Women's Estate Planning Council Update

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

Message From Outgoing President

By Constance D. Smith, Esq., Fairfield and Woods, PC

It has been a wonderful year as your President, working with a dedicated group of officers, committee chairs and volunteers. Many of the changes we were able to make were due to these hard working women and other members who stepped up for individual events or needs. We couldn't be the organization we are today without you!

If you haven't been to a meeting lately, you're in for a surprise. We moved out of the basement last year and into the Denver Foundation's Community Room – with a view of the mountains! We changed caterers and now serve dinners with our wine instead of hors d'ourvres, thanks to Sara Jones who researched all our options and worked with the caterers each month. Hayley Meyer helped out with the wine and water. The room has tables in the round so we can see (and hear) everyone in the room. Thank you Vickie Wilson and the Denver Foundation!

Our Summer "picnic" was a wine tasting with paired foods and a fabulous lemonade cake, which Frances Mickelson organized and provided ice breakers for. The Holiday event at Castles Interiors was put together by Frances Mickelson, Julie Fletcher and Sara Jones, complete with wine and games, and some designer décor.

To connect our members better, Barbara Tocker Ross, Kirsten Jacobs and Becky Theis restarted our quarterly newsletter. If you're not receiving it by email, you need to send Becky or Kirsten your current email address. And don't forget to let them know about any job changes, awards, presentations, and family news you'd like to share. Barbara worked to get our LinkedIn page secured for members only and coordinated all our e-vites and web page changes with Valerie Miller. We now have over 60% of our members connected to our LinkedIn page. If you're not on our LinkedIn, you're missing out on timely announcements, professional assistance and referrals between meetings.

Lisa Perry personally screened and welcomed our new members (a few each month) and kept the name tags and guest fees straight for us. We are now approaching 100 members again! (Don't forget to pay your dues and keep our numbers growing.) Our continuing liaison to NAEPC, Nora Roth, kept us informed on the various NAEPC opportunities, including bringing in national speakers we could afford. She can even get members nominated to be an Accredited Estate Planner. And of course, we wouldn't even have meetings without the long list of wonderful speakers Arlene Barringer put together, and the CE credits Thiensa Nguyen obtained behind the scenes. Kudos to each of you!

Your officers managed to handle some corporate matters, so we are officially registered and have new bylaws and a corporate record book. Kristin Piñeiro wore many hats to keep the board minutes and chair meetings when I was out of town. Griselda Casillas kept all our finances straight until her new son, Mateo, made a surprise visit in April. And Myra Donovan completed her time on the board by putting together the slate of officers for 2013-2014.

I am so honored to have stood at the helm of these dedicated women this past year. Please give each one your personal thank you when you see them at the next meeting, and don't forget to welcome and support your new officers and co-chairs. You could even volunteer to help and get to know us better - that's how our networks grow.

And with this last message, I pass the gavel to your new President, Kristin Piñeiro. You go girl!

Message From Incoming President

By Kristin Piñeiro, Esq., Wallace Scott, PC

It's an honor to serve as the Women's Estate Planning Council's next president.

I am very proud that we are the only National Association of Estate Planners and Councils (NAEPC) affiliate that was formed specifically with women in mind. For nearly twenty years, the Women's Estate Planning Council has been a supportive organization for its members in enhancing their professions in the estate planning community. Our members are able to network at meetings, through our LinkedIn site (exclusively for our members), and receive professional education credits. In addition, our special events (including our summer picnic, holiday party and charitable outreach events) provide the opportunity for our members to connect in a professional and friendly environment.

At our regular presentations, we will continue to address topics that are timely and are presented by local and nationally-recognized experts in a variety of disciplines. We are fortunate to have so many talented individuals in our ranks, as many of our speakers are our own members. These presentations are always thought-provoking and informative, and ultimately help us become better advisors to our clients. Having the ability to continue hosting our regular meetings at the Denver Foundation's Community Room will only serve to enhance the experience with its cutting-edge technology and amazing view!

Finally, I urge you to become involved with one of our committees – the wonderful members of these groups help direct the path of the Women's Estate Planning Council, and I think you will find it to be a rewarding and fulfilling way to maximize the benefits of your membership.

I look forward to representing you for the next year!

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
See WEPC website for directions and parking information.

Quote of the Quarter:

"Think like a queen. A queen is not afraid to fail. Failure is another stepping stone to greatness."

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.

Programs and Community Events

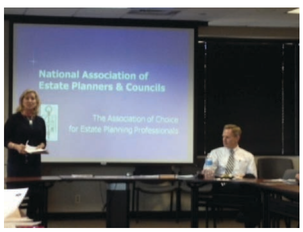
At our March meeting, Attorney Dennis N. Whitmer, Special Counsel with the law firm Hamilton Faatz and Waller, P.C. gave an informative presentation on defining the agent's duties under a financial durable power of attorney.

