



Women's Estate Planning Council Update

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

President's Message

Kristin Piñeiro, Esq., Wallace Scott, PC



Wow! It's hard to believe it's been almost a year since my term as WEPC President began for the 2013-2014 year. While things have calmed down considerably on the estate, gift and generation skipping transfer tax front (compared to the end of 2012!), we have had other changes in the law to learn about over the past year – the Affordable Care Act and the new Colorado Premarital and Marital Agreement Act are just a couple of examples that come to mind. As the ONLY women's estate planning council in the country, we are proud to provide timely programming on topics that are relevant to our members in their professions. We are even prouder to say that many of our speakers are our own members! Our Programs Committee is always looking for great topics to present to our group (and we like to give our own members the opportunity to speak first) so if you have a presentation that you think would benefit our group, please contact one of our Programs Committee Co-Chairs (currently Arlene Barringer and Julie Fletcher).

Speaking of committees, elections for our new officers and committee chairs for the 2014-2015 year are drawing near. Please consider nominating someone (or yourself) for an officer position or committee chair. I think that you will find that it really is the best way to get the most of your WEPC membership. It is a great time to be a member of the WEPC and an even better time to be a part of the leadership that helps guide our amazing organization. If you are interested in a board position, please contact Connie Smith (our past President and Nominating Committee Chair) or any current board member.

Another great way to get more involved in the WEPC is by being a sponsor – it is also a good way to get some exposure for your organization. Please see the WEPC webpage for more information (<http://www.wepc.net/sponsorships.html>) or contact Becky Theis, PR Committee Co-Chair.

Finally, the WEPC continues to thrive and grow. If you have any colleagues that you think would benefit from what our council offers, please encourage them to come to a meeting – new members and guests allow us all to grow personally and professionally and in turn, help us to serve our clients and each other better.

I look forward to another year of great speakers, networking and learning!



Spotlight on Program Chair

Arlene S. Barringer, Esq., Glatstein & O'Brien, LLP



1. Tell us about your career.

- I have been practicing law since 1995. I began my career at a law firm specializing in civil defense litigation. In 2000 (after my third daughter was born), I transitioned into the area of wills, trusts and estate planning. In 2009, I joined Glatstein & O'Brien LLP, an Elder Law, Estate Planning, Protective Proceedings and Probate and Trust Administration Law Firm. I represent respondents, family members and professional fiduciaries in guardianship, conservatorship, and probate estate proceedings. My work includes both contested and uncontested cases. In addition to representing individuals, I accept Court appointments and serve in the role of Guardian ad Litem, Court-Appointed Counsel and Post-Appointment Court Visitor in Guardianship and Conservatorship proceedings. I also prepare wills, trusts, powers of attorney, medical directives and special needs and discretionary trusts with a goal of preserving public benefits for incapacitated individuals.

2. Where did you go to school?

- I received my Bachelor's degree from Texas A & M University in College Station, Texas. (To those WEPC members who are Aggies, "Gig'Em"!) After moving to Denver, I attended University of Denver Sturm College of Law while working, and graduated from DU Law in 1995.

3. Where is your dream travel destination?

- Italy! I would love to travel throughout Italy on an extended romantic getaway with my husband and experience the countless towns and countryside, and all they have to offer: magnificent art, rich culture, historical monuments; beautiful cathedrals, ancient ruins, dramatic coastlines, seaside restaurants, beaches, mountains, amazing food and great wine!

4. Who is your role model and why?

- Over the years I have had the privilege of meeting and working with many wonderful people who have mentored and inspired me. It is difficult to single any one person. I am extremely grateful for all who have taken the time to answer questions and mentor me and continue to do so. These people inspire me to take the time to help others and serve the elder law community. I also am inspired daily by my three beautiful daughters, ages 15 to 22.

5. Why did you join the WEPC and what is your role on the WEPC Board?

- I joined WEPC to socialize and collaborate with women professionals in the area of estate planning and elder law. What I did not expect was forming deep friendships with so many brilliant and fabulous women in WEPC. Julie Fletcher and I serve on the Board as Programs Co-Chairs, which means we plan the monthly educational programs that are typically approved for CE credit, including CLE, CE (Insurance), CFP and CPA credit. In order to receive the CE approvals, we ensure the programming focuses on more advanced substantive issues with a broad appeal to our members and does not appear proprietary. To all those interested in volunteering for a committee (including Programming) or serving on the Board – go for it! To all those who have served on the Board in the past, thank you for making WEPC what it is today!

