taken the time to see. With the current economic challenges we are all facing, we have been hearing a lot about "local tourism" (i.e. people vacationing in their home towns to save money). Whether or not the economy is limiting my choices for leisure activities, I want to make sure that I am seeing what's right in front of me and appreciate all Colorado has to offer. First stop: Denver Art Museum to see the "Psychedelic Experience" (cool art posters from the 60s). What's your mid-year resolution?

RSVP Policy—New!

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: \$15.00

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

August 13, 2009: A Case Study of the Denver Scholarship Foundation

We will discuss the formation and administration of a public charity: the differences between public charity, private foundation and donor advised funds; tax considerations and legislative activities.

We are thrilled to have the following panel members to lead our discussion: **Myles Mendoza**, Development Director, Denver Scholarship Foundation, **Rachel James**, Esq., Partner, Davis, Graham & Stubbs LLP, and **Bob Phelps**, Managing Director, JPMorgan Private Bank

September 10, 2009: Networking Happy Hour—Stay Tuned for Location.

Please contact Myra Donovan or 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!

Quote of the Quarter: "The finest inheritance you can give to a child is to allow it to make its own way, completely on its own feet" -Isadora Duncan (known as a founder of modern dance)

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!

- Kate Carr, CFP and CPA, BKD, LLP
- Mary Rolsch, Trust Officer/Financial, Steele Street Bank and Trust
- Lorni Sharrow, Attorney, Moye White, LLP
- Lisa Ludwig, Attorney, Welborn, Sullivan, Meck and Tooley, PC
- Suzie Tiftickjian, Attorney, Suzanna Wasito Tiftickjian, LLC



Congratulations to Erica Johnson!



Ambler & Keenan, LLC would like to congratulate Erica Johnson on her appointment by Mayor John Hickenlooper to a two-year term on the Denver GLBT Commission.

The mission of the Denver GLBT Commission is to enhance the social, economic and political quality of life by assisting members of the GLBT community in the attainment of equality and full opportunity, and to advise the Mayor on such matters.

Flash Interview with New Member Lorni Sharrow

Summer Blockbuster Movie you are hoping NOT to see: *Transformers and Terminator Salvation.*

Favorite method for cooling off in the summer: *Funny... go to the movies or go bowling - no AC at home.*

Gardening or plastic plants? *It depends. There is a real sense of accomplishment when gardening, but plastic plants can have a surprise 'Je ne sais quoi' flare for many situations.*

Vacation accommodations: Campsite or Condo? *Campsite.*

Favorite childhood vacation memory: *Sleeping under the stars - either camping or on the trampoline.*

Flash Interview with Existing Member Carol Wilson

Summer Blockbuster Movie you are hoping NOT to see: *Angels and Demons – I didn't care for the book, so I'll stay away from the movie*

Favorite method for cooling off in the summer: *My condo swimming pool was painted Bikini Blue last spring – the water looks fabulous and feels even better.*

Gardening or plastic plants? *Gardening, but on a very limited basis. I pull weeds (I hope that's what they are) in our community garden.*

Vacation accommodations: Campsite or Condo? *Years ago it was the campsite, today, give me the condo.*

Favorite childhood vacation memory: *Going to my grandfather's company's compound on Grand Lake of the Cherokees in northeast Oklahoma. The cousins ran around all day: boating, swimming, fishing, trying to catch the horses, sleeping on the screened in porch.*

National Estate Planning Council Update



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. Go to www.wepc.net to register.