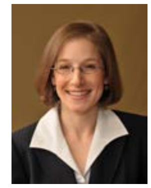
Women's Estate Planning Council Update

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

President's Message



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

Happy Fall! This is my favorite time of year – watching the leaves change to vibrant yellows, reds and oranges, and enjoying the smells and tastes of fall, in particular pumpkin and apple. There are lots of changes this time of year - please keep us updated on the changes in your life too! You can send PR Committee Co-Chair Kirsten (Jacobs) Waldrip (kjacobs04@gmail.com) your work and personal updates, including job changes, honors and awards, speaking engagements, life events and trips. Our PR Committee has been hard at work distributing quarterly newsletters for almost two years now and it has been wonderful to read about the happenings in the lives of WEPC members.

As our community event this year, the WEPC participated in the Walk to End Alzheimer's at City Park on September 20th. Our team raised over $1,600!! According to Jill Lorentz at the Alzheimer's Association, they expect this to be a record-breaking year, and I'm proud that we are a part of this. Thank you to all who supported our team and the Alzheimer's Association and a big thank you to our team – WEPC members Julie Fletcher, Lisa Hardin, Angela Herrick, Laurie Hunter, Lauretta Moell, Kim Raemdonck, Connie Smith and Maura Spangler, former WEPC member Merry Balson and her family, and Bence Ross. It was great to see WEPC member Roseanne Collison there as well, walking for her company. Check out the photos in this newsletter! Hopefully we can make this an annual event.

Welcome to all the new members who have joined the WEPC this year. Please take the opportunity to introduce yourself to these new members and to others you don't know yet. Name tags for new members have a star so that you can easily spot them. ☺ All our members are listed on the WEPC website, and we recently added a job board where you can post job openings for any positions at your firm or financial institution or company. If you haven't joined the WEPC LinkedIn Group, please do. This is a closed group, limited to current WEPC members, and it is a great forum for members to ask questions as well as share information with one another outside of meetings. Happy connecting!

Spotlight on Membership Co-Chair

Melissa Dyer, CFP ®, MBA

RAYMOND JAMES

1. Tell us about your job.

   ➢ I am a Certified Financial Planner® professional with Raymond James, a nationally recognized investment management and financial planning firm; I have been a financial advisor since 1996. I thoroughly enjoy working with clients, and their families, to develop long term financial and investment plans to meet changing market and personal conditions.

   On a typical day, I may be on the phone helping a client choose the most appropriate stock or bond to meet his or her needs, and then moving on to meeting with an elderly client to determine the best way to put his favorite grandson through college. Later, I may spend some time evaluating a recent widow's financial situation to develop an investment and income plan to meet her financial needs. One of the best compliments my clients can pay me is when they refer a family member to me. I am honored to be selected as a Denver Five Star Wealth Manager in 2012, 2013, and 2014*, as seen in Colorado's 5280 and COBIZ Magazines.

2. What is your dream travel destination?

   ➢ I love to travel and am very interested in archaeology. I just returned from an archaeology tour of southern Italy. My dream travel destination has always been to visit the monuments of ancient Egypt. Ever since I saw the Agatha Christie movie "Death on the Nile" as a youngster, I have dreamed of cruising down the Nile and seeing Luxor and the Great Pyramids of Egypt.

3. Why did you join the WEPC and what inspired you to become a board member?

   ➢ I joined WEPC to be informed about Estate Planning issues that affect my clients and to network with other estate planning professionals. After attending several meetings, I was very impressed with the high level of programs offered by WEPC, and decided that I wanted to help further the goals of the organization.

   As Membership Co-Chair, I am able to help WEPC grow its membership, meet with and assist new members and guests, and answer any questions members may have. I especially enjoy the opportunity to meet new people, and help them to feel welcome at our meetings, and through follow up calls.

4. Tell us something unique about yourself.

   ➢ I was a competitive ice skater growing up, and trained in Lake Placid, NY, from the age of 9 until I left for college to attend The University of Colorado. I qualified to compete at the Senior Figure Skating level and received a USFA Gold Medal in Figures and Free Skate. I then coached figure skating in Colorado while attending both undergraduate and graduate school at CU. I left figure skating after completing my MBA and going into business. Figure Skating taught me many life lessons, such as being hard working, focused, and learning to deal with the ups and downs that life brings you.

