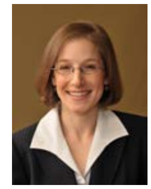
Women's Estate Planning Council Update

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

President's Message

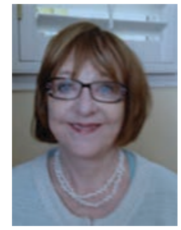
Barbara Tocker Ross, Esq., Susan R. Harris & Associates, LLC



This time of year we are surrounded by messages about giving and we are asked to give by many worthy organizations. As Sarah Harrison and Christiano Sosa from the Denver Foundation and William Schmidt, Esq. emphasized during their excellent presentation at our November meeting, charitable giving has a tremendous impact on our local communities and as advisors we can play an important role in this realm. We give back to our community in different ways – we volunteer our time and make monetary donations to charitable organizations that are important to us, we assist our clients in making donations to charities of their choosing both during life and at death, we help younger professionals who are getting started in their careers; and we support our family, friends, neighbors and colleagues in countless ways. In 2015, please consider getting more involved in the WEPC by giving your time and talent to help our organization continue to grow and flourish. You can volunteer for one of our committees (programs, PR, membership or hospitality), help with our super quarterly newsletter or help to plan events. If you are interested in getting more involved or have questions, please contact one of the WEPC Board Members – we'd be happy to answer any questions you have!

I wish you and your families a season filled with warm moments and cherished memories, and a very Happy New Year! See you in 2015!

Spotlight on Treasurer



Beth Staudenmaier, CPA, Staudenmaier & Co., P.C.

1. What is your favorite thing about the WEPC?

   - There are so many things to love about WEPC. The speakers are well prepared with super handouts and reference materials. The topics are always relevant and help me stay current on all the new developments. The food is also great and gives me a night off from cooking. But my very favorite thing about WEPC has to be the wonderful professionals I have met over the years through this organization. The members are always quick to answer questions or offer just the right answer for a client.

2. Tell us about your job.

   - I am a CPA who specializes in taxation. My firm helps both individuals and small businesses with all their tax needs. We specialize in estate and trust taxation as well so that brings even more variety to our practice. Of course as professionals we study hard to keep up with all the new developments. More importantly though, we want to know each clients' goals and how we can best help them to achieve these goals. We like to work as a team with our clients' advisors and love the opportunity to view issues from all different perspectives.

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

   - My one piece of advice for any professional starting a career is network, network, network. If you actively involve yourself with professional and community groups you will always be connected with good people who can grow with you and your clients as the years go by. And don't worry about the mistakes that inevitably occur. We all learn as we go.

4. Tell us about your favorite holiday tradition.

   - I used to love decorating my home and could not stop myself from pulling out every single item even vaguely related to the holidays. This year our children are away so it has given me time to see the smiles on peoples' faces and feel the joy of celebration in the air. I also want to develop a new tradition of taking time to count my blessings (at least once a year).

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 payable prior to or at the meeting you will be attending
- Dinner is provided
- ***We are delighted to have a beautiful meeting location:***

The Denver Foundation
55 Madison Street, Denver, CO
7th Floor Conference Room

Spotlight on WEPC Member

Debbie Reinberg, NCG – Geriatric Care Manager, Guardian and Elder Mediator at ELDEResources and ELDEResolutions

1. What is your favorite thing about WEPC?

   - My two favorite things about WEPC are the fabulous members and the great educational presentations! Perhaps a third favorite would be the wine!

2. Tell us about your job.

   - My organization, **ELDEResources,** provides geriatric care management services and we also take Guardianships. As geriatric care managers, we perform comprehensive assessments to evaluate each situation, and document concerns and recommendations in a detailed care plan. We are often hired to implement recommended services and to monitor care. Our knowledge of the eldercare maze and our ability to connect older adults and disabled individuals with appropriate services helps us to be true advocates for those in need. Especially valuable to families that are out of town, out of touch and/or too busy to navigate the system, we are often called "surrogate sisters." We are consultants and work in tandem with decision-makers and also help to balance family dynamics concerns by sharing information with all family members and listening to each person, as well. As guardians, we are the court-appointed decision-makers for individuals deemed incapacitated. As third-party fiduciaries, we are often appointed when there is no family member or friend available, willing or appropriate to act as decision-maker. Or, we often step in when family members lack trust and/or have an inability to work productively together.

     I am also a co-partner with John Rymers in **ELDEResolutions,** a conflict resolution organization focused on issues regarding older adults. We provide formal mediation (or less formal "facilitative" services.) As impartial third parties, we provide a process whereby family members (and others) can address their struggles when they have been unsuccessful resolving conflicts independently. Some of the issues that we handle include conflicts over financial or medical decision-making, caregiving duties, residency decisions, access to the older adult, end-of-life issues, and property dissolution. As non-attorney mediators, we focus on family dynamics that often drive legal and financial decisions. Ideally, we help families repair relationships so that the conflicts do not affect them and their descendants for years to come.

