Third Quarter 2019

Women's Estate Planning Council

Newsletter

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

President's Message

Hayley Lambourn

Wade Ash Woods Hill & Farley, P.C.

Welcome to the 2019-2020 year of Women's Estate Planning Council! We are already well into our year of programming and have enjoyed several timely and thought-provoking programs. I would like to extend a wholehearted thank you to our immediate past president, Angela Herrick, for her leadership this past year, as well as all of our Board members for their dedication to WEPC and for their help with getting this year off to a great start.

This year we will continue to provide our members with relevant programming and opportunities to get to know each other, personally and professionally. As we get back into the groove, the Board is looking for feedback from those who drive our group's focus – our members. Thank you for taking the time to complete the membership survey. We continue to serve our membership through planning events that matter most to you.

I would also like to continue to remind everyone that the benefits of membership in WEPC extend beyond the Denver metro area. As an affiliate of the National Association of Estate Planners and Councils, we have access to national programming and other resources. I encourage you discuss these benefits with Jennifer K. Trembley, NAEPC liaison, and to visit their website at www.naepc.org to explore all that NAEPC has to offer.

As always, I value your input and am always available to discuss any suggestions you may have for our organization. I am proud to be serving as president, and I look forward to an exciting year!

REMEMBER

Holiday Social
December 12th 2019
5:30 pm
Osteria Marco
1453 Larimer St.
Denver, CO 80202

Please bring your business cards to meetings and participate in the Business Card Networking Challenge!

Events: 2019 Walk to End Alzheimer's - Denver, CO

Saturday September 14, 2019

Gina Trevey, Lauretta Moell, Kayla Nelson, Holly VandeHoef, RaQwin Young, Kelly Collins and Angela Herrick participated in the Walk to End Alzheimer's and raised $3,235.00 for this great cause.

Congratulation on blitzing our fundraising goal of $1,000.00.
A huge shout out for Lauretta Moell who single handedly raised $2,095.00. Thank you all for walking again this year!
Thank you to our members for giving so generously.

Member Spotlight: Hart Axley

CLU®, ChFC®, JD, CFP®, MSFS, RHU, AEP®

Attorney (Retired)

There is much more to Hart Axley than you may know. As our most senior and only male member of WEPC, Hart has had a very interesting, productive and varied professional - and personal - life.

Hart earned both his BA and JD degrees from the University of Wisconsin in Madison. Although now retired, Hart has been actively engaged in the profession of estate planning since passing the bar in 1956 when he joined the law firm of Holland & Hart in Denver as an estate planning specialist. A few years later, he found what was to become his life's work and passion when he accepted a position with the State Mutual Life Insurance Company (later to become the Colorado Associates of America Finance) in 1958 until 2003.

In 1962, Hart earned the CLU® designation through The American College followed by the ChFC® designation and the Master of Science in Financial Services. In 1968, Hart became acquainted with the National Association of Estate Planners & Councils (NAEPC) and there began a professional relationship which has spanned the decades.

In 1970, Hart designed the NAEPC logo which is still in use today: a key with four icons representing the professional disciplines recognized by the organization – a quill for accountants; scales of justice for attorneys; crossed keys for trust officers; and a scroll for insurance and financial planners.

Hart served as the president of the NAEPC from 1974 to 1975 and it was during his tenure that the professional designation that has become known as the Accredited Estate Planner® (AEP®) was first proposed. It experienced a rather lengthy infancy but when fully established, Hart was only the sixth professional in the country to earn the AEP® designation in 1990. In 1992, he began serving on the oversight committee for the designation program and continues as an active member today.

In the intervening years, Hart has served in many leadership roles in both professional and civic organizations locally and nationally. He has been a member of the Colorado Ethics in Business Alliance Board since 1995, serving as vice president since 2001. He is a member of the American Bar Association Real Property, Probate and Trust section and the American Society of Chartered Life Underwriter and Chartered Financial Consultant serving on the board of directors for the Rocky Mountain board of directors and its president from 1989 to 1990. He is member of the National Association of Insurance and Financial Advisors where he qualified for the Million Dollar Round Table from 1970 to 1985.

In 2004, Hart was appointed a lifetime Emeritus Director of the NAEPC and currently serves in this capacity.

