

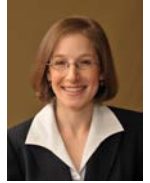


Women's Estate Planning Council Update

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



20 Years Strong. This year marks the WEPC's 20th anniversary and we proudly celebrate our tremendous growth from a small group of women in the financial service, accounting and legal professions in 1995 to an organization of 100 women in 2015. Much has changed in 20 years - we became a Colorado nonprofit organization, we joined the National Association of Estate Planners and Councils ("NAEPC"), and we have been holding our monthly meetings in the beautiful Community Room provided by the Denver Foundation. As we have grown and changed, we continue to be guided by the intention of our roots: women network differently. Two years ago, when our past president Connie Smith attended the fall NAEPC conference, she learned that we were the only women's estate planning council in the country. As far as I know we still are. In addition to this unique status, we are proud to present timely, substantive and entertaining programming, and to foster a space for meaningful interaction among women professionals.

One of the benefits of WEPC membership is our council's membership in the NAEPC. WEPC members have access to incredible resources through the NAEPC, including free access to the NAEPC Journal of Tax & Estate Planning and technical newsletters and reduced pricing on webinars taught by nationally acclaimed speakers. You can find out more about these benefits at www.naepc.org or contact our NAEPC liaison, Maggie Mitchell at maggie.mitchell@voya.com.

Another membership benefit is the opportunity to sponsor one of our monthly meetings and to speak at the beginning of a meeting about yourself and the services and expertise you can provide. If you are interested in sponsorship, there is more information on our website, or you can contact our PR Committee Co-Chair, Lisa Hardin at lhardin@lisahardinlaw.com. Let's continue to grow our membership and our organization. Please consider getting more involved in the WEPC by volunteering for a committee, or serving as a co-chair of one of our committees. We will be holding elections for our new Board of Directors in late April/early May. If you want to get more involved, please contact any of our current Board members. You can find out more information about our Board and its committees in the WEPC Membership Handbook at <http://wepc.net/WEPC%20Denver%20Handbook%20May14.pdf>.

Happy 20th Anniversary to the WEPC and Happy Spring!

Spotlight on Hospitality Co-Chair

Hayley Lambourn, Attorney at Steenrod, Schwartz & McMinimee



1. Tell us about your role on the WEPC Board.
 - I am currently serving as one of the Hospitality Co-Chairs. We are responsible for arranging for all of the refreshments served at each meeting and organizing any special events. This position has been a great way to be involved with the WEPC Board, and I would recommend it to anyone who is interested in getting more involved in the WEPC.
2. Tell us about your favorite live music experience.
 - It's difficult to pick one live music experience as my favorite. Two semi-recent concerts that I loved were Reba McEntire and The Flaming Lips. I saw Reba McEntire at Frontier Days in Wyoming, and she was great. She was a charming performer, who sounds just as good live as she does on the radio. It was a bonus that the concert was outside. More recently, I saw The Flaming Lips at the Ogden Theater, which is one of the favorite music venues in Denver. This show, although not on New Year's Eve, was considered one of their New Year's Eve shows. They shot confetti canons during the entire show, and the lead singer walked out on to the crowd in a giant bubble.
3. Tell us about your job.
 - I am an attorney with Steenrod, Schwartz & McMinimee, LLP. My practice focuses on trust and estate administration, guardianships and conservatorships, and estate planning. I work on a wide array of legal issues that arise during administration. I enjoy working directly with my clients and their families during some of the most difficult times in their lives, and I strive to resolve their issues efficiently.
4. Where are you originally from, and if not from Denver, why did you move here?
 - I am originally from Oklahoma. I moved to Denver during the summer after my 2L year to work with the Denver City Attorney's Office and later for the Office of Legal Counsel to Governor Ritter. Both legal experiences were very fulfilling, and I took advantage of all that Colorado offers during the summer. Needless to say, I fell in love with the state, and now I could not see myself living anywhere else.

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
See WEPC website for directions and parking

NAEPC Update

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



We all know that estate planning is an increasingly complex area of practice that requires specialized skill and education. Many believe that specialization is the future of practicing law and, as specialization increases, it will provide many benefits to both lawyers and the public. Recognizing that reality, the National Association of Estate Planners & Councils has created an Estate Law Specialist Program.

The Estate Law Specialist Board, Inc., is an attorney-run subsidiary of the National Association of Estate Planners & Councils, and is the only ABA-accredited program for certification of an attorney as an *Estate Planning Law Specialist (EPLS)*.

To obtain board-certified status, an attorney must meet the following requirements:

- ✓ Five or more years practicing as an estate planning attorney during which at least 1/3 of the attorney's practice is devoted to estate planning
- ✓ 12 or more hours of continuing legal education in estate planning topics per year for the three years preceding application
- ✓ Verification of professional liability insurance coverage
- ✓ Recommendation from at least five colleagues who are not with the same firm as the applicant
- ✓ Passing a comprehensive exam designed for estate planning practitioners

Attorneys who become Board-certified under this program demonstrate a high level of professionalism and commitment to the concept of specialization. This program is currently the only program, other than certain state bar association programs which are only for residents of their particular states, accredited by the American Bar Association to Board-certify attorneys as Estate Planning Law Specialists.

