Women's Estate Planning Council

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

Spotlight on the President

Interviewee: Kristin Piñeiro, Esq., Wallace Scott, PC

1. Where are you originally from?
   - Joliet, Illinois.

2. Why did you move here?
   - Moved out here to go to college (CU-Boulder) and loved it so much I never left!

3. Tell us about your job:
   - I am very lucky to have a job that I enjoy going to every day. I have been practicing law for almost 15 years and the last 2 ½ have been with Wallace Scott, PC, a growing firm in Larimer Square. It was founded in 2009 by my partners, Lyle Wallace and Tim Scott – we had all worked together previously at a larger firm, and when they asked me to join them in 2011, it was an exciting opportunity that I couldn't pass up. Our firm specializes in providing legal services for small to middle market business owners, and my areas of practice include estate planning, business and succession planning, and business sales and acquisitions.

4. How do you spend your time when you are not working?
   - With my family – usually going to a sports practice or event for one of my kids' various activities – we also like to ride bikes or play at our neighborhood park.

5. Tell us something unique about yourself:
   - My eyes change color (green to blue) depending on my mood – or so I'm told.

6. What is your favorite travel destination?
   - It's tough to pick just one – to narrow it down, I would have to say Hawaii (for the beach, sun and relaxation) and Italy (for the history, culture, and of course, great food).

7. What do you enjoy most about the WEPC?
   - It is a great group of outstanding women and I really enjoy the people I am able to talk to at each meeting. Our members are truly leaders in the estate planning community here in Colorado and on a national level. I can honestly say that I learn something new at every meeting.

Spotlight on PR Committee Co-Chair

Interviewee: Beckv Theis. Steele Street Bank & Trust

1. Where are you originally from?
   - I'm originally from Wales, WI – 40 miles west of Milwaukee.

2. Why did you move here?
   - I'm a Wanderlust and love to travel. Wisconsin was a great place to grow up, but in my mid-20's, I had the desire to venture out of my comfort zone and explore a new place. I had a long talk with my Mom and she said "Give it a try. If you don't do it now, then you may never do it". So, I quit my job, sold my condo, packed up a UHaul and moved to Denver with no job and only a scant number of acquaintances. Wisconsin is a great place to visit, but Denver is home.

3. Tell us about your job:
   - I am a Trust Officer at Steele Street Bank & Trust. I enjoy my job because I have the opportunity to work closely with people – individuals and families. Mainly, I work in a fiduciary capacity where we manage and administer Trusts for beneficiaries and Conservatorships. On a daily basis, my duties are quite eclectic. For example, today I spoke with an elderly client who is having issues filing for social security benefits, visited another elderly client to discuss her charitable giving, and talked to another client about establishing boundaries with her extended family. It varies. . .but is quite gratifying to help people.

4. How do you spend your time when you are not working?
   - Right now, I am quite busy. . . .I serve on the Junior League of Denver Board of Directors as the Vice President of the Community Council and on the Women's Estate Planning Council Board of Directors. I also enjoy to run or road bike, drink good wine, spend time with my 9-year old yellow lab Stella and great girlfriends.

5. Tell us something unique about yourself:
   - This may not qualify as unique, but people may not look at me and be able to picture me on water skis. I grew up in Wisconsin with a speed boat and learned how to slalom ski and wakeboard at a fairly young age – 11. I could make some really nice cuts on the ski and jump the wake on the wakeboard. I still have my slalom ski at my parents house and hope to get back on it someday!

6. What is your favorite travel destination?
   - I've been fortunate to be able to travel to many places, but my favorite is Switzerland, with Paris as a close second.

7. What do you enjoy most about the WEPC?
   - I enjoy the wonderful women! Our group has a great vibe and energy and it is easy to strike up a conversation with our members. I'm excited for this year – our new location, a great line-up of speakers, delicious meals and the opportunity to connect with the lovely professionals in our group!

NAEPC Update

By Nora E. Roth, Personal Trust Officer with Colorado State Bank and Trust

As a member of the Women's Estate Planning Council, you are also a member of the National Association of Estate Planners & Councils ("NAEPC"). 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.

Professional estate planners can now achieve an accreditation through NAEPC that acknowledges their experience and specialization in estate planning. The **Accredited Estate Planner®** designation is available to attorneys, Chartered Life Underwriters, Certified Public Accountants, Certified Trust and Financial Advisors, Chartered Financial Consultants, and Certified Financial Planners®.

The **AEP®** designation is awarded by the National Association of Estate Planners & Councils to recognized estate planning professionals who meet special requirements of education, experience, knowledge, professional reputation, and character. WEPC can nominate one person from each discipline per year. We have not had any applications this year, so get your application in now!

Please note that NAEPC is used by professionals across the country when they need to refer to someone either in or outside their geographic area so this could become a great referral source for you.

