



# Women's Estate Planning Council

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



## President's

## Message

**Kirsten Waldrip**

## College for Financial Planning

Welcome to the 2016-2017 year of the Women's Estate Planning Council (WEPC)! Thank you so much to Arlene Barringer for her wonderful leadership and enthusiasm as President this past year, as well as to all of our Board members for their dedication to making WEPC thrive.

The new Board is actively planning a year of fantastic programs, opportunities for our members to become more involved in WEPC, and participation in community events.

Throughout the year, we will be announcing these events and opportunities through our newsletter, LinkedIn group, and at our monthly meetings. Stay tuned!

As always, your input as a member is valued and we would love to hear from you if you have ideas or suggestions for our programs and events. Also, WEPC members are encouraged to submit educational materials for our one-hour monthly presentations. We love to learn from our own members!

I am pleased to be serving as President, and I am looking forward to a wonderful year!

COMING SOON!

Look out for our new  
WEPC Facebook Page!



WEPC invites you to join us at the annual Walk to End Alzheimer's event at Denver City Park in Denver. The event will be on Saturday, September 17, 2016. Registration is at 7 am and the walk will begin at 9:15 am. The route is two miles.

Please visit [www.alz.org](http://www.alz.org) for more details.

Join our Team! If you are interested, please

contact Kim Raemdonck at  
[kim@wiegandattorneys.com](mailto:kim@wiegandattorneys.com).

*"Take the first step to a world  
without Alzheimer's"*

**#END  
ALZHEIMERS**



## ***Farewell from WEPC's Past President***

**Arlene Barringer  
Glatstein and O'Brien, LLP**

As my term as President draws to a close, I am very grateful to each and every WEPC member for making this council unique and extraordinary. We all recognize the value of relating to each other as colleagues and friends, while also promoting and maintaining the highest professional and educational standards. Thank you for taking time from your demanding schedules to attend WEPC meetings, engage with fellow members and guests, walk and raise money for Alzheimer's Association and MS Society, share personal and professional growth, and many more things.

I wish to especially thank the 2015-2016 Board members, all extraordinary women without whom this year's events could not have come together:

- Kirsten Waldrup (Vice President): Kirsten's unwavering positive energy and attention to detail came through in everything she did. We are very fortunate to have her as our 2016-17 President.
- Hayley Lambourn (Secretary): Hayley wrote and maintained meticulous minutes, set-up our Google docs account, demonstrated Google docs to the Board, and managed WEPC's records, all while her beautiful new daughter, Harper, was born in January.
- Beth Staudenmaier (Treasurer): Beth skillfully prepared and circulated monthly and annual spreadsheets, compiled and submitted the annual budget, discussed the financials at Board meetings, and regularly checked the post office box.
- Barbara Ross (Past President): Barbara has tremendous knowledge of WEPC and is our ultimate supporter. With dedication and selflessness, Barbara frequently volunteered wherever needed.
- Ayo Labode and Gina Trevey (Co-Programming Chairs): Ayo and Gina devoted countless hours to

selecting and scheduling speakers, ensuring that the topics qualified for continuing education. They submitted endless paperwork for CE approval, coordinated the logistics of the presentations, and introduced our speakers.

- Holly Sutton and Heidi Gassman (Co-Hospitality Chairs): Holly and Heidi managed the monthly caterers, coordinated the wine, planned the popular summer and holiday socials, drafted the Member Survey, organized the philanthropy walks and always stepped-up wherever needed.
- Kim Raemdonck and Angela Herrick (Co-Membership Chairs): Kim and Angela greeted attendees at monthly meetings, organized sign-ins, collected visitor fees, prepared and managed name tags, verified credentials of applicants, and made sure members felt welcome and comfortable.
- Lisa Hardin and Kristin Dittus (Public Relations Co-Chairs): Lisa coordinated sponsorships and designed new sponsorship levels. Kristin created three informative, enlightening and eye-catching newsletters which were always spot-on with relevant events, interesting facts and creative material.

Recognition also goes to:

- Thienisa Nygen (programming committee member): For many years, Thienisa has tracked and reported our individual continuing education credits, with countless hours of behind-the-scenes work.

