

Newsletter



WOMEN'S ESTATE PLANNING COUNCIL



Dear WEPC Members,

BOARD PRESIDENT



Mission:
To promote interaction between women estate planning professionals educationally, professionally and socially, or networking as well.

As we near the close of our 2025–2026 term, I find myself reflecting with immense gratitude on what an incredible year it has been. Serving as President of this inspiring community has been a true honor, and I am so thankful for the opportunity to have worked alongside such thoughtful, dedicated, and talented professionals.

This year marked a particularly meaningful milestone as we celebrated our 30th anniversary as an organization. From our educational programming to our social gatherings, it has been inspiring to see the continued strength, growth, and spirit of WEPC on full display. Each event was a reminder of the strong foundation built over the past three decades and the bright future that lies ahead.

As I noted in my president's letter in the summer of 2025, our members are, and always will be, the heart of this organization. Whether you attended every event or joined us when your schedule allowed, your engagement, enthusiasm, and support made this year a success. WEPC continues to thrive because of the commitment and collegiality of its members, and I am so proud of the community we continue to cultivate together.

I also want to extend my sincere thanks to our board members for their dedication, collaboration, and countless behind-the-scenes efforts. Their leadership and willingness to serve made it possible to deliver meaningful programming and memorable opportunities to connect. WEPC simply would not be what it is without their time and energy, and I highly encourage all of our members to spend some time on a committee or other board position in the future.

As I transition out of this role, I do so with confidence in the leadership ahead and excitement for what the next year will bring. I look forward to continuing to support this organization and to seeing it evolve in new and exciting ways. It has been a privilege to represent such a brilliant group of professionals. I am deeply grateful for this experience and for each of you.

Warmly,
Courtney Bine
Associate Attorney, Wade Ash LLC

In this newsletter:

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NAEPC National Events

Complimentary Webinars

Feb 18 - The Tricks & Traps of Investment Management

March 18 - Cryptocurrency

April 22- SLATs

June 17 -The New Legacy: Strategic Estate Planning with Art & Collectibles

2026 WEPC Events

Regular Meetings

Denver Foundation
1009 Grant St, Denver
5:30-7pm

March 12

May 14

August 13

September 10

November 12

Annual Socials

Galentine's - February 12

Summer - July 9

Holiday - December 10

(WEPC Socials are a great way to invite and introduce potential members to our organization!)

The Women's Estate Planning Council ("WEPC") in the Denver area was created to promote interaction between women estate planning professionals educationally, professionally, and socially.

A group of women from the financial service, accounting, and legal areas came together to form the first Women's Estate Planning Council in the Denver area. WEPC was founded in February 1995 when the bylaws were approved and the first dues were collected. From a small group of a dozen women, membership has grown to over 90 professional women and men working in the estate planning field.

WEPC has nine meetings per year, welcoming both members and non-members. An educational program is presented at each meeting to help members meet their continuing education requirements. The meetings are a fun time for networking as well.

For Membership Information, Please Contact Us

720-252-6109	INFO@WEPC.NET
www.wepc.net	P.O. Box 460666 · Denver, CO 80246

WEPC 2025-2026 Board

President

Courtney Bine

Vice President

Kaitlyn Davis

Treasurer

Angelia McGill

Secretary

Elizabeth Howard

Past President

Caroline Thompson



Committees

MEMBERSHIP Gina Trevey & Lauren da Cunha	PROGRAMS Amy Kho, Isabella Campbell & Betty Wang
PUBLIC RELATIONS Caroline Baumgart	SOCIAL Alexa Tetzlaff
MEMBERSHIP AMBASSADOR Shanna Hennig	NAEPC Jenne Trembley

2025-2026 New Members



Ally Ecklund, CPA, CFP, CPWA

Founder and Financial Advisor
Zestiny Wealth

Role: Zestiny Wealth is a fee-only wealth management firm offering financial planning, investment management and tax preparation and planning to individuals and families wanting to live their zest life!

Why joined? I'm looking for a more casual network to coordinate providers for my clients – specifically estate attorneys and other accountants

Fun Fact: I impulsively bought a camper van in the fall and am planning trips to South Dakota and Santa Fe this summer!

Alexandria “Alex” Hisle

Fiduciary Services Associate
Trustee Services Group

Role: With a history of advocating for victims of personal injury matters, Alex focuses on administering Special Needs and Settlement Protection Trusts.

Why joined? I joined WEPC to make connections with ladies in the estate planning community

Fun Fact: I went to undergrad at a labor college (Berea College) where I wove scarves on a floor loom for the student crafts department and that paid for my college tuition.



Abigail Jenkins, ABV

Founder
ProDelta

Role: ProDelta is a boutique financial consulting shop specializing in business valuations, mergers and acquisitions, and data analytics. As an Appraiser, I support clients with financial and tax reporting, litigation matters, in addition to business, estate and gift planning.

Why joined? Excited to connect with other women in the estate planning community and to find/support women service providers for my clients.

Fun Fact: I was once in a metal band. 🙌



2025-2026 New Members

Courtney Keyes

Attorney
Keyes Legal Consulting LLC

Role: Outside General Counsel for Solopreneurs and Small Businesses

Why joined? It is important that my clients' business decisions align with their tax and estate plan objectives. I joined WEPC to stay informed and to connect with other professionals so I can better serve my clients.

