Women's Estate Planning Council Update

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

Outgoing President's Message

Kristin Piñeiro, Esq., Wallace Scott, PC

For my farewell message as your outgoing President, I would like to thank all of the board members who served during the 2013-2014 year. I feel very fortunate to have had the opportunity to work with each and every one of them. The next time you see them, please be sure to give them a big thank you! I truly appreciate all the time and hard work they put in to making this a wonderful organization for all of us.

In particular, I would like to thank the outgoing officers and co-chairs who have completed their terms during the 2013-2014 year:

Our Immediate Past President, Connie Smith, put together our slate for the 2014-2015 election with the help of her committee, which included former Presidents Erica Johnson and Darla Daniel.

Nora Roth has served for numerous years as our NAEPC Liaison and has kept us informed on all the NAEPC opportunities, including bringing in national speakers and assisting in the nomination process for members wishing to become an Accredited Estate Planner.

Arlene Barringer has chaired our Programs Committee for several years and always has outstanding speakers lined up for our monthly meetings to keep us informed and up-to-date on current issues in the estate planning community. (P.S. – thank you Arlene for agreeing to serve another 3-year term as our Vice President, President and Immediate Past President!)

Lisa Perry has led our Membership Committee for several years and has screened all of our membership applicants, welcomed our new members, and kept our name tags organized and guest fees collected at each meeting.

Becky Theis has served as our Public Relations Co-Chair and, among other things, has been instrumental in coordinating our various outreach events. This past year, the Women's Bean Project visited one of our meetings and was a huge hit!

Sara Jones has served as our Hospitality Co-Chair and has worked with our caterer to be sure that we have delicious dinners for all of our meetings, in addition to bringing plenty of refreshments to each meeting.

And, an extra big "thank you" to Vickie Wilson and The Denver Foundation for allowing us to continue using The Denver Foundation's Community Room. It is certainly nice to have state-of-the-art technology for our speakers and a beautiful view of the mountains during our monthly meetings.

Finally, congratulations to our newly elected board – I know that our organization will be in very capable hands over the next year. And now, I'd like to pass the gavel to our new President, Barbara Tocker Ross!

Incoming President's Message

Barbara Tocker Ross, Esq., Susan R. Harris & Associates, LLC

"*I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.*" ~ Maya Angelou

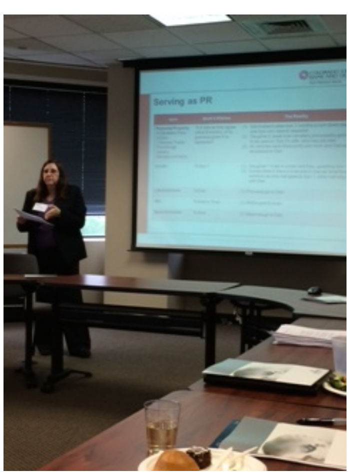
I am saddened by the news of Maya Angelou's passing, but these words, and so many other memorable and empowering words Ms. Angelou wrote and spoke, will continue to inspire us for years to come.

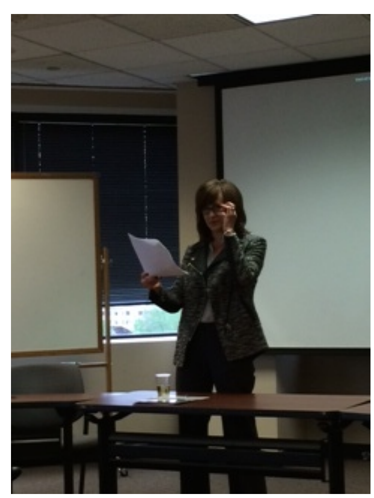
In our professional lives, the interactions we have with our clients and our colleagues can have a profound effect on all. One of the most rewarding moments in my workday is receiving an e-mail or a handwritten thank you note from a client expressing gratitude for treating her or him with care, kindness and respect. These expressions of appreciation remind me why I do what I do, and it feels good!

Along those lines, one of the reasons I enjoy begin a part of the WEPC (and there are many!) is the way I feel about the being involved in this group. I look forward to our monthly meetings as a time to connect with my colleagues and friends, to have social as well as professional interactions and to support and be supported by some of the highest caliber women I know. My hope is that each of your involvement in the WEPC is an experience that is meaningful and relevant for you. If you have ideas for improving our organization, please share your thoughts with me or one of our incredible Board members. We are here for you.