We also appreciate the Board Appointments:

- Melissa Dyer (Membership Ambassador): Melissa attentively served as a liaison between new members, guests, and current members.
- Maggie Mitchell (NAEPC Liaison): Maggie kept us updated with information on the benefits offered by the NAEPC.

Finally, thank you to our webmaster:

- Valerie Miller of Dolomite Designs: Valerie managed our website, evites, paypal payments and e-mails. Valerie's business provides a full range of print, web and video design services to start ups and smaller businesses, and her services are indispensable to WEPC.

WEPC is a phenomenal organization, and it has been an honor to serve as President. Thank you for being a member and contributing to its success!

## **Spotlight on WEPC's Vice President**



**Holly Sutton, JD**  
**Colorado State Bank and Trust**

### **1. What is your current position and what do you like most about it?**

I am currently a Trust Officer with Colorado State Bank and Trust, and I absolutely love it for a number of reasons. First, I feel like it's a great combination of law, business, and people. Therefore, I get to use my business background with my law degree to help people. Second, everyday is different. I could be going through a decedent's personal property, meeting a rare coin appraiser, visiting a client at their home, or working from my office all day. The diversity keeps things interesting and allows me to learn something new daily. Third, I get to work with clients on a regular basis. I talk to many of my clients weekly or monthly, and it creates a close relationship. I'm sometimes surprised with just how much clients feel comfortable sharing at times, but, to me, it's an indication of how comfortable they feel with me. That always makes me feel great about my job.

### **2. Tell us a bit more about you and your life outside the office.**

I love reading, baking, and cooking. I'll read anything and everything (think Stephen King's *It* to Victor Hugo's *Les Misérables* to a Nora Robert's novel with a half-dressed man on the cover). With baking, I have the weird habit of baking coffee cake when stressed...which leads to then eating said coffee cake when stressed. As for cooking, I love to try new recipes and feed my friends and family. On another note, I'm also in the middle of planning a wedding. My fiancé and I will be getting married September 10th in Lyons, Colorado, and there seems to be a never-ending list of things to decide. Needless to say, we are more than excited for our honeymoon to Jamaica.

### **3. What other organizations, volunteer positions or non-profits are you involved with; or what boards do you serve on?**

I am heavily involved with groups internal to my bank. First, I'm the returning Co-Chair for my bank's United Way involvement. While the position used to coordinate only the annual campaign, we've expanded it to include year-round activities, such as coordinating a dress for success seminar for youth, planning a Goodwill shopping trip to demonstrate how to buy business clothes at a discount, making peanut butter sandwiches at the bank for shelters, etc. Second, I'm the President of our bank's employee club, Club 5280. We plan monthly Lunch and Learns, our bank's annual employee party, drives, fundraisers, volunteer activities, and generally serve as a go-to for helping with employee morale.

### **4. What attracted you to WEPC and/or what are you hoping to get out of your involvement with this fabulous group?**

What attracted me to the WEPC was how inviting and friendly everyone was. I believe that I was only a couple of months into working at the bank when I came to my first meeting, and I could easily see how well everyone got along and how excited they were to see each other. I was hoping to get to know more people by joining the group, and I certainly feel that I've done that. Having said that, there are still so many people I don't know well yet. I'm always up for grabbing coffee or lunch!

### **5. What do you do as a board member?**

I served as the Hospitality Co-Chair for two years, where I helped coordinate the wine and dinner for meetings, the summer and holiday socials, and the Walk to End Alzheimer's. I have, however, just recently become Vice President of our Group. I know that I now support the President and help where I can, but I'm still learning what all of my duties are.

## **New Member Spotlights**

### **Kristi Sullivan, CFP Sullivan Financial Planning, LLC**



#### **1. What is your current position and what do you like most about it?**

I am the owner of Sullivan Financial Planning, LLC. My business provides broad financial advice without any sales of products for commissions. My clients pay me hourly or by the project for unbiased advice. I also provide hourly financial planning for other wealth managers in Denver.

#### **2. Tell us a bit more about you and your life outside the office.**

I am married and have two boys, ages 10 and 12. We try to keep the kids busy with activities like skiing, biking, scootering, reading, and sports. However, it's still a constant battle to keep them off of electronics!