Spotlight on Membership Co-Chair Continued

5. What is one piece of advice you would give someone starting out in your career field?

   - In addition to demonstrating strong analytical and people skills, I think it is very important to participate in a good training program, or work with a seasoned Financial Advisor, when starting out in this field, and to always remain teachable. Early in my career, I had the opportunity to do both. I continuously engage in continuing education, and collaborating with colleagues. I truly believe that an elite financial advisor needs to be continually growing, and always be open to new ideas in the dynamic Financial Planning and Wealth Management field.

Raymond James Financial Services, Inc., Member FINRA/SIPC is not affiliated with WEPC. 10463 Park Meadows Drive, Suite 115, Littleton, CO 80124 303-792-7340 Ext #2

**2014 criteria:* Objective selection process: Award candidates are evaluated against10 objective eligibility and evaluation criteria: 1) Credentialed as an investment advisory representative (IAR) or a registered investment advisor; 2) Actively employed as a credentialed professional in the financial services industry for a minimum of five years; 3) Favorable regulatory and complaint history review; 4) Fulfilled their firm review based on internal firm standards; 5) Accepting new clients; 6) One-year client retention rate; 7) Five-year client retention rate; 8) Non-institutionalized discretionary and/or non-discretionary client assets administered; 9) Number of client households served; 10) Educational and professional designations.

WALK TO END ALZHEIMER'S
alzheimer's association

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 Monday before each meeting. Guests may R.S.V.P. and pay online, at www.wepc.net/meetings.

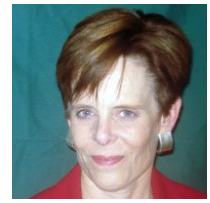
Meetings

- 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

Spotlight on WEPC Member

Lisa Eastin, Attorney, Buchanan & Stouffer, P.C.



1. Tell us about your career.

   - I practice a mix of estate planning and administration, special needs planning and elder law with a bit of business succession planning thrown in. My version of elder law includes conservatorships and guardianships for special needs adult children or elderly parents, guidance in the midst of a family crisis or advice following the discovery of elder financial abuse. My work always includes a major dose of client education, providing resources and a global planning view for that child, parent or sibling requiring special care. This is a far cry from my beginnings as a tax lawyer in big NYC firms - and so much more satisfying.

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

   - My non-work time centers around yoga with other workouts tossed in, reading mysteries and books my book club pushes me to read, watching British and international mysteries and comedies and reconfiguring my newly empty home to make it mine, all mine.

3. Why did you join WEPC?

   - I joined the WEPC because I am firmly committed to women as professionals, building my friendships and developing women acquaintances with great expertise. As I move along in this world, I realize that my core group of women friends are who I fall back on, ask for nonjudgmental advice, get a quick, spot-on brush up and education on various topics and enjoy being with.

4. Tell us something unique about yourself.

   - I suppose it is still unique that I took 20 years off from the practice of law while I raised my four sons. A single mom with a set of identical twins and one son with mental illness – plus all the ordinary challenges of parenting. As full time jobs go, it was a whopper. I find practicing law much easier. Now that my son with significant issues has moved out, I find myself wondering what it will be like to not take care of others for the first time in 29 years. My goal is to invest in my life and create what I want. That may take a while to figure out!

5. What is your favorite food?

   - I confess that I am a practical vegetarian. It's easy, cheap, and no suffering is involved, except for those who have to eat my creations. I aim for easy fare, cook once a week, eat a lot of pasta and generally quake when called upon to feed others. Dinner parties at my home have become pot lucks.

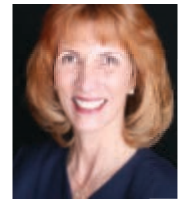
Quote of the Quarter

"Strive not to be a success, but rather to be of value."

~ Albert Einstein

NAEPC Update

By Maggie Mitchell, JD, CLU® ChFC® AEP® Vice President Advanced Marketing, Voya Financial



The NAEPC 51st Annual Conference is November 5th – 7th, 2014 in San Antonio, TX

This year's conference theme is "The Multi–Disciplinary Approach to Estate Planning." Multi–disciplinary teaming is challenging -- it requires a common vision and shared values. In addition, there are issues with respect to team dynamics, communication and designating roles and responsibilities on the team. Our conference speakers will weave into their presentations how to build a high performing, multi–disciplinary team of designated professionals, who collaborate with one another to achieve the ultimate purpose that wealth was designed to accomplish for the wealth holder, his or her family, and the institutions and causes they care most about.