As we approach the WEPC's twenty year anniversary in 2015, I look forward to celebrating the growth and successes of our organization. We have grown from a small group of women from the financial service, accounting and legal areas who came together in 1995 to 100 members! WOW! I encourage you to help our group continue to grow, by inviting others to join, and getting involved with our organization by volunteering for a committee, helping to plan programs and events, or helping our PR and newsletter team.

THANK YOU to Past President Kristin Piñeiro, other Past Presidents and our Board Members for their commitment and efforts to make the WEPC an organization we can all be proud to be members of. Finally, thank you for the opportunity to serve you as President this year. I look forward to a great year for the WEPC and getting to know all of you better.





Spotlight on Secretary

Laurie A. Hunter, Esq., Wade Ash Woods Hill & Farley, P.C.

1. Tell us about your career.

- I graduated from DU law school in 1981, after having worked as an estates & trusts paralegal from 1977 to 1981, most of which occurred while I was attending law school. I started out with Hindry & Meyer, P.C. as a paralegal and then for one year as an attorney. It was having to punch a time clock as a paralegal that sent me one day over to DU law school to pick up an application. I had attended the Institute for Paralegal Training in Philadelphia, Pennsylvania in 1976. At that time, it was one of the few paralegal institutes in the country, and they guaranteed job placement. I knew nothing about the law prior to going to the institute, but one of my cousins had attended the school. Hindry & Meyer specialized in funded revocable trusts for probate avoidance (due to Colorado's onerous probate procedure prior to adopting the Uniform Probate Code in 1974).

  In 1982, I moved to Holme Roberts & Owen, and spent five years at that firm. At that time, the larger firms would hire a fairly large class of young attorneys (25 or so) and train them by having them rotate through each of the four major departments for the first two years, to gain experience in different areas of law. I'm not sure that happens anymore, and it is unfortunate, because I feel that I gained much valuable training and experience from my years at HRO. After rotating through the Corporate and Natural Resources departments (I avoided litigation), I spent most of my time at HRO in the Tax Department, learning estate planning from Jean Stewart, Don Hopkins, and Jud Detrick. I also made valuable contacts from friends I made while at HRO that have helped me with referrals through the years.

  In 1987, after oil and gas went bust and Denver was in a recession (and work for young attorneys was hard to find to meet our billable hour requirements of "only" 1600 per year; I realize the larger firms are closer to 2000 now), I moved for one year to Minor & Brown, which gave me some great experience with a smaller firm and the concept of "marketing" (unheard of while at HRO). I then spent five years working with Steve Hutchins, first at Baker & Hostetler, and then at Gorsuch Kirgis.

  So after about 11 years at large firms, I was ready to leave the practice of law and the billable hour requirements, "management committee" mandates, etc., but a mutual friend told me that Kevin Millard needed an associate. I joined Kevin (who had left Roath & Brega to become a sole practitioner) in 1993, and we worked together for 10 years. I loved working in a two- attorney firm, and we added an associate, so had three attorneys for most of our years together. I was Chair of the Trust & Estate Section of the CBA in 1997/1998 and was elected as a Fellow to the American College of Trust & Estate Counsel in 1998.

  But in 2003, Kevin decided to go on his own, and I joined Wade Ash Woods Hill & Farley. I had known a number of the attorneys there, especially with respect to my work with the Trust & Estate Section of the CBA, and I was happy to join this firm. It was a great career move to be with a firm with half the attorneys that LOVE probate litigation (I do not), but also it is big enough to give me associates to cover my practice so I can go on vacation.

  Throughout all of my firm changes, I continued to volunteer for committees with the Trust & Estate Section of the CBA, and I received the Richard Doyle CLE Award of Excellence in 2012. Over all, it has been a terrific career, and although I started out as an archaeology student at college and through one year of graduate school, I am glad to have been an estate planning attorney. Every family is different, and the tax laws keep changing often enough to keep life interesting, plus I have been able to support myself and my family.

