

# Women's Estate Planning Council Denver, Colorado



## Member Involvement Handbook 2020 / 2021



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## **History**

The Women's Estate Planning Council was founded in 1995 by a group of dedicated professional women who wanted to establish a forum for women to pursue and develop their expertise in the estate planning field by creating a multi-disciplinary Council to share technical expertise, celebrate professional success and interact collaboratively and socially in the pursuit of serving our client families.

## **Mission**

To promote interaction between women estate planning professionals; educationally, professionally and socially.

## **Women's Estate Planning Council Past Presidents**

Below is a list of the Presidents who have led the Council and helped foster an environment of education, professional development and friendship. Without their leadership and the support of the many volunteers who serve on the Board and committees, WEPC would not be the recognized leader in providing professional women a multi-disciplinary forum for the development of their craft.

1995	Carol Williams Craigie
1996	Heather Rumsey
1997	Julie Gunkel
1998	Sheri DiPaglia
1999	Natasha O'Flaherty
2000	Jan Crewes-Jones
2001	Amy Locke
2002	Elaine Carleton
2003	Sharon Judd Englert
2004	Carrie Steinert
2005	Julie Gunkel
2006	Erica Johnson
2007	Nora E. Roth
2008	Kimberly L. Curtis
2009	Catherine E. Schwartz
2010	Darla L. Daniel
2011	Myra Donovan
2012	Connie Smith
2013	Kristin Piñeiro
2014	Barbara Tocker Ross
2015	Arlene Barringer
2016	Kirsten Waldrip
2017	Holly VandeHoef
2018	Angela Herrick
2019	Hayley Lambourn

## Message from the President

I am honored to serve as President of Women's Estate Planning Council (WEPC). As we enter our 25th year as an organization, I want to emphasize the mission of WEPC, which has aided in the development of our organization: "To promote interaction between women estate planning professionals; educationally, professionally and socially."

Educationally, our Board strives to provide educational programming that reaches the multi-disciplinary estate planning fields of our members. Each member has a unique perspective that allows us all to learn and grow as professionals, and we invite members to participate as monthly speakers. As a WEPC member you are not only afforded the opportunity to learn from our members, but you are also affiliated with and have access to all that the National Association of Estate Planners and Councils (NAEPC) has to offer—from educational resources programming to professional accreditation.

Professionally, we strive to network during our "new normal" as a result of COVID-19. We are exploring new ways for member so safely network, whether it is in virtual chat rooms or small in-person gatherings. Members can share job openings on our website. Meeting sponsorships are also available to our membership and allow members to teach us about their businesses. All members are encouraged to join the Board or volunteer to serve on a committee.

Socially, WEPC participates in community outreach events, such as the Walk to End Alzheimer's, that directly impact those individuals who are often in need of our expertise. WEPC celebrates our members and encourages socialization at our semiannual socials and February networking event. We also enjoy learning about our members' personal and career developments in our newsletter and encourage them to publish educational columns.

It is through these activities and the dedication of our members that WEPC's membership has grown over the years. I encourage you to read this Member Handbook and learn about the opportunities that WEPC has to offer. The organization is strong because of its members. I am thankful for each of you and your continued dedication to our great organization. I am looking forward to a wonderful year.



### **President**

Gina Trevey, Esq.  
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## Women's Estate Planning Council Officers



**Vice President**

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**Secretary**

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**Immediate Past President**

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## **General Information for All Committees**

- Volunteers are needed across all disciplines to serve on the various WEPC committees.
- Volunteers do not need prior WEPC experience in order to serve on, or chair a committee.
- Expectations of volunteers include regular attendance at WEPC monthly meetings, where volunteers are expected to serve as “ambassadors” of the WEPC, welcoming visitors and new members and helping to make introductions.
- Time commitment for volunteers will vary, depending upon the committee and the responsibilities involved. A minimum time commitment includes monthly meeting attendance and follow through on assigned committee responsibilities and duties.

## **Membership Committee**

### **Purpose**

The purpose of the Membership Committee is to increase awareness of, and involvement in, the WEPC.

- One of the goals of this committee is to improve member retention, as well as increase the number of new members. Regular contact should be made with existing members in some sort of organized “outreach” program to improve retention and attendance at meetings, and to ask for referrals of potential new members. Timely follow-up with visitors should be done to answer questions, and explain membership benefits and application process.
- The membership committee will assist the WEPC President in finding ways to generate interest in serving on committees and on the WEPC Board. This committee will also communicate with the Webmaster (currently Valerie Miller) on maintaining the membership application and to track new member interest in volunteering, and coordinate with the appropriate committee of interest.
- This committee should work closely with the Public Relations Committee to make sure that new members are welcomed in the newsletter, and to ensure that awareness about WEPC events is being publicized to prospective members.
- The Membership Committee is responsible for posting signs/directions to meeting space, organizing member and visitor sign-in, the collection of visitor fees, and providing nametags for monthly meetings. This committee is also responsible for explaining the application process to visitors and prospective members.
- Recruit monthly greeters to help introduce visitors to other members so they feel comfortable and welcome.



## **Membership Committee, cont.**

### **Expectations of Volunteers**

Volunteers will attend committee meetings and actively participate in committee activities. Volunteers are expected to be “Ambassadors.”