Fun Fact: I have three dogs and a cat



Nicole Linden

Trust Officer
Raymond James Trust, N.A.

Role: I handle a book of estate and trust settlement accounts; my primary role is to onboard new estate and trust settlements into RJT – I work directly with Financial Advisors, CPAs, Attorneys, and family members to gather documentation and asset information for Committee approval.

Why joined? I moved to Denver from St. Petersburg, FL in May 2025. I am looking to meet friends in the area!

Fun Fact: I collect Victorian mourning jewelry

Angelina Reeves

Managing Attorney
Blue Spruce Legal, LLC.

Role: I'm a solo and I started my own firm in October of 2024. Before moving to estate planning and elder law, I spent over a decade in mortgage compliance, focusing on due diligence, team and client development with technology integrations. I enjoy volunteering with Metro Volunteer Lawyers Estate Planning clinic and Littleton Public Schools.

Why joined? I joined WEPC to meet powerful, incredible ladies and to learn from them.

Fun Fact: I studied abroad in China during law school and got to attend a trial.



2025-2026 New Members



Abby Schwarz, J.D.

Attorney
Illumine Legal, LLC

Role: Illumine Legal, LLC focuses on foundational and advanced tax planning. Abby also represents clients in estate administration matters and has experience with probate litigation.

Why joined? I joined to learn more about the estate planning practice and collaborate with this group of fun, smart ladies!

Fun Fact: I am always "in" for a karaoke outing.

Other New Members

Lindsey Boutilier

Jennifer Harris

Dana Duckman

Christina Piazza

2025-2026 Events

*Celebrating our
30th Anniversary as an
Organization*

Summer Social

Thursday, July 10, 2025

Tears-McFarlane House
1290 N. Williams St.,
Denver 80218



2025-2026 Events

Winter Social

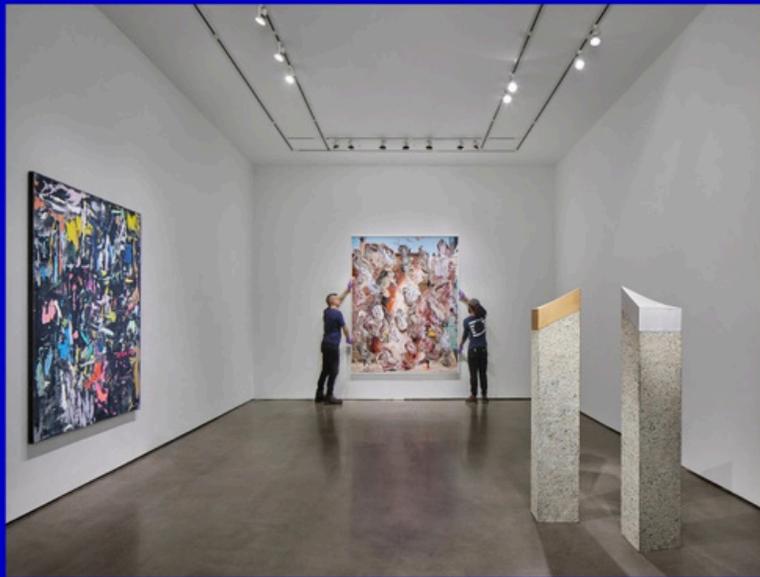
Thursday, December 11, 2025

Broderick - Denver



2025-2026 Events

Thank you to all who attended our 2026 Galentine's Gathering and an extra special thank you to each of the sponsors for this great event: Christine Whaling Art Advisory, Pamela Moore of UOVO, Carrie Fell & Company, and Kate Palmer of Morgan Stanley



YOU'RE INVITED

WOMEN'S ESTATE PLANNING COUNCIL GALENTINE'S EVENT

February 12, 2026
5:30 - 7:30 PM

Carrie Fell Gallery
2175 S Platte River Dr
Denver, CO, United States

Panel discussion
6:15 - 7:00 PM

Panelists:

Christine Whaling - Art Advisor and Appraiser, CWAA
Pamela Moore - Director of Business Development, UOVO
Carrie Fell - Artist and CEO, Carrie Fell & Company
Kate Palmer - CPWA®, Executive Director, Private Wealth Advisor

HOSTED BY



Morgan Stanley
PRIVATE WEALTH MANAGEMENT

Sponsorship Information!

Support our mission and connect with our community through one of our exciting sponsorship levels

PLATINUM SPONSOR – \$1,500+

Everything in Gold, plus:

- ✦ A custom sponsorship opportunity, designed just for you and approved by our board.
- Make a bold impact with a unique presence!

GOLD SPONSOR – \$1,000

- One 10-minute speaking spot at a meeting of your choice
- Your name on the event e-vite where you're speaking
- Distribute materials at that meeting
- 4 guest passes for the sponsorship year
- Logo/name on our website
- Recognition in our newsletter

SILVER SPONSOR – \$500

- Distribute materials at one sponsored meeting
- 2 guest passes for the sponsorship year
- Logo/name on our website
- Recognition in our newsletter

BRONZE SPONSOR – \$250

- Logo/name on our website
- Recognition in our newsletter

Sponsor Notes

- Sponsorship lasts one full year from the date of payment
- Please RSVP on behalf of your guests when attending events

For Sponsorship Inquiries, Please Contact
Caroline Baumgart: 617-529-5029

Thank You
2025-2026 Sponsors

GOLD SPONSORS