Spotlight on New Member

Catherine Asmus, Coet & Coet, PC, CPAs



1. Tell us about your career

- My career started in Los Angeles at Grey Advertising working as audit support for large corporate accounts such as Orion Pictures and Caesars Palace. Once I was married and moved back to Denver, I began working with York Automatic Snow, a wholly owned subsidiary of York International based in York, PA. As their in-house accountant (as well as the only woman and American in the Denver office), I worked preparing financial information in both English and French (one of the reporting centers for the division was in Nantes, France). After seven years with York, I decided to work part-time with a small engineering firm to stay at home with my three small children. In 1998, I had an opportunity to work with a local CPA firm - Coet2 CPAs - on a part time basis, then as a part of staff and now as a partner. I have continued my work with Coet2 CPAs learning, developing and honing my expertise with tax, specifically business tax. I am looking forward to the years ahead and the new challenges and experiences to come.

2. Where did you go to school?

- I attended the University of Denver from 1983 to 1987, graduating with a BSBA in 1987. Prior to DU, I attended high school in London, England at the American School in London. I spent my junior high and high school years overseas while my father worked for Carnation International. I have continued my education with accounting classes at Metro and also at University of Phoenix. I have since earned my EA (Enrolled Agent) and CPA licenses.

3. Where is your dream travel destination?

- My dream destination would be anywhere my family is. I have a wonderful husband and three great kids (all graduating this year – two from college and one from high school). Any destination with them is a great adventure.

4. Who is your role model and why?

- I have several role models, two of which I'll mention. Fran Coet, whom I have worked with for 15 years, has been an extraordinary mentor. She has helped me to find my career in tax preparation with the mantra of doing the right thing for the right reason. She continues to be an inspiration to what can be accomplished, learned and shared with others by making a focus in tax and accounting a life's passion. I am sure those of you who know Fran will agree with my sentiments! My mother has also been a role model for me. Married in 1955, she was a home-maker as was the expectation. Once all the children were raised, she became a very successful real estate agent and business woman, transforming herself and astonishing both her husband and children with her accomplishments.

5. Why did you join the WEPC?

- I joined WEPC to be a part of a professional women's group interested in the promotion of financial education and wellbeing of our clients. I have much to learn and hopefully something to share with others in the group. I look forward to getting to know each member.

NAEPC Update

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

One of the perks of being a member of the Women's Estate Planning Council is that 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.

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

Professional estate planners can be accredited through NAEPC for 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 recognize estate planning professionals who meet special requirements of education, experience, knowledge, professional reputation, and character. WEPC can nominate one person from each discipline per calendar 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.

If you would like further information on how to qualify for one of the designations available, please send me an email at nroth@csbt.com or give me a call at 303-864-7226.

Quote of the Quarter

I attribute my success to this: I never gave or took any excuse
-Florence Nightingale



Programs and Community Events

In December we had our annual Holiday Party at Vinue Food & Wine Bar. A big thank you to Hayley Meyer and Sara Jones for organizing this fabulous event!

January Meeting:

WEPC member, Fran Coet, CPA, of Coet & Coet, PC, presented her comprehensive Annual Tax Update. Fran enlightened us about the new tax laws and how they will effect our business and our clients.



February Meeting:

Jim Bailey, shareholder and attorney, and Riley Madden, associate attorney of Senn Visciano Canges, P.C. presented “Ten Things You Need to Know about the Premarital and Marital Agreement Act”. He provided an overview of the new law that changes the definition of the marital agreement and the impact on how estate planners and financial planners serve their clientele.



March Meeting:

Katrina Jones, attorney at Katrina S. Jones, P.C. and Deputy Public Administrator for Adams County, and Paulette Wisch, CML at Universal Lending Corporation, presented “*Real Estate Issues in Estate and Financial Planning as We Age.*” Katrina enlightened us with a presentation including titling of real estate, the unintended consequence of transfers of real estate, and real estate issues in Medical planning. Co-presenter Paulette Wisch, explained current regulations regarding reverse mortgages.



Thank you to all of our speakers!

DON'T MISS THESE UPCOMING PROGRAMS!

April Meeting: Thursday April 10, 2014

“*Pet Trusts and Estate Planning To Provide For the Care of Your Pets*” presented by attorney Bette Heller, of Bette Heller, P.C. Bette, an experienced estate planning attorney, was instrumental in the drafting of the current Colorado "Pets Trust" Statute, allowing people to leave money in trust for the care of their pets should the person become incapacitated or die.

May Meeting: Thursday May 8, 2014

“*Dealing With Unknown or Unascertained Parties in Trust and Estate Matters*” presented by attorney Melissa Schwartz of Steenrod, Schwartz & McMinimee, LLP Hear from Melissa Schwartz in her role as Public Administrator about the myriad of issues to unravel when there are unknown or unascertained heirs to locate in a trust and estate matter.

