Women's Estate Planning Council Update

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

President's Message

By Constance D. Smith, Esq., Fairfield and Woods, P.C.

Whew! We all survived the tax turmoil in December and the fiscal cliff in January. The good news is that we have a PERMANENT and UNIFIED estate, gift and generation skipping transfer tax exemption. However, we now also face a new set of income tax laws and the upheld Patient Protection and Affordable Care Act with incumbent regulations for 2013 and beyond. This may cause us to rethink some of our advice for clients as each financial tool is examined in light of the new laws and regulations.

After several years of firms and practices contracting or holding their own, many now expect to grow with the relatively stable economy. Part of that growth will be evaluating options, new and old, and creating value for clients, then sharing this information with clients and colleagues who can refer clients. What a great time to be a member of an estate planning council where you can get timely expert information, integrate ideas and network with other experts – over a glass of wine!

At the National Association of Estate Planners and Councils annual conference (we are an affiliate of NAEPC), I learned that our WEPC is the ONLY women's council in the country, and WEPC is among the very lowest price for offering professional education credits. When it comes to providing dinner, drinks AND CLEs/CPEs, every month, we were unmatched! So as we face a new year of professional, personal and business growth, please consider sharing our council's special features with your female colleagues. The more members we have, the better we serve each other and our clients.

To increase the value to our existing members, we are again sending out this newsletter to share our members' business, marketing and personal announcements and more than half of our members are now on the WEPC LinkedIn Group to share more timely information and requests. We have limited our LinkedIn access to members only, to protect information there. We try to consider our members first as speakers at our meetings, so please let our Programs Committee chair, Arlene Barringer, know if you'd like to present (no solicitations or marketing pitches permitted).

Lastly, the best way to get value from an organization is to get involved and get to know the individuals and their talents. As we approach our election of new officers and Committee chairs in May, please consider nominating someone (including yourself) for a committee chair, or an officer position. We will need a new Secretary, a new Vice President (to become President the following year), and a new Treasurer (preferably a CPA). Committees can always use volunteers to lighten the load, and you can find all that information on the WEPC web page (http://www.wepc.net/committees.html).

Come grow with us and make some new friends!

Programs and Community Events

WEPC member Fran Coet, CPA/CFF, CVA, CFP, CFFA, CDFA of Coet & Coet, PC, CPA's presented her enlightening annual tax update, including the fiscal cliffhanger, at our January meeting. Thank you Fran!

At our February meeting, WEPC member Attorney Erica Johnson of the law firm Ambler & Keenan LLC gave an informative presentation on the New Estate Tax Law: What's Changed, What Hasn't and How it Affects Estate Planning for the Future. Thank you Erica!

March Meeting: Thursday, March 14, 2013

Dennis Whitmer, Esq., Special Counsel with Hamilton Faatz and Waller, P.C., will be speaking on defining the agent's duties under a financial durable power of attorney. The financial durable power of attorney is a useful document that has come into widespread acceptance and use over the last few decades. However, this deceptively simple document can cause a plethora of problems when it is abused by a dishonest agent or misunderstood by an agent acting in good faith. Dennis was a trust officer for thirty years and now represents fiduciaries and serves as an expert witness in fiduciary matters.

April Meeting: Thursday April 18, 2013 (please note this is one week later than the normal schedule)

Kathryn Kaye, Psy.D., will be speaking on evaluating "capacity" of clients with diminished cognition. Dr. Kaye is a licensed clinical psychologist specializing in geropsychology, adult neuropsychology, and geriatric neuropsychology, with offices in Denver and Boulder. Her expertise includes geriatric assessment of cognitive functioning.

May Meeting: Thursday, May 2, 2013 (please note this is one week earlier than the normal schedule)

We are delighted to announce that Paul S. Viren, CLU, ChFC, AEP, of Viren & Associates, Inc. in Spokane, Washington will present "Beneficiary Designations, How to Really Screw Up a Good Estate Plan!" Paul's journey in working with clients as a financial advisor began in 1994 after a six-year stint as senor director of development at Whitworth College where he cultivated his passion for financial and estate planning. Advising individuals and businesses in all walks of life, it is his goal to help clients achieve their financial goals, protect their assets, and reduce income and estate taxed. Paul now serves on the board of directors of the National Association of Estate Planners & Councils (NAEPC). Paul is speaking to us care of the NAEPC Speakers Bureau.