#### **3. What other organizations, volunteer positions or non-profits are you involved with; or what boards do you serve on?**

I am very involved with the Alliance of Professional Women and their non-profit arm, The Alliance Foundation. We work to provide economic empowerment for women through college scholarships, Village Bank micro-credit lending, and local outreach projects. I am in my 4th year of acting as emcee at the annual fundraising luncheon on September 8th.

#### **4. Tell us about any recent speaking engagements you have, past or present, or any articles you have published recently or plan to publish in the near future.**

I regularly respond to reporter inquiries through the Financial Planning Association. My quotes have appeared in CNBC, Investment News, AARP, MSN, and Financial Adviser IQ. It's a great way to build credibility and direct traffic to your website!

#### **5. Are there any professional or personal aspirations you are working towards that you would like to share?**

For many years, I have done employee education and 30-minute one-on-one meetings on site with employers. I charge a fee for the day to the employer and do not sell my services to the employees. Past clients have included Chipotle, RE/MAX, and Array Biopharma. Current clients are the City and County of Broomfield and Colorado Public Radio. I'd like to add more employer clients to my business!



**Thank You to our sponsor**

**Lee McCue at McTeam Real Estate!**





**Sarah Ehrhardt, Esq.**  
**Michael Best & Friedrich LLP**



**1. What is your current position and what do you like most about it?**

I am a partner in the estate planning group with Michael Best & Friedrich, LLP. I have been practicing law with Michael Best since graduating from the University of Wisconsin-Madison law school in 2005. I figured out pretty quickly in law school that I wanted to practice in a field where I could work closely with clients and make an impact in their personal and business lives (my first summer in law school working in the Wisconsin prison system wasn't quite the right fit). I most enjoy my direct and continued contact with clients, whether helping through a sale or transfer of a business or working through difficult life changing experiences.

**2. Tell us a bit more about you and your life outside the office.**

I am a big sports fan, in particular hockey and football (partial to the Packers), and was happy to find my office was in close proximity to several sports stadiums. I also love to travel, some favorites being Cinque Terre in Italy and Wengen in Switzerland. And having never skied in the west before, I am enjoying learning to ski on some of the best snow (and winter ski weather) I've ever seen.

**3. Have you had any job changes recently? Please tell us about those changes.**

I lived and worked in Milwaukee, Wisconsin for Michael Best until the end of 2014, with the move to

Denver. I was the sole member of the Denver office, waiving into the Colorado bar about a year after the move. During that waiting period, I continued to travel back to Wisconsin each month and began to work with clients in our Salt Lake City office. Flash forward to today, Denver is my home base, and I love meeting and working with people here, while continuing to travel to Salt Lake and Wisconsin for meetings with clients in those locations.

**4. What other organizations, volunteer positions or non-profits are you involved with?**

One organization that I have enjoyed volunteering with is the Women & Girls Fund of a Community Foundation in Wisconsin. I currently serve on the executive committee and the grants committee for this organization. The Fund works with nonprofit agencies that promote the welfare, independence and self-sufficiency of women and girls of all ages- definitely a cause close to my heart. I look forward to continuing to serve in this organization, as well as discover new volunteer opportunities in Denver.

**5. What attracted you to WEPC and/or what are you hoping to get out of your involvement with this fabulous group?**

My first meeting as a prospective member, I was pleasantly surprised with the warm welcome and the many individuals I met. Such a great introduction. And I continued to meet several women in the community who were involved with WEPC in different capacities and all highly recommended joining. I cannot wait to continue meeting more members and building my connection to the estate planning community and my new home!

**Thank You to our sponsor**

**Colorado State Bank and Trust!**



**COLORADO STATE  
BANK AND TRUST**  
**THE PRIVATE BANK**

## Programs and Community Events

### **February 11, 2016**

Katrina Jones, Esq. Public Administrator for the 17th Judicial District, presented on the Mandatory Reporting Act.



### **March 10, 2016**



Betty Lehman, Disability Advisor, Melissa Edelman, CLU, ChSNC, and Steve Owens, Esq. discussed the importance of developing a life long care plan and other planning considerations for families that have children with special needs.