WEPC Sponsorship

Lee McCue sponsoring February's meeting.
The McTeam, www.mcteamrealestate.kwrealty.com



Please consider being a sponsor for one of our fantastic WEPC meetings. Opportunities are now available for our members. For a sponsorship of \$500.00, 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 and guests.
- ✓ 5 minutes to talk about your organization at the beginning of the meeting.

If you are interested or would like more information, please contact Becky Theis, PR Committee co-chair at 303-376-3890.

Good News from Our Members!

Becky Theis will be serving as the 2014-2015 President-Elect for the Junior League of Denver after serving as Community Vice President for two years.

Amy Symons, of the Law Office of Amy E. Symons, was awarded *40 under 40* recognition by the Denver Business Journal.

On the Move

Julie Davis, Esq. joined Katz, Look & Onorato, P.C. and is practicing in the areas of estate planning, estate administration, and trust administration.

Jordan Ausman, National Planning Corporation, merged her financial planning practice with Peter Coleman, J.D. and formed Progress Financial Planning.

Constance D. Smith is an attorney at Fairfield and Woods, P.C. and is pleased to announce that they have moved their office, which is now located at 1801 California Street, Suite 2600, Denver, CO 80202.

Members Speaking Out

Elizabeth A. Bryant, attorney at Elizabeth A. Bryant, P.C., will be speaking at the Probate Litigation Practicum, Trust & Estate Spring Update, hosted by the Colorado Bar Association on April 4, 2014.

Eileen Kennedy of Reverse Mortgage Focus conducts ongoing CE classes for Realtors and CFPs.

Kirsten Jacobs, attorney at The Law Center P.C., was published in the Certified Senior Advisors Journal for her article "The Durable General Power of Attorney: Friend or Frenemy?"

Our Member Community Involvement

WEPC members are involved in a lot more than the WEPC. We hope that this list provides an opportunity for all of our members to get to know one another and find common interests with each other.

Mary Milan Bock – Vice President of the Northwest Denver Council for Seniors.

Julia Bourlakov – President of Harvey Park Improvement Association. Member of American Business Women Association, Zonta International and Optimist Club. Supporter of Colorado Center for the Blind and Rocky Mountain Children's Law Center.

Sheryl Brake – Board member of YWCA of Boulder County. State Chapter President of National Association Certified Valuators & Analysts. Susan G. Komen.

Barbara Cashman - 2013/2014 chair of the CBA Solo-Small Firm Practice Section.

Darla Daniel – Elected to serve on the Colorado Lawyer Board of Editors and the University of Colorado Law Alumni Board. *If you have any ideas for Colorado Lawyer articles, or job opportunities for new law graduates interested in trust & estate work, let Darla know!*

Mira J. Fine – Historic Denver, Denver Estate Planning Council, Advisory Board for Children's Hospital, National Jewish, Rose Community Foundation, AXA Editorial Board for CSPCA.

Julie Fletcher – Volunteer with Upstream Impact, a nonprofit helping families in Northeast Denver lead their way out of poverty.

Erica Johnson – Denver Mayor's GLBT Commission. Received Denver Foundation Philanthropic Leadership Award in 2012.

Eileen Kennedy volunteers with Single Volunteers of Greater Denver, Dani's Foundation, Bessie's Hope, and Hearts n' Horses.

Deborah O'Neil – Board of the Colorado Women's Bar Association, Co-Chair of the Publication Committee. Board of Trustees of the CO-WY Chapter of the National Multiple Sclerosis Society.

Les Simpson, Denver Director CXO Collective Private Equity Group and is the on the Legislative Committee of the Commercial Real Estate Association and is the GM Chairman of the TiE Rockies.

Becky Theis, Lisa Hardin, Amy Symons, Hayley Meyer, Kirsten Jacobs, and Kim Raemdonck are members of the Junior League of Denver.

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.

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.

Welcome New Members!

Maggie Kirchhoff, CFP, Wisdom Wealth Strategies

Joanna C. Kitto, Attorney, Ambroziak Kitto P.C., Free Range Title L.L.C.

Karen DeLeeuw, MSW, CSA, Seniors Helping Seniors

Jennifer Collins, CFP, Trust Officer, Steele Street Bank & Trust

Amy M. Kane, CPA, The Private Client Reserve of U.S. Bank

Emma Lor, Attorney, The Law Office of Emma B. Lor, 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!

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.

2013-2014

Board Members

President: Kristin Piñeiro
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