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

   - Knowledge is imperative, but relationships with colleagues are vital. There is so much to learn from each other! And, if you are looking for referrals – think about where they might come from.

4. Tell us something unique about yourself.

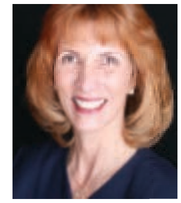
   - It is not so unique to be dealing with an aging parent. Given my line of work, it feels rather unique that my three sisters and I all seem to get along and actually be energized by the work we need to do on my father's behalf! We even bestow upon each other the monikers of SOD (sister of the day), SOW (sister of the week) or even SOY (sister of the year) when any of us go beyond expected duty.

5. What is your favorite holiday tradition?

   - On Christmas, I typically go to the movies and eat Chinese food, as that is not a holiday I celebrate. I am looking into a Mitzvah ("good deeds") project to do on Christmas Day.

NAEPC Update

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



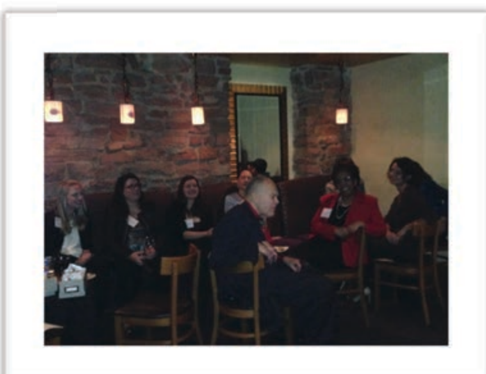
Did you know that as a member of the Women's Estate Planning Council, you have access to several exclusive NAEPC benefits? One of my favorites is the Monthly Technical Newsletter provided by Leimberg Information Services. So far this year, this monthly newsletter service has included such diverse topics as:

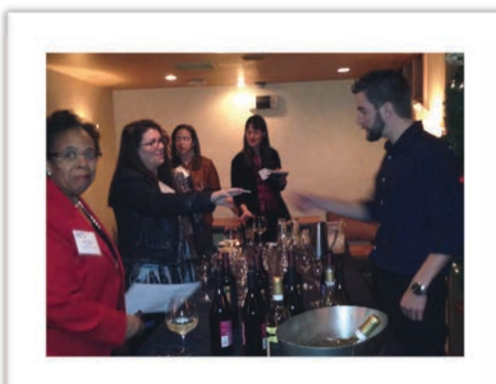
- 2014 Year-end Planning Guide
- New Portability Opportunities
- Report on Status of Same Sex Marriage in the United States
- Tools & Techniques of Estate Planning for Modern Families
- A New Era in Estate and Succession Planning
- Revenue Procedure 2014-18: Extension of Time for Portability Election

You can find these free newsletters and more by going to: http://www.naepc.org/events/newsletter

If you practice in the area of nonprofits and charitable giving, you will want to take a look at The 2013 Stelter Insight Report: Metrics That Matter – Links Between Advisors, Donors & Nonprofits. This extensive study focuses on the behaviors, attitudes and characteristics of professional advisors who interact with the public and nonprofits on the topics of estate planning and planned giving. In it several opportunities are identified, including a better understanding of how nonprofits and advisors interact when it comes to charitable decisions, and opportunities for greater synergy between advisors and nonprofits to overcome barriers to charitable giving. You can download a copy of this report at: http://www.naepc.org/ under the heading: New On This Site.

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





Quote of the Quarter

"Nothing will work unless you do."

~ Maya Angelou

Programs and Community Events

October Meeting:

Ellen Trachman, Attorney and Founder of the Trachman Law Center, gave a fascinating presentation on "*Probate and Estate Planning Issues Related to Assisted Reproductive Technology*."

November Meeting:

Sarah Harrison, Senior Philanthropic Planner and Christiano Sosa, Director of Capacity Building of the Denver Foundation, and Attorney William Schmidt, Jr. of First Western Trust enlightened us with their presentation on "*Intergenerational Charitable Giving*." Sarah, Christiano, and William discussed how charitable planning can help strengthen and enhance intergenerational client relationships

Pictured left to right: Ms. Harrison, Mr. Sosa, and Mr. Schmidt

December Meeting - Annual Holiday Social:

WEPC celebrated the holidays with great company and delicious appetizers at Cru Food and Wine Bar. Thank you to Holly Sutton, Hospitality Committee co-chair for planning another fun and successful event, and to Hart Axley for leading us in a few holiday songs and helping us get in the holiday spirit!

Thank you to all of our speakers!