### **April 14, 2016**

Laurie A. Hunter, Esq., the author of *Gifts to Minors* and a significant contributor to the CBA Trust and Estate section, discussed an overview of making gifts to minors.



### **May 19, 2016**



Nationally renowned speaker and Heckerling Institute presenter, Martin Shenkman, CPA, JD, MBA, spoke on Financial Planning in the Estate Planning Process.

### **June 9, 2016**



Julie Fletcher, CFP® with Sharkey, Howes, & Javer, presented "Why America is Falling Behind: The Reality of Household Finances." Julie discussed the economic and behavioral reasons American balance sheets are struggling to keep pace in 2016.

### **July 14, 2016**

July brought our 21st annual fun and popular Summer Social! As always, it was a fantastic time to chat up with WEPC friends and build your network while enjoying a variety of wine, beer, appetizers, desserts, and fun! Held only once a year.

### **August 11, 2016**

Kristin Dittus, JD, LLM presented on the challenges that can arise when creating estate plans for Blended Families. Kristin also discussed a variety of situations that can come up and offered solutions to remedy some of these challenges.



**Thank you to all of our speakers!**

## **DON'T MISS THESE UPCOMING PROGRAMS!**

### **September 8, 2016**

Ellen Trachman, Esq. speaking about Assisted Reproductive Technology in Estate Planning. Come learn current law affecting ART and how it can affect your client's planning.

### **October 13, 2016\***

TBA. **\*Meeting is at MS Society offices, 900 South Broadway, Second Floor, Denver.**

### **November 10, 2016**

Marco Chayet, Megan Brand, and Pete Wall will tell us all about Unusual Beneficiary Requests and how they can be handled.

### **December Holiday Social**

Come out, relax and socialize at our annual December Holiday Social amid the year end stress. Suggestions on event centers are always welcome. Looking forward to another festive event, and hopefully some carol singing by our very own Hartman Axley!

## Good News from Our Members!

### Celebrations

Angela Harrick gave birth to Catherine Amelia Herrick on 7/1/16 at 9:02 pm. She was born 6 lbs 8.8 oz and 19.75 inches.

Gina Trevey gave birth to her baby boy, Elliot Michael Trevey on July 27, 2016.

Sara Jones recently got engaged on July 22, 2016. She is planning a June 2017 wedding.

Suzie Tiftickjian gave birth to Audrey Erika Tiftickjian on July 7, 2016, weighing 6 lbs., 1 oz. She was 5 weeks early, but is healthy and has an adoring fan club in big brothers Mark (6) and Luke (3).

Ellen Trachman gave birth to Lindy Carol Trachman, on May 30, 2016, 7 weeks early. She arrived unexpectedly in the tiny town of Thermopolis, Wyoming on the way back from a weekend trip to Yellowstone. After being airlifted to Denver and spending three weeks in the NICU, they are happy to have her home with big siblings Meira (6), Turner (4), and Zev (2).

### Members Speaking Out

Congratulations to our "MS Walk" Team, which braved the cold and snow to raise approximately \$6,000! And a special shout out to member, Debbie O'Neil who raised \$4,000!

On March 9, WEPC Board Members Arlene S. Barringer and Ayo Labode respectively presented at the CBA CLE for Guardianships and Conservatorships: Addressing the Tough Issues on the topics of Ethics: How Guardians and Litem Perform Triage and What Roles Do GALs Play in these Matters; and Mental Health Proceedings.

### WEPC Sponsors

Special thank you to our new Gold Level Sponsor, **Lee McCue**, for her contribution of \$500 to further the cause of our organization.

And our continued thanks to and appreciation for **Colorado State Bank and Trust**, a faithful Gold Level Sponsor for many years.

### WEPC Sponsorship

Please consider being a sponsor for one of our fantastic monthly WEPC meetings.

**Gold Level Sponsor:** For our \$500 Gold Level Sponsors, we offer the following benefits at one of our monthly meetings:

- ◆ 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.
- ◆ 5-10 minutes to talk about your organization at the beginning of the meeting.
- ◆ Organization's name displayed on the home page of WEPC website for a year, in the meeting Evite and in the newsletters for the year.
- ◆ 4 meeting guest passes.