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



Quote of the Quarter

“When we do the best we can, we never know what miracle is wrought in our life, or in the life of another.”

~Helen Keller

Programs and Community Events

January Meeting:

WEPC Member Fran Coet, Founder of Coet & Coet CPAs, informed us about the tax changes with her “*Annual Tax Update*.”



February Meeting:

WEPC Member and Programs Committee Co-Chair Ayo Labode, Attorney at The Law Office of Ayo Labode, LLC, presented “Assisted Living and Nursing Home Issues: Advising and Advocating for your Clients.” Ayo delighted us with an explanation of the levels of care that are available to meet the needs of our aging community including.



March Meeting:

Mark Masters, Attorney at Glatstein & O’Brien, LLP, presented “US Trust Trends: Not Your Grandfather’s Trust Anymore!” and explored the many questions presented by the new application of trust protectors, asset-protection trusts, trust decanting, and similar issues.



DON'T MISS THESE UPCOMING PROGRAMS!

April Meeting: April 9, 2015

Jamie Sarche, Director of Outreach & Prearranged Funeral Planning with Feldman Mortuary, will share with us “What we are Dying to Know.” Her mission is to dispel the myths and help take the fear out of funeral planning. Jamie will be accompanied by Erica Johnson, Attorney with Ambler & Keenan, to review the Disposition of Last Remains statute.

May Meeting: May 14, 2015

WEPC Members Megan Brand, Director of the Colorado Fund for People with Disabilities, and Lisa Eastin, Attorney at Law Offices of Buchanan & Stouffer, P.C., will co-present to bring us up-to-date on “Trust Planning for Individuals with Disabilities or on Public Benefits.”

June Meeting: June 11, 2015

Mike Shea, Attorney at Law Offices of Michael L. Shea, LLC, will present “Benefits Available to Elderly Veterans and Families” and discuss VA compensation, pension, aid & attendance, and medical benefits for veterans.

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, in the meeting Evite and in the next quarterly newsletter.
- ✓ 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 lharden@lisahardinlaw.com.

Good News from Our Members! Celebrations

Stacey Stambaugh Malcolm, Real Estate Broker, started her own full service real estate and property management brokerage firm, Savvy Realty, and was married in February. Congrats, Stacey!

Carol Warnick, Attorney at Holland & Hart, LLP, was recognized by Best Lawyers© as a 2015 Lawyer of the Year for Trusts and Estates Litigation. Congrats, Carol!

Elizabeth A. Bryant, Attorney at Elizabeth A. Bryant, P.C., was recognized by Best Lawyers© as a 2015 Best Lawyer for Trusts and Estates. Congrats, Beth!

Constance D. Smith, Attorney at Fairfield and Woods, P.C., was recognized by Best Lawyers© as a 2015 Best Lawyer for Trusts and Estates and joined the Professional Advisory Council of the Denver Foundation. Congrats, Connie!

Laurie A. Hunter, Attorney at Wade Ash Woods Hill & Farley, P.C., was recognized as a 2015 Best Lawyer for Trusts and Estates. Congrats, Laurie!

Julie Fletcher, CFP at Sharkey, Howes, and Javer, joined the Professional Advisory Council of the Denver Foundation. Congrats, Julie!

Roseanne Collison, M.A., started her own care management company, Kinsman Care Management. Congrats, Roseanne!

Holly Sutton, The Private Bank at Colorado State Bank and Trust, was promoted to Trust Officer. Congrats, Holly!

Members Speaking Out

Lisa Eastin, Attorney at Buchanan & Stouffer, P.C., works with the committee for the Jefferson County Senior Law Day, and is presenting on estate planning at the event on June 13, 2015 at Colorado Christian College. The committee is seeking exhibitors for this widely attended event. If you are interested in being an exhibitor, please contact Lisa.

Joanna C. Kitto, Attorney at Ambroziak Kitto, P.C., presented "Estate Planning for Families" at the Golden Chamber of Commerce on April 2, 2015.

Kimberly Curtis, Finance Expert, Author, Investor Advocate and President & CEO of Wealth Legacy Institute, Inc., presented at Elmira College, NY on March 12th, during Arts Alive with lecture and book signing on her newly released book, Money Secrets: Keys to Smart Investing. She also presented "Financing Your Future" on December 3rd and 4th to the U.S. Environment Protection Agency.

Sumi Lee, Trust Officer at Bank of the West, will be presenting "Dealing with 'Civilian' Trustees During Trust Administration When There is a Dispute" on April 22, 2015 at the Colorado Bar Association.

Welcome New Members!

Sheila Schmidt, MBA, Owner of Life Care Solutions

Tami Carroll, Investment Advisor Representative at CoBiz Wealth

Jennifer M. Kane, Attorney at Rumler Tarbox Lyden Law Corporation, P.C.

Sumi Lee, Trust Officer at Bank of the West

Jennifer Ramos, CSA, A Better Choice In-Home Care

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 Waldrup

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@steenrodslaw.com

Holly Sutton
hsutton@csbt.com

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

Lisa Hardin
lhartin@lisahardinlaw.com

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

Committee Members and Volunteers:

Programs: Thiensa Nguyen
Thiensa.nguyen@tfacconnect.com