The NAEPC Board of Directors created an award to honor those who have been highly active in the estate planning community and crucial to the development of the association. The award was named after the "heart" of the NAEPC, Hart Axley, and is presented yearly at the Annual NAEPC Advanced Estate Planning Strategies Conference.

The NAEPC presented Hart with the Hartman Axley Lifetime Service Award at the 41st Annual Conference in Atlanta in October, 2004. Hart received this award in recognition of his many, many years of dedicated service, both to the field of estate planning and the NAEPC. He has been active in every facet of the NAEPC over the past years. Hart was the first recipient. Since that time, fourteen other estate planning professionals, who have dedicated many years of service both to the profession and the NAEPC, have been recognized as recipients of this honor.

At the NAEPC Annual Conference in November, 2018, Hart was inducted into the NAEPC Estate Planning Hall of Fame.

Hart's other passion is skiing as evidenced by Hart being inducted into the National Ski Patrol Hall of

Fame in 2018. Hart started patrolling originally when he was a racer for the University of Wisconsin, joining the National Ski Patrol (NSP) in 1948 and leading the Badger Ski Patrol and earning National Ski Patrolman #1413.

After moving to Colorado in 1956, he patrolled at Arapahoe Basin for 29 years and patrolled for three different patrols that earned NSP National Outstanding Patrol: Denver Metropolitan (1959), Olympic (1960), and Arapahoe Basin (1977). He also helped form many patrols in Colorado, including Breckenridge, Loveland, Sunlight, and Vail.

He held the position of Front Range director from 1961-63 and Rocky Mountain Division director from 1963-69. The only six-year Director of the Rocky Mountain Division of NSPS, he instituted Senior Testing and Life Evacuation Training in Colorado, New Mexico and Wyoming, and supervised the formation of Ski Patrols at Purgatory, Sunlight and Sierra Blanca. He then served as assistant national chair of the NSP from 1969-76.

A founding member of the Colorado Search and Rescue Board, Hart also served on the Mile High American Red Cross First Aid Committee for 23 years and was also chair of the Colorado Ski Hall of Fame from 1996-99. Hart was inducted into the Colorado Ski Hall of Fame in 1993.

Hart is also a Captain in the United States Air Force, having served in the Judge Advocate General division.

Hart has served on many boards and received many additional accolades – too numerous to mention here.

Hart's other interests include badminton, being a deltiophile (a collector of picture postcards), singing and travel.

Hart married Marguerite Ann Thessin in 1954 (she passed away in 2004) and they have two children – Colleen and Timothy. Marguerite was known for her skills in the textile arts, from weaving to quilting. Her sewing expertise was legendary by virtue of the 300 bow ties she made for Hart.

Hart reached out to Erica Johnson when she was WEPC President in 2006 (I was her Vice President at that time, so I met with him as well) about having the WEPC affiliate with the NAEPC, which we decided to do. Hart started coming to meetings on and off after that, and later became a dedicated WEPC member.

Hart has been very supportive of the WEPC and continually encourages us to have more members become an AEP® and to attend the NAEPC national conference. It's through one former member's attendance at the NAEPC national conference that we discovered that we are the only women's estate planning council in the country and possibly the world – and where we found out that our dues were really low compared to other councils – especially since we provide CLE and CE credit in addition to a catered dinner.

Hart also recommended that we take advantage of the national speakers provided by the NAEPC and we have brought in a couple of NAEPC national speakers in past years as a result.

We are very happy to have Hart as a WEPC member!

WEPC thanks Nora Roth for writing this article. We also congratulate Hart for his many achievements and for his continued membership of WEPC.

Member Spotlight: Mira Fine

MT, CPA Accountant
Hein & Associates, LLP

I am a Partner with a large CPA firm with over 30 years of professional experience providing tax planning and compliance services to individuals and business organizations. I love teaching both my clients and my staff. In particular, I love the connection with various generations.

I was raised in Denver, Colorado and lived in the trailer (mobile home) parks on East Colfax. Because of this, I learned good work ethic and direction. I am driven by the ability to work with others in some way.

My outside life involves volunteer work for various organizations including the Denver Foundation Professional Advisors Board, the National Jewish Development Board, Children's Hospital Trusted Advisors Board, Historic Denver, Colorado Society of CPA's, AICPA Council and more.