Take a few minutes to look at the website – **www.naepc.org** – to become familiar with its offerings.

If you have not received your membership website access information, please let me know – please send me an e-mail with your e-mail address at **nroth@csbt.com**. If you would like further information on how to qualify for one of the designations available, please send me an email or give me a call at 303-864-7226.

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.

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 June meeting, Aaron Eisenach, CLTC, explained to the members of the WEPC “Why Long Term Care Planning Must Be a Part of Every Estate Plan.”

At our August meeting, WEPC member Erica Johnson presented “Civil Unions & Estate Planning after DOMA Ruling.” Erica gave us the latest up to date information about civil unions, same-sex marriage, state rights and federal rights as they affect our Colorado clients.

A big thank you to all of our speakers!

In July, the WEPC held its summer event at DiFranco’s – a locally sourced, deli-style, Italian restaurant. We enjoyed delicious food and wine and a fresh Italian cooking demonstration. Many of the WEPC’s past presidents joined us for the celebration, sharing their memorable moments as presidents and wearing tiaras in honor of past president Sharon Judd Englert who is no longer with us. We thank you all for your efforts to help this tremendous organization grow and thrive.

DON’T MISS THESE UPCOMING PROGRAMS!

September Meeting: Thursday, September 12, 2013

Christopher Hornbaker and Keith Davis of Davis Schilken, P.C., will present “A Gun Trust: how to own, share, and transfer responsibly.” They will discuss all aspects of a gun trust including: What is a gun trust? How does it work? What is an “accidental felony”?

October Meeting: Thursday October 10, 2013

Carol Craigie is a psychologist turned financial planner who was also the first president of the WEPC. Carol will present “Making It Easier for Clients to Act: Applying Behavioral Economic Concepts to the Client Experience.” This presentation will introduce the behavioral economic concepts and some easy to implement communication strategies that will make it easier for clients to own and implement plans based on our recommendations.

November Meeting and Community Event: Thursday, November 14, 2013

Attorney Eric Solem of the Englewood law firm Solem, Mack & Steinhoff, P.C., will provide an overview of the Affordable Care Act and its impact on trust and estate planning for persons with special needs. Eric’s practice emphasizes elder law, Medicaid, Medicare, probate, Social Security matters, and he is a frequent lecturer on Medicaid and Social Security matters.

The Women’s Bean Project, a social enterprise changing women’s lives by providing stepping stones to self-sufficiency, will join us for our November meeting. The Women’s Bean Project will be bringing their goodies, including gift baskets of all shapes and sizes and jewelry. Meeting attendees will have an opportunity to do some shopping from 5:15p.m. – 6p.m., just in time for the holidays! They will also be presenting about their organization from 6p.m. – 6:15p.m.

Good News from Our Members!

Members Speaking Out

Elizabeth A. Bryant, Esq. of Elizabeth A. Bryant P.C. and Erica Johnson, Esq. of Ambler & Keenan, LLC will be speaking at the CBA CLE "Trust and Estate Fall Update: The Past, the Present, the Future" on November 1, 2013. Elizabeth will provide an introduction to the program and Erica will be a member of "Civil Unions Versus Legal Marriages: A Panel Presentation."

Celebrations!

Samantha White, Esq., BakerHostetler, welcomed her second child, Sophie Elizabeth, to the world on June 17th. Congratulations!

Welcome New Members!

K. Denise Albrecht, Trust Officer, U.S. Bank Wealth Management.

Catherine Asmus, CPA, EA, Coet2 CPAs, P.C.

Julia Bourlakov, Financial Advisor, Edward Jones Investments

Eileen R. Kennedy, Reverse Mortgage Specialist, Reverse Mortgage Focus

Lucila A. Williams, CFPA, ISIS Financial Group

Quote of the Quarter:

"*Never limit yourself because of others' limited imagination; never limit others because of your own limited imagination.*"
~ Mae Jemison, astronaut

2013-2014 Board Members

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WEPC Sponsorship Opportunities!

Sponsorship opportunities are now available for members. For a sponsorship of $500, you will receive:

- Organization's name displayed on the WEPC website and in the meeting Evite
- Organization's name will be announced at the meeting as the sponsor
- Organization's name and logo will be displayed at the meeting as the sponsor
- Ability to place marketing materials at the sign-in table for members
- 5 minutes to talk about your organization at the beginning of the meeting

Interested or want more information? Contact Becky Theis, PR Committee co-chair, at 303-376-3890. More information coming soon to the WEPC website!

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!

Are you LinkedIn?

Join the WEPC LinkedIn Group – www.linkedin.com

1. This is a private group, viewable only by WEPC members.
2. It's a great forum to connect with other WEPC members outside of the monthly meetings.
3. We encourage you to start a discussion, ask a question, request a referral, or post an article of interest to the members of the WEPC.
4. Please use this site to share our collective knowledge and experience, and help the WEPC continue to grow.