Spotlight on Secretary Continued

Laurie A. Hunter, Esq., Wade Ash Woods Hill & Farley, P.C.

2. How do you spend your time when you are not working?

- My children are ages 25 (Melanie) and 22 (Ian) now, so when they were younger, a LOT of my time was consumed by Girl Scouts (a leader for 10 years), Boy Scouts, marching band fund- raising and attending band competitions, swim team, school activities, family camping and back- packing vacations, and the like. Now that I am finally past a lot of kid activities, I continue to enjoy RV camping (not so much backpacking now), reading, swimming, traveling, and I am on my church's endowment committee, and have been a precinct captain for the Douglas County Democrats.

3. Why did you join the WEPC and tell us about your role on the WEPC Board.

- I originally attended WEPC back in the 1990's and spoke one or two times, but when my children were young, it was difficult for me to attend evening meetings. I was a program co-chair in 2005 and 2006, and now am secretary. I have very much enjoyed my time as a member of the Board. It is the best way to get to know some of the other members of WEPC. I love the social nature of the group, and getting to know not only other women attorneys, but also women accountants, financial advisors, investment advisors, and other professional women outside the legal community.

4. Tell us something unique about yourself.

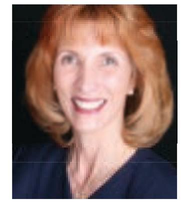
- In college and my first year of graduate school, I was an archaeology student and attended digs in the jungle of Guatemala at a Mayan Classic site (Yaxha in 1973), and a Pueblo Indian site in northern Arizona (1975). I continue to be fascinated by history and archaeology, and love to travel to places to indulge those interests. It may be one of the reasons I love the history behind estate planning (such as the Statute of Wills in the 1500s in England) and real property (some concepts go back to feudal England).

5. Where are you originally from, and if not from Denver, why did you move?

- I am from a small town (Murrysville) near Pittsburgh, Pennsylvania. I attended Carnegie-Mellon University in Pittsburgh, for college. After I left graduate school in Santa Barbara, I moved to Colorado in 1975 because two of my sisters had already moved here. When my eldest sister moved to Denver in 1970, we were shocked. None of us had been west of Ohio. But after our first backpacking trip to the Gore Range in 1973, we were hooked. Although during my first couple of years the constant sunshine was difficult to adjust to, now I could not live anywhere else. My sisters and most of my nieces, as well as my children, are still in Colorado.

NAEPC Update

By Maggie Mitchell, JD, CLU® ChFC® AEP® Vice President Advanced Sales, ING U.S.



As a member of the Women's Estate Planning Council, you are also a member of the National Association of Estate Planners & Councils (NAEPC). Joining the Women's Estate Planning Council is a terrific first step, but have you considered joining a group of professionals who recognize the need to stand out in the estate planning crowd by obtaining your AEP® designation?

NAEPC has almost 2,000 AEP® designated professionals nationwide. Why should you also consider becoming an Accredited Estate Planner®? The AEP® designation gives you:

- **A competitive edge**…more often than not success requires setting yourself apart from the competition
- The ability to demonstrate that you have **special knowledge, skill, and expertise** in the field of estate planning
- The ability to give prospective and existing clients a way to **identify you as a qualified estate planner** who is able to meet their needs

What does it take to get this designation? An abbreviated list of qualifications and requirements includes:

- Credential - active license or certification as an attorney (JD), accountant (CPA), insurance professional and financial planner (CLU®, CFP®, ChFC®), or trust officer (CTFA)
- Experience - minimum of 5 years of experience in estate planning
- Education - applicants must successfully complete 2 graduate courses from The American College or similar graduate courses through an accredited university, college or school of law as part of a masters' or doctoral degree program (a minimum of 15 years of experience in estate planning exempts one from this requirement)
- Membership - applicants must be a member of an affiliated local estate planning council
- Reputation & Character - an applicant must provide 3 professional references; one of whom must share the same primary discipline and 2 others must be from 2 different disciplines
- Continuing Education - an applicant must have a minimum of 30 hours of continuing education, 15 of which must be in estate planning, every 24 months
- Ethics - applicants must sign a declaration statement to continuously abide by the NAEPC Code of Ethics
- Core Mission - applicants must acknowledge a commitment to the team concept of estate planning

Interested in learning more? Please send me an email at Maggie.Mitchell@us.ing.com or give me a call at 303-886-3984.