I recently wrote an article for the Denver Foundation "GIVE" Magazine. I believe it can be re-published, so perhaps you might see it in a future WEPC newsletter.

My current job has allowed me the freedom to become who I am and has been a great learning experience. Every day, I recognize what it takes to do this job and I take joy in the fact that I have been allowed to do it. Sounds corny, but it is true!

I enjoy the direct connection with women in the same profession and industry that I work in. While, I have not been involved in WEPC as much as I would like, I still enjoy the connections in various ways.

SPONSORSHIP OPPORTUNITY

I'm writing today to let you know about an exciting scholarship opportunity for those who are pursuing CFP® certification through a Certificate Program at a CFP Board Registered Program.

The CFP Board's Center for Financial Planning, in conjunction with Bridgewater Advisors Inc. and the family of Milton Stern, is now accepting applications for the Milton Stern Scholars Fund scholarship for those seeking the CFP® certification.

The Milton Stern Scholars Fund is a nationwide scholarship that was created to honor Milton Stern's life and continue his legacy of making a difference in people's lives. Milton Stern was a strong proponent of the competencies and ethical standards embodied in the CERTIFIED FINANCIAL PLANNER™ certification. He was a champion of education, of diversity and of always following your dreams.

The scholarship fund is focused on providing financial assistance to:

Applicants who have earned an undergraduate degree, and wish to pursue the CERTIFIED FINANCIAL PLANNER™ certification through a Certificate Program at a CFP Board Registered Program

Applicants who demonstrate a financial need for assistance

Applicants regardless of age, race, gender, religion or sexual orientation

The scholarship is for $5,000, payable over two years.

https://centerforfinancialplanning.org/initiatives/scholarships/apply-for-the-milton-stern-scholars-fund/

to apply for the Milton Stern Scholars Fund scholarship today! Don't miss your chance—the application deadline is November 27, 2019.

Regards,

MARILYN MOHRMAN-GILLIS

EXECUTIVE DIRECTOR, CFP BOARD CENTER FOR FINANCIAL PLANNING CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

Member Spotlight:

RaQwin Young

Attorney

The Law Office of RaQwin Young, LLC

I am an estate planning attorney, operating a solo practice in Golden. I love the freedom of a solo practice, and learning how to run my own business has presented some character-building challenges that have forced me outside of my comfort zone, which is a good thing.

I am recently engaged! So, a lot of my time outside of the office has been spent on wedding plans. Otherwise, you can find me volunteering, running, paddle boarding, or hanging out with my dog, Ladybird.

I recently went from a partnership to a solo practice. This has definitely been a beneficial move professionally for both me and my former partner; however, it was not an easy move. In a lot of ways, it felt like I was breaking up with a boyfriend! The split was mutual and we are both better off, but I would be lying if I said it was easy, especially from an emotional standpoint.

I am the Programs Co-Chair for WEPC, the Chair for the Golden Young Professionals organization, the Secretary on the Board for the Golden Chamber of Commerce, and I serve on the Leadership Golden Steering Committee.

I was privileged to be raised by a smart, driven, and successful mother. Being around that kind of powerful female energy is incredibly motivating and inspiring. I have found that energy at WEPC and am so grateful to be involved with this wonderful group!

My father passed away suddenly during my second year of law school, and my family was almost the victim of some pretty terrible legal advice regarding the administration of his estate. I think that's what ignited my interest in trusts and estates; I wanted to be a reliable source of information for families.

Know yourself, and be yourself. I have found nothing but failure, anxiety, and disappointment, both professionally and personally, when I have expressed myself as being more or less than what I really am.

Member Spotlight:

Elizabeth T. Meck

M.A., J.D. VP/Senior Trust Advisor

The Northern Trust Company

What is your current position and what do you like most about it? I am a Vice President/Senior Trust Advisor for the Northern Trust Company. I love that I get to work within a multi-disciplinary team of bankers, investment managers, and account managers to ensure that everything related to trust and estate administration goes smoothly.

Tell us a bit more about you and your life outside the office. My husband and I met nearly 20 years ago on St. Patrick's Day! We are incredibly thankful to have two great kiddos – one spirited 3.5 year-old little girl and a goofy 12 month-old little boy. They keep us on our toes and busy. When not devoted to kid-only activities, we love to explore Denver restaurants, travel when we can, ski, play golf, and find new spots for fun family hikes.