### **Membership Committee**



#### **Co-Chair**

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**Membership Ambassador**



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## **Programs Committee**

### **Purpose**

The purpose of the Programs Committee is to schedule programs for monthly WEPC meetings. This committee is responsible for determining appropriate topics, then identifying and scheduling competent speakers.

- This committee should solicit program feedback, as well as input for future topics of interest, from WEPC members.
- Other duties include corresponding with presenters to confirm date and time of presentation and provide directions to the meeting location, and communicating with presenter regarding AV equipment and set expectations around number of members/guests expected to be in attendance and who is responsible for making copies of handouts.
- Follow-up with a Thank You note to the presenter of the monthly program.
- This committee also corresponds with WEPC Webmaster (Currently Valerie Miller) to make sure that programs are posted on the Events Calendar on the website, reminder notices are sent out via email, and RSVP totals are shared with the presenter so the appropriate number of handouts can be provided.
- This committee coordinates with the PR/Community Outreach Committee to provide program information for the newsletter, as well as other local area publications announcing upcoming WEPC meetings (e.g. Denver Business Journal, Denver Woman Magazine, etc.).
- This committee gathers and submits requirements necessary to obtain approval for continuing education credits for WEPC members (Attorneys, Accountants, Financial Advisors, and Insurance Professionals). Documentation must be submitted no later than 60 days prior to program date in order to secure continuing education credits, and follow-up is required after the meetings.

### **Time Commitment**

The combined time commitment for the Co-Chairs is several hours per month, in addition to attendance at the monthly Board and WEPC regular meetings.

## **Programs Committee, cont.**

### **Program Committee**



#### **Co-Chair**

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## **Hospitality Committee**

### **Purpose**

The Hospitality Committee is responsible for providing refreshments at monthly WEPC meetings. Duties include, but are not limited to, the following:

- Provide beverages (wine and cups) for monthly meetings.
- Arrange for catering each month.
- Plan July summer picnic and December holiday party.

### **Expectations of Volunteers**

Volunteers are expected to attend monthly WEPC meetings, the July picnic, and the December holiday party. Volunteers are expected to arrive at monthly meetings and special events approximately 15 minutes early to help set up. Volunteers are also expected to help serve, as necessary, during meetings and to help to clean up after events.

They will be expected to communicate with the committee co-chairs to assure adequate refreshments are provided. If a volunteer is unable to attend a particular event, the volunteer is expected to notify the co-chairs.

### **Time Commitment**

Involvement in this committee is generally limited to before, during, and after events. However, involvement with this committee may also necessitate purchasing particular items in order to assure that adequate refreshments are provided for events.

## **Hospitality Committee, cont.**

### **Hospitality Committee**



**Co-Chair**

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**Co-Chair**

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## **Public Relations Committee**

### **Purpose**

The committee oversees the public relations and community outreach aspects of the Women's Estate Planning Council in order to create awareness.

Duties may include but are not limited to:

- Manage the WEPC LinkedIn Group site.
- Create and publish to our members a newsletter three times a year that promotes upcoming speakers, member news, and other estate planning information of interest.
- Organize special events to promote the WEPC and connect with the community (e.g. HomeAid Colorado, VOA, and Habitat for Humanity, etc.)
- Keep in touch with the Program Chair as to upcoming speakers, times and dates at the beginning of each month, faxes and/or emails information for the next three months programs to each contact if known.
- Promote the WEPC by issuing press releases of members' accomplishments.
- Contact different law and accounting firms to inform the women attorneys and CPA's of our organization and to notify them of the upcoming meetings.
- Maintain a current listing of phone numbers and email address of contacts for financial, accounting and legal news organizations to advertise monthly meetings.

### **Volunteers Needed**

Committee membership is open to volunteers with an interest in marketing, public relations and/or community outreach.

### **Expectations of Volunteers**

Volunteers are expected to actively participate in meetings and conference calls.

## **Public Relations Committee, cont.**

### **Time Commitment**

The committee meets primarily as needed, to evaluate existing initiatives and discuss new ideas for the upcoming year. There are additional conference calls and email discussions as needed

### **Public Relations Committee**



#### **Co-Chair**

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

### **Purpose**

The liaison provides updates on the benefits offered by the NAEPC to WEPC members, serves as the contact person for information coming from the NAEPC and discusses the renewal of the membership annually with the WEPC Board.

Responsibilities include:

- Provide a current membership list to the NAEPC.
- Provide the membership with information on the benefits offered by the NAEPC.
- Promote the Accredited Estate Planner designation available through the NAEPC as recommended by WEPC.
- Provide assistance to any member who needs help in obtaining the membership login information or any other information from NAEPC.



### **Liaison**

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## **Meeting Dates for 2020/2021 Year**

The WEPC generally meets the 2nd Thursday of every month. Following are the dates of upcoming meetings:

June 11, 2020

July 9, 2020

August 13, 2020

September 10, 2020

October 8, 2020

November 12, 2020

December 10, 2020 (Holiday Social – date may vary)

January 14, 2021

February 11, 2021

March 11, 2021

April 8, 2021

May 13, 2021

Women's Estate Planning Council

[www.wepc.net](http://www.wepc.net)