Consider forming your own elite professional network and travelling to the conference together! You will hear from the following exceptional speakers:

Thursday, November 6, 2014

- Robert S. Keebler, CPA, MST, AEP® · *15 Best Planning Ideas for 2014 and Beyond*
- Todd A. Fithian · *The True Frontier of Estate Planning: Effective Collaboration*
- Bernard A. Krooks, JD, CPA, LL.M., CELA, AEP® · *Planning for an Aging Population: Your Clients, Your Parents, and Someday You!*
- Repeated Breakout Sessions
    - Susan T. Bart, JD · Decanting: Refining a Vintage Trust
    - Elizabeth L. Morgan, JD · Life Insurance, Annuities, and Captive Insurance as Tools for Domestic and International Estate & Tax Planning
    - Thomas Rogerson · Family Communication, Values, Mission, Philanthropy - How Do You Help a Client Get Started?
- Samuel A. Donaldson, JD, LL.M., AEP® · Hot Income Tax Tips for Estate Planners

Friday, November 7, 2014

- Jeffrey N. Pennell, JD · Annual Update
- Lee J. Slavutin, MD, CLU®, AEP® · Tax Traps Involving Life Insurance
- Jerome M. Hesch, JD, AEP® · Reality of Sale: Dealing with the 10% Myth for Seeding Installment Note Sales to IDGTs and BDITs
- Jonathan G. Blattmachr, Esq., AEP® · Supercharged Shelter Credit Trust vs. Portability: It's Not that Complicated to Choose the Best
- S. Stacy Eastland, JD, AEP® · Some of the Best Charitable Planning and Estate Planning Ideas We See Out There in the New 2014 Tax Environment©
- Stanley M. Johanson, JD, LL.M., AEP® · Recent Developments Affecting the Estate Planning Practice

Registration is now open; you can download and view the brochure here.

Questions? Please send me an email at Maggie.Mitchell@voya.com or give me a call at 303-886-3984.

Programs and Community Events

July Summer Picnic:

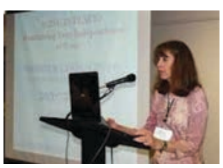
WEPC celebrated the Summer with food, fun, and networking at Marg's Taco Bistro. Thank you to Holly Sutton for organizing the event!

August Meeting:

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

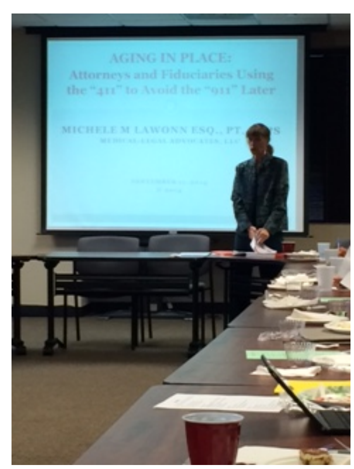

September Meeting:

Michelle Lawonn, Principal of Medical-Legal Advocates L.L.C, educated us on "*Aging in Place.*" She shared her firms' multi-faceted approach for aging adults and their caretakers to facilitate the maintenance of aging adults' quality of life through the use of legal planning, rehabilitation, safe housing options, medical management, and end of life advocacy.



Thank you to all of our speakers!





Programs and Community Events Continued

DON'T MISS THESE UPCOMING PROGRAMS!

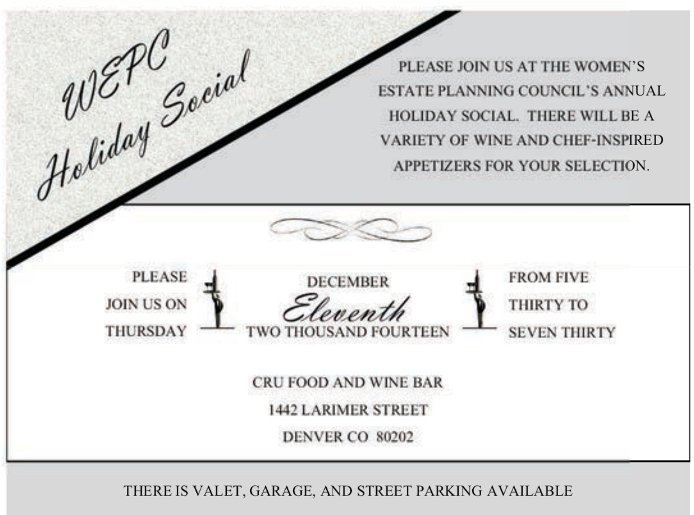
October Meeting: October 9, 2014

Ellen Trachman, Attorney and Founder of the Trachman Law Center, will be presenting on "*Probate and Estate Planning Issues Related to Assisted Reproductive Technology*." Her firm is a legal service provider specializing in family formation law.