What other organizations, volunteer positions or non-profits are you involved with; or what boards do you serve on? I have served on the Board of Directors for the Colorado Women's Bar Association for the last five years and am currently on the Executive Committee in the role of Historian. I also serve on the Executive Council for the Trust & Estate section of the Colorado Bar Association. I previously served on the Board for a small nonprofit organization called the Cottonwood Institute – a gem of an organization that helps to connect urban youth with experiential and outdoor education – and still participate in events when I can. I am also devoted to the Rocky Mountain Children's Health Foundation and the Center for Women's Health Research.

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. If you have published an article, would you be prepared to speak to WEPC about it or have it re-published in our Newsletter? I have had several speaking engagements and published several articles over the last few years – including a presentation on Trust Protectors to the WEPC in the spring of 2018. I am doing an update on the Trust Protector presentation for Strafford Publications on November 12, 2019. I also presented at the 2018 Colorado Estate Planning Retreat on all things related to trust and estate administration from the perspective of planning, litigating and corporate administration. I am working on a couple of articles and additional presentations to take place over the coming year on business succession planning, planning for divorce, and family governance.

Tell us about any awards or recognitions you have received lately. I have recently been asked to serve as the point-person for Northern Trust's family education and governance programming within the Rocky Mountain Region. There are a lot of exciting aspects of this programming and I am thrilled to be able to work on it so closely with colleagues of mine across the country.

Why were you drawn to work in your current line of work/ field of expertise? My background is in psychology and education. When I went to law school after a number of years in education I thought I would focus on education policy, but found that I really enjoyed my property and tax classes. As an estate planning attorney in private practice and now in trust/estate administration, I am able to draw on many aspects of my prior experiences working with families on the complex issues of wealth, succession planning, and family dynamics. I am constantly learning new things myself and get to serve as an educator for clients and colleagues.

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Please share a tip for use in their practice or daily life, or a quote or words of wisdom you have found useful/memorable.

"Listen first and then talk. This goes for working with colleagues, clients, and children"

Member Spotlight: Anda Pilmanis

Owner of Pre-Sale Property Services Inc., Agent Anda LLC., Pilmanis Law LLC.

I often wear three hats as a Project Manager, Realtor and Lawyer as the Owner of my three businesses. What I enjoy most is to using the all the different skills such as analytical/financial and design/creative skills together, to figure out what an owner of real estate should do to maximize the sale price or rental income of a property. It doesn't always mean they should sell the property or renovate it!

I advise corporations and individuals how to get the best bang for buck, including holding onto an asset as an investment, working out what changes are worth spending money on and if needed managing the project for them including design, budget and managing sub-contractors. I really enjoy the design and project management part because it is creative, (the paperwork part just comes naturally after more than 30 years as a lawyer). I keep my legal license so I can change contracts etc. and don't practice law without a license.

My Summer Project

Before and after shots from part of a summer project referred by Suzanna Wasito Tiftickjian (WEPC member).

Outside of work I love dancing. I dance with 'Virpulitis', a Latvian Folk Dance Group which rehearses weekly at the Latvian Culture Center in Lakewood. Our dance group has performed all over metro Denver, Boulder and Evergreen. Plus we have danced at the North American Latvian Song and Dance Festival performances along with some 700-1,000 other dancers in cities like Toronto, Baltimore and Milwaukee every three years. I sing soprano with the Highlands Ranch Encore Chorale and our Latvian Choir. My Latvian connection comes from my parents, who migrated to Australia from Latvia. I speak, read and write Latvian.

Several years ago, I worked as the Estates Manager and Property Manager for the Inter-Mountain Division of The Salvation Army (TSA). TSA used to sell gifts of real estate "as is". Coming from a commercial background, I changed that practice so they increased the size of each gift, be it residential or commercial, and added an extra $10,000 to $1.2 million net to the initial gift. I really loved being able to make that difference to TSA's estate gifts plus getting out of the office to work on the projects. That experience led me to do what I do today. I get a buzz from using both my design/project management skills and lawyer/real estate skills to get better results for people.