Quote of the Quarter

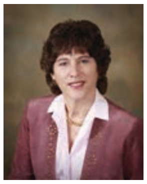
"Define success on your own terms, achieve it by your own rules, and build a life you're proud to live."

~ Anne Sweeney

Programs and Community Events

April Meeting:

Bette Heller of Bette Heller, P.C., an experienced estate planning attorney who was instrumental in the drafting of the current Colorado "Pet Trust" statute, presented *"Pet Trusts and Estate Planning To Provide For the Care of Your Pets."*

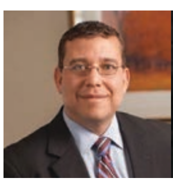
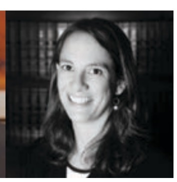


May Meeting:

Melissa Schwartz of Steenrod, Schwartz & McMinimee, LLP, presented "*Dealing With Unknown or Unascertained Parties in Trust and Estate Matters.*" Melissa Schwartz is a Public Administrator and explained the myriad of issues to unravel when there are unknown or unascertained heirs in a trust and estate matter.

June Meeting:

Shane E. Phillips, Director of Wakefield Assets Management and Board member of Heartlight Center, and Karen Shirley of Holmes Shirley Law, presented *"Tools for Handling Financial Matters After the Death of a Loved One"* and discussed estate and financial planning in the event of an unexpected and sudden death.

Thank you to all of our speakers!

Programs and Community Events Continued

DON'T MISS THESE UPCOMING PROGRAMS!

July Summer Picnic: July 10, 2014

The Women's Estate Planning Council's Summer Fiesta!

¡Hola, señoras, señoritas, and señores alike!
To Marg's Taco Bistro you should hike.

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Come enjoy tacos, margaritas, and churros so yummy.
You'll leave with a smile and a happy tummy.

~

Indeed, on July 10th, pass on an afternoon siesta,
So that you can come enjoy our nighttime fiesta!

WHERE
Marg's Taco Bistro
Uptown Location
500 East 19th Ave.,
Denver, CO
*Lot and Street
Parking Available

WHEN
Thursday, July 10th
5:30-7:30pm

WHY
Do you need a why?

August Meeting: August 14, 2014

Lisa Perry and Stephen Sullivan, Shareholders of Welborn, Sullivan, Meck & Tooley, will be presenting on *"Owning Oil and Gas Interests in an Estate" and "Fracking in Colorado."*

WEPC Sponsorship

Nora Roth and Holly Sutton of Colorado State Bank and Trust sponsored May's meeting.
https://www.csbt.com

COLORADO STATE BANK AND TRUST® N.A.

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 Lisa Hardin, PR Committee co-chair at lhardin@lisahardinlaw.com.

Good News from Our Members!

Lee A. McCue, of the McTeam at Keller Williams Realty, was awarded the South Metro Denver Realtor Association Diamond Circle Award for being a top producer for 2013.

Maura Spangler, of Silver Hill Partners, added a Colorado Property and Casualty License to her Life and Health Licenses and is excited to assist clients with their home, auto, or life insurance coverage, in addition to disability, long term care and commercial coverage.

On the Move

Hayley Meyer joined the law firm of Steenrod, Schwartz & McMinimee as an Associate Attorney and practices in the area of estate administration.

Lisa Hardin, Attorney at Law Office of Lisa Hardin, LLC, has joined Louis J. Davis, P.C. as Of Counsel and practices in the areas of estate planning, tax planning, estate administration, and guardianships/conservatorships.

Members Speaking Out

Constance D. Smith, Attorney at Fairfield and Woods, will be speaking on "Terminating Charitable Trusts" at the Planned Giving Roundtable meeting on September 19, 2014, at 11:30a.m. at the Denver Foundation's Community Room.

Roseanne Collison, of All The Comfort of Home, Inc., presented "Suicide and the Terminally Ill Patient" in April at the Life Quality Institute Annual Palliative Care Social Work Conference in Denver.