November Meeting: November 13, 2014

Sarah Harrison, Senior Philanthropic Planner at the Denver Foundation, will be presenting on the topic of "*Intergenerational Charitable Giving*." Sarah will explore how charitable planning can help strengthen and enhance intergenerational client relationships.

December Annual Holiday Party: December 11, 2014



January Meeting: January 8, 2015

Fran Coet, Founder of Coet & Coet CPA's, will provide the "*Annual Tax Update*." Fran has 30 years of experience in accounting, tax preparation, and tax planning for individuals, corporations, partnerships, and fiduciaries.

WEPC Sponsorship

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.

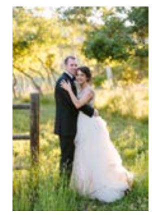
Good News from Our Members!

Celebrations

Laurie A. Hunter, Partner at Wade Ash Woods Hill & Farley, is the 2014 recipient of the R. Sterling Ambler Award for her exceptionally outstanding contributions to the trust and estate practice. Laurie has worked on legislation and Uniform Laws, testified before the Colorado legislature, chaired multiple committees for the Colorado Bar Association, and is the recognized authority on the elective share statute. Congratulations, Laurie!

Melissa Dyer, CFP, MBA, Raymond James, was selected as a 2014 Denver Five Star Wealth Manager, as seen in Colorado's 5280 and COBIZ Magazines.

Constance D. Smith, Director at Fairfield and Woods, P.C., welcomed her daughter home after being deployed in the Middle East! Connie has also been named the 2014 Barrister's Best Trust and Estate Lawyer. Congratulations, Connie!



Hayley Meyer (now Hayley Lambourn!), Attorney at Steenrod, Schwartz & McMinimee, was married on June 28, 2014, to her husband, Robin, at their family ranch in Telluride, Colorado. Congratulations, Hayley!

Lisa Hardin, Attorney at Law Office of Lisa Hardin, LLC and Of Counsel at Louis J. Davis, P.C., is expecting a baby girl in January 2015. Congratulations, Lisa!

Ellen Trachman, Attorney and Founder of the Trachman Law Center, welcomed her third child, a baby boy, on July 23, 2014. Congratulations, Ellen!

WEPC participated in the September 2014 Alzheimer's Walk and exceeded our fundraising goal by raising $1,600.00. Thank you for supporting a wonderful program!

Members Speaking Out

Constance D. Smith, Director at Fairfield and Woods, P.C. presented at the Colorado Planned Giving Roundtable on September 19th on "*Nothing is Simple about Early Termination of Charitable Trusts*."

Laurie Hunter, Partner at Wade Ash Woods Hill & Farley P.C., will be presenting at the November 7th "*Trust and Estate Fall Update: The Name of the Game is Change*."

Arlene S. Barringer, Attorney at Glatstein & O'Brien, LLP, co-presented with Dr. Kathryn Kaye, Psy.D, on the topic of "*Recognizing Vulnerability to Undue Influence in Legal and Financial Planning*" at the Second Annual Conference of Certified Senior Advisors in August.

On the Move

After a well-deserved vacation in Cabo, Vickie Wilson joined the Community First Foundation as Vice President of Development. Congratulations, Vickie!

Kirsten Waldrip has joined the College For Financial Planning as an Associate Professor of Estate Planning and Taxation. Congratulations, Kirsten!

Lisa Perry, Shareholder at Welborn Sullivan Meck & Tooley, PC, is relocating to Salt Lake City, Utah to manage a new office for her firm. We will miss you, Lisa!

Welcome New Members!

Ann Broderick, CPA at Bauerle & Company

Angelica McGill, CPA at Bauerle & Company

Hartman Axley, CLU, ChFC, JD, MSFS, RHU, AEP

Chris Bauch, CFP

Ellen Trachman, Attorney at Trachman Law Center L.L.C.

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.

WEPC Board Members 2014-2015

President: Barbara Tocker Ross
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Treasurer: Beth Staudenmaier
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Lisa Hardin
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