I am WEPC's Public Relations co-chair and help produce the WEPC Newsletter. I ask members for information for our Member Spotlights and source articles and other information from and about our members so we all get to know each other and what we do better. Carly and I are always interested in hearing from you and hope you will share your news with us at WEPC so please send us information about yourselves and colleagues. :)

Member Spotlight:

Chanel Podell

Relationship Manager
Peak Financial Management

I am a relationship manager for a comprehensive financial planning firm. I love knowing the ins and outs of our clients' lives and the relationships we have formed.

I am a fun loving, devoted mom, wife, Labrador Retriever lover and friend. In my free time, you may find me photographing, quilting, knitting, baking, or driving nowhere really fast!

I am proud to say I am going on my 20th year with Peak Financial. Initially. I just needed a job and a mutual friend recommended I contact my now boss. I was working at a day trading office and would have never guessed that there was more to money than the stress of losing and gaining it every minute!

The position I am in has been a great benefit to me both professionally and personally. I have a boss who has been willing to help me grow even though I had little college and no formal education. Because of her, I now have a vast knowledge of comprehensive financial planning and have earned my ParaPlanner designation. I also have great relationships with all our clients.

I was attracted to WEPC because I wanted to gain better understanding of estate planning as it relates to our clients and financial planning.

I bring experience from an assistant's role and how important our role is to make firms flourish and be successful!

The way our firm does comprehensive financial planning showed me that it really is about relationships; walking through life with clients is what we do best.

Tips for use in your daily life:

A great strategy to implement is our Steady Salary Strategy. As you receive any sort of income, deposit into a savings account then set up an automatic transfer to your checking account each month at whatever schedule to "pay" yourself. This will give you a consistent income; it will help you avoid the temptation to spend more when you have larger deposits some months and less stress when you have those not-so-good months. See the attached diagram as an example. This is especially helpful for business owners and others who have varied income. Please feel free to contact me if you have any questions about this.

Please review your listing on the WEPC website and ensure your work and contact information is up-to-date!

Advise a Membership Co-Chair if it has changed.

WEPC "Summer Social" June 13, 2019

CRU Food and Wine Bar

1 Morwenna Borden

2 Kelly Collins

3 Jenne Trembley

1 RaQwin Young

2 Kristin Dittus

3 Kelly Collins

WEPC “Summer Social”

1 Lauretta Moell

2 Jennifer Wood

1 Jamie Mager

2 Rachel Caldwell

1 Lisa Kukura

2 Colleen Sherman

3 Shelley Thompson

WEPC "Summer Social"

1 Denise Calkins-Younquist

2 Julie Fletcher McDaniel

3 Roseanne Collison

1 Angela Herrick

2 Hayley Lambourn

1 Sarah Morris

2 Holly VandeHoef

3 Gina Trevey

WEPC "Summer Social"

1 Hayley Lambourn

2 Jamie Mager

3 Julie Fletcher McDaniel

4 Rachel Caldwell

1 Daphne Jean

2 Jenny Reynolds

3 Guest

4 Lisa Kukura

5 Lisa Theard

1 Roseanne Collison

2 Angela Herrick

3 Lee McCue

1 Jenny Mattie

2 Carly Wendt

August 8th 2019 Presentation

“Charitable Planning: Top Charitable Trends and Practical Gifting Strategies: A Case Study Approach” presented by Carl A. Wayne, JD, Senior Advisor, Charitable Estate Planning at the American Heart Association

September 12, 2019 Presentation

"Utilizing Directed Trusts in Estate Planning", presented by Jeffrey B Kadavy, JD CTFA

Thank you to our Gold Sponsor

us Private Wealth Management
U.S. Bank

October 10, 2019 Presentation

“Appraisals of Fine and Decorative Art for Trusts and Estates”
presented by Jennifer M. Wood
ASA Consulting and Appraisal Services

Business Card Challenge

WEPC members have been enjoying finding out more about one another through our monthly business card challenge.

To encourage everyone participating to share one interesting fact they learned about their coffee/lunch buddy, WEPC will give a $10 Starbucks gift card to the first two members who share that fact with us at the meeting.

WEPC

Invites Members to submit articles for publication in our newsletter.

Please send articles to **Anda Pilmanis at agentanda@agentanda.com** and/or

Carly Wendt at carly.wendt@ml.com

Member News

Congratulations Angela Herrick on the birth of her son Wallace Chase Herrick on Sunday, August 11th at 9:56 am.