DON'T MISS THESE UPCOMING PROGRAMS!

January Meeting: January 8, 2015

Fran Coet, Founder of Coet & Coet CPAs, 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.

February Meeting: February 12, 2015

Ayo Labode, Attorney at The Law Office of Ayo Labode, LLC, will present "Assisted Living and Nursing Home Issues: Advising and Advocating for your Clients." Ayo will untangle the various and often confusing levels of care that are available to meet the needs of our aging community including: assisted living residents, memory care units, green house concepts, skilled nursing facilities, and personal care and boarding homes. She will discuss admissions agreements, nursing home and assisted living nursing evictions, the regulatory environment, and will provide effective advocacy tips for you and your clients.

March Meeting: March 12, 2015

Coming soon!

WEPC Sponsorship

Nora Roth and Holly Sutton of Colorado State Bank and Trust are sponsoring January's meeting. More information about Colorado State Bank and Trust is available at https://www.csbt.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 Lisa Hardin, PR Committee co-chair at lhardin@lisahardinlaw.com.

Good News from Our Members!

Celebrations

Lisa Hardin, Attorney at Law Office of Lisa Hardin, LLC and Of Counsel at Louis J. Davis, P.C., welcomed her first baby girl, Addison Deborah Hardin, on December 24, 2014. Congratulations, Lisa!

Erica Johnson, Attorney at Ambler & Keenan, LLC, married her partner, Kari, of 17 years on October 1, 2014, in California. Congratulations, Erica!

Deborah O'Neil, J.D., LL.M., CFP(r), CLU, Vice President at Assured Equity Management Corporation, received her LL.M. in Taxation from the University of Denver. Congratulations, Deborah!

Laurie Hunter, Attorney at Wade, Ash, Woods, Hill & Farley, P.C., was recognized as a 2015 Top Lawyer for Trusts and Estate in 5280 Magazine. Congratulations, Laurie!

Members Speaking Out

Barb Cashman, Attorney and Mediator at Law Office of Barbara Cashman, LLC, is a panelist for the session "Practical and Ethical Issues in Succession Planning" at the American Bankruptcy Institute's 20th Annual Rocky Mountain Bankruptcy Conference in Denver on January 23, 2015. Barb also presented a program as part of the Small Firms, Big Success series entitled "First Thing We Do, Let's Kill All the Solo/Small Firm Lawyers: Envisioning a Future We Can Predict by Inventing It Ourselves" on October 13, 2014, and she presented "Elder Law and Family Dynamics: Ethically Managing the Attorney-Client Relationship" to the Solo/Small Firm networking group in Colorado Springs on November 5, 2014.

Kirsten Waldrip, Associate Professor of Estate Planning and Taxation at the College for Financial Planning, is presenting "Financial Planning for Same-Sex Couples Post-Windsor" on February 2, 2015, in Richmond, Virginia.

Welcome New Members!

Vera Divenyi, Wealth Planner at First Western Trust

Kellie Adam, Professional Fiduciary at CS AdvoCare, Inc.

Maura Ridge, Senior Philanthropic Planner and Director at The Denver Foundation

Stacey Stambaugh, Realtor at Madison and Company Properties

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!

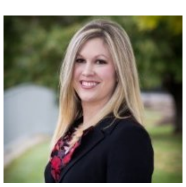
   ***Has your contact information changed? Please review your listing under "Our Members" on the website and submit an update form if any of your contact information has changed.**

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.



Newsletter Editor: Kirsten Waldrip

If you are interested in working on the newsletter, please contact Kirsten or a board member.

WEPC Board Members 2014-2015

President: Barbara Tocker Ross
Barbara@srhassoc.com

Vice President: Arlene Barringer
Arlene@denverprobatelaw.com

Past President: Kristin Piñeiro
kpineiro@sussexfirm.com

Secretary: Laurie A. Hunter
lhunter@wadeash.com

Treasurer: Beth Staudenmaier
bstaud@shtax.net

Membership Co-Chairs:
Melissa Dyer
Melissa.dyer@raymondjames.com

Kim Raemdonck
Kim@wiegandattorneys.com

Programs Co-Chairs:
Julie Fletcher
Julie@shwj.com

Ayo Labode
Ayo@labodelaw.com

Hospitality Co-Chairs:
Hayley Lambourn
Hlambourn@steenrodlaw.com

Holly Sutton
hsutton@csbt.com

Public Relations Co-Chairs:
Kirsten Waldrip
Kjacobs04@gmail.com

Lisa Hardin
lhardin@lisahardinlaw.com

NAEPC Liaison: Maggie Mitchell
Maggie.mitchell@voya.com

Committee Members and Volunteers:

Programs: Thiensa Nguyen
Thiensa.nguyen@tfaconnect.com