Meetings

- Date: Second Thursday of each month
- Time: 5:30 – 7:15 pm
- Guest Fee: $25.00
- Dinner is provided
- ***We are delighted to have a beautiful meeting location:***

The Denver Foundation
55 Madison Street, Denver, CO
7th Floor Conference Room

Quote of the Quarter:

"*The secret of getting ahead is getting started.*"
~ Sally Berger

R.S.V.P. Policy

In order to get an accurate food estimate for meetings, we MUST have R.S.V.P.'s by the Tuesday before each meeting. Guests may R.S.V.P. and pay online, at www.wepc.net/meetings.

Good News from Our Members!

Colorado Fund for People with Disabilities of Denver (Megan Brand, Executive Director) was recognized for its work with people with disabilities by the Consumers United Association – Recognition of Excellence in Financial Education with Right on the Money Awards in December 2012. This award will enable CFPD to produce web-based programming to reach people living outside of the metro area.

Laurie A. Hunter, Esq., Wade Ash Woods Hill & Farley, P.C., received the Richard N. Doyle CLE Award of Excellence at the Colorado Bar Association/CLE in Colorado, Inc.'s annual Reception and Wine Tasting on December 3, 2012.

On the Move

Mary Milan Bock, J.D., is excited to announce the opening of her new agency, "Guiding Hand for Seniors: Assisted Living Placements of Colorado, LLC." She will conduct a comprehensive assessment of your loved one's care needs, geographical preference and financial parameters, then join you on personalized tours of assisted living communities. Best of all, her service is FREE to families!

Lisa S. Hardin, Esq. recently launched her solo practice, Law Office of Lisa Hardin, LLC. Her practice includes, estate planning & administration and tax planning.

Rebecca Theis, Esq. is joining Steele Street Bank & Trust as a trust administrator in March 2013.

Kimberly A.S. Utesch, Esq. launched her solo practice, Utesch Law, LLC, focusing on real estate, business, and estate planning, with limited family law work.

Samantha White, Esq. joined BakerHostetler and is continuing to focus on tax, estate planning and business law.

Members Speaking Out

Barbara Cashman, Esq. presented at the CBA CLE – Death of a Solo, Death of a Law Practice – Facing the Inevitable Event, on February 11th, and presented on Exit Planning at Advising Small Companies – Responding to Your Client's Needs with Practical Advice on February 27th.

Ayo Labode, Esq. presented on Elders in the Criminal Justice System – Placement of Sexual Predators or Violent Elders; Incarceration; Resident Rights, Mental Illness and Adjudication; Visitation, Dating, Sex, Medical Marijuana, Street Drugs, Denver Regional Council of Governments (DRCOG) and Ombudsman on February 15th as part of the Advanced Elder Law Institute Event.

Lee A. McCue, Keller Williams Realty DTC, presented "Should Mom or Dad Move In with Me…10 Things to Consider" at St. Andrews United Methodist Church in Highlands Ranch for the Supporting Aging with Choices for You and Your Loved Once Series on February 5th.

2012-2013 Board Members

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Celebrations!

Suzie Tiftickjian welcomed her second son, Luke Christian Tiftickjian, to the world on December 17th. All are doing great!

Constance D. Smith, Esq. Fairfield and Woods, P.C., has been invited to join the Greater Denver Tax Council and the NAEPC website committee, and is the proud grandmother to Hannah Joy!

Welcome New Members!

- Lisa Hardin, Esq., Law Office of Lisa Hardin, LLC, LL.M. expected June 2013
- Kimberly Johnson, Esq., LL.M. expected June 2013

WEPC Online

Check out the WEPC website – www.wepc.net

1. Easy to use Member Directory. Use alphabetical or career specialty listings. Need an expert or referral partner? Go to the WEPC Member Directory!

   ***Has your contact information changed? Please review your listing under "Our Members" on the website and submit an update form if any of your contact information has changed**

2. Member Handbook now online. Every wonder what certain committees or board members do? Read the descriptions in the Member Handbook!
3. Submit Membership Application and pay dues and RSVP online!

WEPC LinkedIn Group – www.linkedin.com

1. Get connected with other WEPC Members.
2. Start a discussion, ask a question, request a referral, or post an article of interest to the WEPC.
3. Use this forum to share our collective knowledge and experience.

Board Nominations

We are seeking nominations of members to join our board for 2013-2014. Officer positions available are Secretary, Treasurer and Vice President. Committee co-chairs are also board members, and at least one co-chair will be needed for each committee. See our Handbook for listing of committees and duties (linked from our web page www.wepc.net). If interested, please contact Connie Smith or Myra Donovan. The slate will be finalized in early April.