Weight: 7 lbs 13 oz

Length: 20.25 inches

Description: A full head of blonde hair

"Jonathan, Catherine and I love our new addition!"

Congratulations RaQuin Young

on her engagement to Michael Krizan. WEPC member RaQwin Young is happy to announce her engagement to Michael Krizan! Michael proposed to RaQwin on Lookout Mountain in Golden, where they live together with their dog, Ladybird. The couple met in Costa Rica five years ago and made their journey to Golden in 2017. The wedding is to take place at the Manor House in Littleton, Colorado, on April 10, 2020!

Member News

Holly VandeHoef

Holly VandeHoef joined Bank of America's Private Bank on 4/30 as a Trust Officer and Senior Vice President. We wish Holly every success in her new role.

Holly also became a lecturer at the University of Colorado's Leeds School of Business this semester. She is teaching Estate Planning to juniors and seniors and having lots of fun doing it!

Congratulations Elizabeth Meck

We congratulate Elizabeth on being a recipient of the Denver Foundation's 2019 Philanthropic Leadership Awards.

Congratulations Jennifer K. Trembley CFP®, ChFC®, CAP®, CRPC®, APMA®, CDFA®, BFA™

On September 1, 2019, Jenne received her Chartered Advisor in Philanthropy® designation

We are proud that Jenne Trembley has been named to two industry publications' top advisors lists for: Forbes Best-in-State Next-Generation Wealth Advisors, 2019 and Working Mother Magazine's Top Wealth Advisor Moms, 2019. The rankings recognize advisors who provide clients with a high-quality experience and lead the way in the industry while also recognizing her dedication to her family.

Forbes Best-in-State Next-Generation Wealth Advisors, 2019

The rankings are based on data provided by over 29,000 of the nation's most productive advisors. Trembley was chosen based on assets under management, industry experience, regulatory and compliance record and revenue produced over a three-year period.

Trembley is part of Ethos Financial Partners, a private wealth advisory practice of Ameriprise Financial Services, Inc. Trembley graduated from The University of Pennsylvania with a Bachelor of Arts degree.

As a financial advisor, Trembley provides financial advice that is anchored in a solid understanding of client needs and expectations and provided in one-on-one relationships with her clients. Trembley has 13 years of experience with Ameriprise Financial. For more information, please contact Renée Montalto or Jennifer Trembley at 303.252.9777 or visit the Ameriprise office at 9351 Grant Street, Suite 300 Thornton, CO 80229.

Source: Forbes, "Forbes Best-in-State Next-Generation Wealth Advisors" September 4, 2019.

Member News

Extract from Working Mother Magazine's Top Wealth Advisor Moms, 2019

THORNTON, Colorado – October 3, 2019 – Jennifer K. Trembley, CFP®, ChFC®, CAP®, CRPC®, APMA®, CDFA®, BFATM a financial advisor with Ameriprise Financial in Thornton was named to the list of "Working Mother Top Wealth Advisor Moms" published by Working Mother Magazine. The list recognizes women financial advisors with children in the home under the age of 18 who represent high levels of ethical standards, professionalism and success in the business.

The rankings are based on data provided by over 11,000 of the nation's most productive advisors. Trembley was chosen based on assets under management, industry experience, regulatory and compliance record and revenue produced over a three-year period. Trembley is part of Ethos Financial Partners, a private wealth advisory practice of Ameriprise Financial Services, Inc. Trembley graduated from The University of Pennsylvania with a Bachelor of Arts degree.

As a financial advisor, Trembley provides financial advice that is anchored in a solid understanding of client needs and expectations and provided in one-on-one relationships with her clients. Trembley has 13 years of experience with Ameriprise Financial. For more information, please contact Jennifer Trembley at 303.252.9777 or visit the Ameriprise office at 9351 Grant Street, Suite 300 Thornton, CO 80229.

About Ameriprise Financial

At Ameriprise Financial, we have been helping people feel confident about their financial future for more than 120 years. With a network of 10,000 financial advisors and extensive asset management, advisory and insurance capabilities, we have the strength and expertise to serve the full range of consumer financial needs. For more information, visit ameriprise.com or www.ameripriseadvisors.com/jennifer.k.trembley.

Visit WorkingMother.com for additional information about Working Mother.