A few of our members presented at the 4th Annual Jefferson County Senior Law Day on June 7th. Barbara Cashman, Attorney at Barbara Cashman, LLC, presented on "Financial Powers of Attorney and Conservatorships," Lisa Eastin, Attorney at Buchanan & Stouffer, PC, presented on "Estate Planning Basics," and Ayo Labode, Attorney at The Law Offices of Ayo Labode, presented on "A Consumer's Guide to Choosing Nursing Homes and ALFs."

Debbie Reinberg, Geriatric care manager/guardian and elder mediator of Eldercare Mediators, will be presenting on "Facilitative Elder Mediation" at the Elder Law Conference in Vail on August 21st.

Joanna Kitto, Attorney at Ambroziak Kitto PC, Free Range Title LLC, will be presenting on Elder Law at the Golden Chamber of Commerce Breakfast on July 9th.

Arlene Barringer, Attorney at Glatstein & O'Brien LLP, is the Co-Chair of the 6th Annual Elder Law Retreat hosted by the Colorado Bar Association at the Marriot Mountain Resort in Vail, CO from August 21-23, 2014. Please consider attending the retreat.

Darla Daniel, Vice President and Trust officer at Colorado State Bank and Trust, will be presenting on "Balancing Flexibility and Constraint in Trust Administration: Not Too Hot, Not Too Cold, But Just Right" at the 34th Annual Estate Planning Retreat.

Elizabeth A. Bryant, Attorney at Elizabeth A. Bryant, P.C., was the Program Chair of the 34th Annual Estate Planning Retreat, and presented the Welcome and Introduction at the retreat.

Arlene Barringer, Attorney at Glatstein & O'Brien LLP, will be presenting on "Basics of Guardianship and Conservatorship proceedings" at the Elder Law Basics CLE on July 17th.

Celebrations

Barbara Tocker Ross, Attorney at Susan R. Harris & Associates, LLC, welcomed a new addition to her family and brought her son, Bence ("Benny"), home from Hungary. Congratulations, Barbara!

Vickie Wilson, PhD., of The Denver Foundation, welcomed her first grandson Declan Dale Alexander Hendricks, (7 pounds and 19 inches long, also known as DDAH), to the world on May 7th. Congratulations, Vickie!

Lee A. McCue, of The McTeam/Keller Williams Realty, is pleased to announce that her son, Andrew, is graduating from the University of Washington with a BS in Finance and will be pursuing his JD, MBA in Finance, and LLM at Emory University in Atlanta this August. Congratulations, Lee!

Maura Spangler, of Silver Hill Partners, is proud to be celebrating the 11th anniversary of Firefly Autism House, which helps treat children with autism, as one of its Founders in 2003.

Megan Brand, of Colorado Fund for People with Disabilities, is excited to announce that Colorado Fund for People with Disabilities (CFPD) celebrated their 20-year anniversary in March at the Denver Museum of Nature and Science where they honored their founding board members and greeted over 300 guests.

Kirsten Jacobs (now Kirsten Waldrip!) was married on June 21st to her husband, Jason, at the Cherokee Ranch and Castle in Sedalia, Colorado.

Sad News

Roseanne Collison, of All The Comfort of Home, Inc., had her second son, Michael Jair Collison, born on June 8, 2014 at 9:44 a.m. and passed away at 10:04 a.m. Roseanne was 28 weeks along and knew that Michael had a serious genetic disorder, but she felt that by carrying him she gave him the gift of life and her family also received him as a special gift with the 20 wonderful minutes that they had together.

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!

Delaney Keefe, Attorney at Law Office of Delaney A. Keefe.

Heidi Gassman, Attorney at Higgins Hopkins McLain & Roswell, LLC.

Angela Herrick, Attorney at Crestone Capital Advisors.

Lisa Davis, CFP, ChFC, at The Madison Group, Inc.

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.

Welcome 2014-2015 Board Members!

President: Barbara Tocker Ross
Barbara@srhassoc.com

Vice President: Arlene Barringer
Arlene@denverprobatelaw.com

Past President: Kristin Piñeiro
kpineiro@wallacescottlaw.com

Secretary: Laurie A. Hunter
lhunter@wadeash.com

Treasurer: Beth Staudenmaier
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hsutton@csbt.com

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Lisa Hardin
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