**Silver Level Sponsor:** For our \$250 Silver Level Sponsors, we offer the following benefits at one of our monthly meetings:

- ◆ 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.
- ◆ Recognition in the meeting Evite, newsletter and website.
- ◆ 2 meeting guest passes.

If you are interested or would like more information, please contact Kristin Dittus, PR Committee co-chair at [Kristin@dittuslaw.com](mailto:Kristin@dittuslaw.com).

## Colorado Bar Association upcoming CLEs for Estate Planning

All lectures are held at 1900 Grant Street, Suite 300 Denver, CO unless otherwise noted.

**8th Annual Elder Law Retreat**, August 25 – 27, 2016 (THREE days). *Co-Sponsored by the Elder Law Section of the Colorado Bar Association and the Colorado Chapter of National Academy of Elder Law Attorneys.* This program will be held at the Vail Marriott Mountain Resort & Spa in Vail, CO. Attendees will learn and review both the legal and practical aspects of Elder Law. 13.00 General credits, 3.00 Ethics credits.

**No Contest Clauses – Current Perspectives on Estate Planning and Litigation**, September 6, 2016. *Co-sponsored by the CBA Trust & Estate Section.* Taking into account the public policy considerations, risk analyses, and increasingly litigious nature of estate and trust beneficiaries, estate planning attorneys and probate litigators alike can benefit from learning more about no contest clauses and how they play out under Colorado law. 1.00 General credit.

### Upcoming Community Events

The Annual Symposium for the Colorado chapter of the Financial Planning Association will take place on September 22, 2016 in Glendale. Please visit [www.COFPA.org](http://www.COFPA.org) to learn more details and register.

Senior Law Day will be held the morning of Friday, October 14, 2016 at Charles Schwab Conference Center in Lone Tree. **Please contact Arlene Barringer if you can volunteer at the ask-a-lawyer event.** She is looking for 10-12 attorneys to answer questions from attendees for about 15 minutes each over the course of a two hour period.

## Meetings

Date: Second Thursday of each month

Time: 5:30-7:15 pm

Guest Fee: \$25

Dinner is provided.

We are delighted to have a beautiful meeting location at

The Denver Foundation

55 Madison Street, Denver, CO

7th Floor Conference Room

See WEPC website for directions and parking information

### Alternative Meeting Venue (October 13, 2016)

MS Society

900 South Broadway, Suite 250

Denver, CO

Parking is diagonal from the buildings in a parking garage for \$3

### New Meeting Location

*We are considering a new location for 2017 meetings, please submit any suggestions or ideas to Kristin Dittus.*

### R.S.V.P. Policy

We MUST have R.S.V.P.s by the Monday before each meeting to order food appropriately.

Guests may R.S.V.P. and pay online at [www.wepc.net/meetings](http://www.wepc.net/meetings).

## Welcome New Members!

Sarah Ehrhardt, Attorney at Michael Best & Fredrick, LLP

Sara Evanczyk, Attorney at The Law Office of Sara A. Evanczyk, LLC

Pamela Kalinowski, Attorney at Mile High Estate Planning

Eileen Kennedy, Reverse Mortgage Specialist at Reverse Mortgage Focus

Pamela Kerr, CPA at Kerr Forensic Accounting, PC

Anda Pilmanis, Attorney at Your Castle Services, LLC

Kristin Pineiro, Attorney at The Sussex Law Group, PC

Sherene Stenger, Attorney at Stenger Law Office, LLC

Michelle St. Pierre, Attorney at Baker Hostetler LLP

Peggy Stricklin, CPA at Stricklin & Associates, PC

Kristi Sullivan, CFP at Sullivan Financial Planning, LLC

Amy Symons, Attorney at Law Office of Amy E. Symons

Rebecca Theis, Trust Officer at Guaranty Bank & Trust Co.