Pictured above:
Dennis N. Whitmer

Pictured above:
Kathryn Kaye,
Psy.D.

At our April meeting, Kathryn Kaye, Psy. D. presented to the WEPC the enlightening presentation "Evaluation of Persons with Diminished Cognition."

Our final presentation of the quarter in May was given by national speaker, Paul S. Viren, CLU®, ChFC®, AEP®, of Viren & Associates, Inc. in Spokane, Washington on "Beneficiary Designations: How to Really Screw Up a Good Estate Plan!"



Pictured above: Paul S. Viren presenting at the May meeting.

A big thank you to all our speakers!

June Meeting: Thursday, June 13, 2013

Aaron Eisenach will be presenting "Why Long Term Care Planning Must Be a Part of Every Estate Plan." While nearly every person understands the need for estate planning, few understand the importance of having a plan for extended care. Without having a well thought-out strategy in case a long-term care event happens, all of the plans we so meticulously develop and manage will be interrupted and perhaps even destroyed. Join Aaron Eisenach, CLTC, as he dispels the myth that LTC planning is mostly about protecting assets, covers the spectrum of long-term care planning solutions, and why LTC planning must be part of every estate and retirement plan.

Summer Event: Thursday July 11, 2013

Buon Appetito!

Join us in honoring the past presidents of Women's Estate Planning Council at our annual summer social!

This year's social will be held at DiFranco's, a locally-sourced, deli-style, Italian restaurant. We will enjoy a light dinner and wine while being treated to a fresh Italian cooking demonstration.

Date: July 11, 2013
Time: 5:30pm – 7:30pm
Place: 955 Lincoln Street, Unit D,
Denver, CO (The Beauvallon)

difranco's

Space is limited. Early response is advised.
Look for the Evite soon.

FREE PARKING LOCATED UNDER THE BUILDING

Good News from Our Members!

Melissa Dyer, CFP, MBA, Financial Advisor, Raymond James, was recognized in Denver's 5280 and ColoradoBiz Magazine as a 2012 Denver Five Star Wealth Manager.

Roni Lambrecht, owner of Advance Arrangements, LLC, celebrated her company's one year anniversary in May.

Lee McCue, the McTeam/Keller Williams Realty, received her Certified Senior Housing Professional (CSHP) designation, which less than 1% of realtors in the country have.

On the Move

Kimberly Johnson, Esq., joined Wiegand Attorneys & Counselors.

Suzie Tiftickjian, Esq., joined Pendleton, Wilson, Hennessy & Crow in April as special counsel, and is focusing on estate planning and probate.

Julie Fletcher, CFP, joined with Kummer Financial Strategies, Inc. as a Certified Financial Planner.

Hayley M. Meyer, Esq. joined Stuart S. Sargent, LLC, focusing on estate planning and administration.

Members Speaking Out

Arlene Barringer, Esq. of Glatstein & O'Brien, LLP will be speaking on Guardianships and Conservatorships and is the co-chair of the Elder Law Basics CBA CLE on July 19th.

Elizabeth A. Bryant, Esq. of Elizabeth A. Bryant P.C. and Erica Johnson, Esq. of Ambler & Keenan, LLC will be speaking on The Ever Changing Landscape of Estate Planning for the LGBT Community at the CBA's 33rd Annual Estate Planning Retreat from June 13-15th.

Celebrations!

Griselda E. Casillas, CPA, JDS Professional Group, welcomed her son, Mateo, to the world on April 1st (no joke!). Mom and baby are doing great!

Welcome to our New Board of Directors!

2013-2014

Board Members

President: Kristin Piñeiro
kpineiro@wallacescottlaw.com

Vice President: Barbara Tocker Ross
Barbara@srhassoc.com

Past President: Connie Smith
csmith@fwlaw.com

Secretary: Laurie A. Hunter
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Treasurer: Beth Staudenmaier
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Melissa Dyer
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Programs Co-Chairs:
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Kirsten Jacobs
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NAEPC Liaison: Nora E. Roth
nroth@csbt.com

Committee Members and Volunteers:

Newsletter Editor:
Lisa Hardin
lhardin@lisahardinlaw.com

Programs: Thiensa Nguyen
Thiensa.nguyen@tfaconnect.com

Welcome New Members!

Lane E. Hammond, Esq., Lane E. Hammond, LLC

Donnia Howell, Esq., Howell Law Group, LLC

Roni Lambrecht, Advance Arrangements, LLC

Elizabeth Meck, Esq., Benson & Case, LLP

Kevne Sharpe, CFP, A&I Financial Services LLC

Michelle M. Stoll, Esq., The Kapsak Law Firm, LLC

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

Pictured above: 2013-2014 Board of Directors.