Source: Working Mother, "Working Mother Top Wealth Advisor Moms" October 3, 2019

Forbes/SHOOK Research listings are based on data compiled by many of the nation's most productive advisors, selected by their firms, which is then submitted to and judged by SHOOK Research. Key factors and criteria include: assets under management, revenue produced over a three-year period, regulatory and compliance record, and credentials/years of professional experience. Portfolio performance is not a factor. This award is not indicative of this advisor's future performance. Neither Forbes nor SHOOK Research receives compensation in exchange for placement on the ranking.

NATIONAL ASSOCIATION OF
Estate Planners & Councils
The Association of Choice for Estate Planning Professionals

The Accredited Estate Planner (AEP) designation is available for qualified WEPC members to differentiate themselves in the field of Estate Planning. WEPC can nominate qualified members annually. Please speak to Jenne Trembley, our NAEPC liason if you interested in being nominated by WEPC.

Are you LinkedIn? **Join the WEPC LinkedIn Group – 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 referrals, or post an article of interest to the members of WEPC.
- Please use this site to share our collective knowledge and experience, and help the WEPC continue to grow.

WEPC Officers

Hayley Lambourn, Esq. – President

Wade Ash Woods Hill & Farley, P.C.
hlambourn@wadeash.com

Gina Trevey, Esq., CTFA® – Co-Chair

AMG National Trust Bank
gmtrevey@amgnational.com

Holly VandeHoef, Esq. – Secretary

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Angelia McGill, CPA® – Treasurer

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Angela Herrick, Esq. – Immediate Past President

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angela@herrick-law.com

WEPC Committees

Membership Committee

Kayla Nelson, Esq. – Co-Chair

Zumalt & Sigler, LLC
kayla@zumaltsigler.com

Anne Zellner, Esq. – Co-Chair

Ryley Carlock & Applewhite
azellner@rcalaw.com

Heather Dawson – Membership Ambassador

Heirloom Valuations and Organizing Services
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Programs Committee

RaQwin Young, Esq. – Co-Chair

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ryoung@younglawgolden.com

Denise Calkins-Youngquist – Co-Chair

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Hospitality Committee

Kelly Collins – Co-Chair

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Melanie Palmer – Co-Chair

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Public Relations Committee

Anda Pilmanis, Esq., Realtor – Co-Chair

AgentAnda LLC
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Carly Wendt – Co-Chair

Merrill Lynch
carly.wendt@ml.com

Liaison to National Association of Estate Planners & Councils (NAEPC)

Jennifer Trembley, CFP®, ChFC®, CAP®, CRPC®, APMA®, CDFA®, BFA™ – Co-Chair

Ethos Financial Partners
jennifer.k.trembley@ampf.com

WEPC Calendar

Meeting Dates for 2019

The WEPC generally meets the 2nd Thursday of every month from 5:30 to 7:15 p.m.

Upcoming meetings:

December 12, 2019
5:30 pm

Holiday Social
Osteria Marco
1453 Larimer St.
Denver, CO 80202

January 9, 2019

Annual Tax Update
Fran Coet

February 13, 2020

Networking Meeting

Instructions for Paying Dues

To pay via Credit Card:
Please visit our website at
http://wepc.net/membership.html.
- Click on the red Member Dues Renewal button (near the bottom of the page).

To pay via Check:
Please send a check made payable to "**WEPC**" to
WEPC, P.O. Box 460666, Denver, CO, 80246.
Please specify your name on the check, if the check is in your company's name.

In Person:
Please bring your check to our next meeting.
Please specify your name on the check, if the check is in your company's name.

Notes:

1. WEPC dues are due in May and are not prorated, hence the best value for your annual dues is achieved if you make payment in May.
2. Please note that if your dues are unpaid by the time of the June meeting, you will be asked to either pay your dues in full or a guest fee of $25 at the door.

WEPC Sponsorship

Please consider being a sponsor for one of our fantastic WEPC meetings. Opportunities are now available for our members.

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 Anda Pilmanis, Public Relations Committee Co-Chair at agentanda@agentanda.com and/or Carly Wendt at carly.wendt@ml.com

Please print and complete the sponsorship form directly to the Public Relations Committee Co-Chair responsible for sponsorships, as indicated on the form.

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 is 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!
4. Please notify the membership committee if your name-tag needs to be updated.