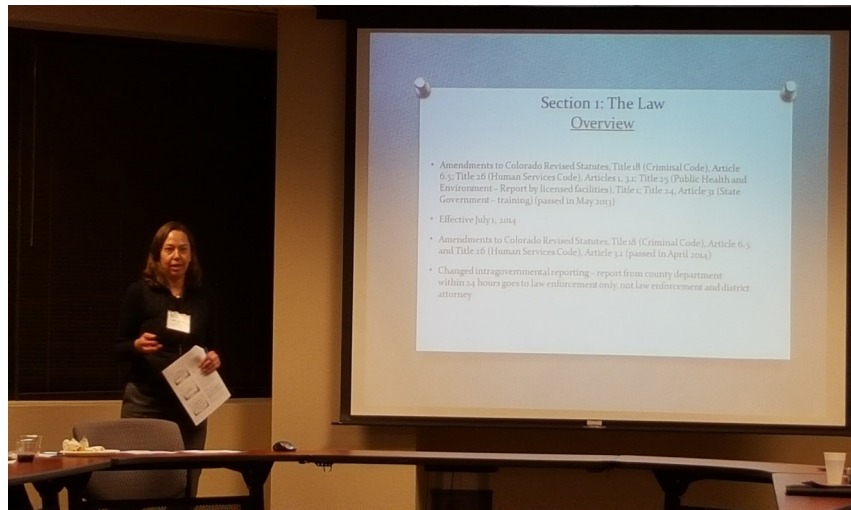
Marty Fuller, Trust Office at Colorado State Bank and Trust Co.



## WEPC Meetings



Jamie Mager, Suzie Tiftickjian and friend



Katrina Jones presenting on the 'Mandatory Reporting Act'



Lee McCue, Nora Roth, Beth Staudemier, Laurie Hunter and Laurretta Moell

## WEPC Meetings



*Thank you to everyone who attended our Summer Social held in July! Our members enjoyed some beverages while networking together into the evening. It was a great turn out and a great time!*





## WEPC Meetings

Marty and Patty Shenkman,  
Arlene Barringer, Kirsten  
Waldrip and friend



Kristin Dittus presenting  
on “Estate Planning for  
Blended Families”

Julie Fletcher presenting on  
“The Reality of Household Fi-  
nances in 2016”



## WEPC Board Members 2016-2017

**President: Kirsten Waldrip**

Kirsten@waldriplaw.com

**Vice President: Holly Sutton**

Hsutton@csbt.com

**Past President: Arlene Barringer**

Arlene@denverprobatelaw.com

**Secretary: Karen Salvatore**

Karen@shineinvestments.com

**Treasurer: Angelia McGill**

Amcgill@bcdenver.com

**Membership Co-Chairs:**

Jennifer Lyman

Jlyman@rumlerlaw.com

Angela Herrick

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**Programs Co-Chairs:**

Ellen Trachman

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Gina Trevey

Gmtrevey@amgnational.com

**Hospitality Co-Chairs:**

Kim Raemdonck

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Heidi Gassman

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**Public Relations Co-Chairs:**

Elizabeth Stewart

Estewart@stewartlawgrp.com

Kristin Dittus

Kristin@dittuslaw.com

**NAEPC Liaison: Kimberly Curtis**

Kcurtis@wealthlegacyinstitute.com

**Membership Ambassador: Debbie Reinberg**

Debbie@eldereresolutions.com

## WEPC Online

Check out the WEPC website – [www.wepc.net](http://www.wepc.net)

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 re-view your listing under “Our Members” on the website and submit an update form if any of your contact information has changed.**

Member Handbook now online. Ever wonder what certain committees or board members do? Read the descriptions in the Member Handbook!

Submit Membership Application and pay dues online!

### Quote of the Month

*"Women will have achieved true equality when men share with them the responsibility of bringing up the next generation."*

Ruth Bader Ginsberg

### Are you LinkedIn?

Join the WEPC LinkedIn Group –  
[www.linkedin.com](http://www.linkedin.com)

This is a private group, viewable only by WEPC members.

It's a great forum to connect with other WEPC members outside of the monthly meetings.

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.

Please use this site to share our collective knowledge and experience, and help the WEPC continue to grow.



Newsletter Editor: Kristin Dittus

If you are interested in contributing to the newsletter, please contact Elizabeth Stewart who is taking over the Newsletter publishing.