



# Women's Estate Planning Council

WEPC Newsletter, September 2015

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



## President's Message

**Arlene S. Barringer**

**Glatstein & O'Brien, LLP**

Welcome to a new Board year of the Women's Estate Planning Council ("WEPC"). This year we salute our founders, who in 1995 created the only

estate planning council in the country formed specifically with women in mind. Our mission remains the same today: to promote interaction between women estate planning professionals educationally, professionally and socially. We promote the highest professional and educational standards, AND recognize the value of relating to each other as colleagues and friends. Thank you all for contributing to the vitality of WEPC. Now almost 100 members strong, WEPC flourishes from our collective efforts.

A special thank you to our immediate past president, Barbara Tocker Ross, for her leadership and contribution this past year. Lucky for all of us, Barbara will continue to serve as an officer of the council for an additional year, in the role of past-president.

If you are interested in becoming more involved with WEPC, there are many opportunities. We value your participation so that new ideas emerge. Here are a few suggestions:

- Volunteer to write a short substantive article for the Newsletter;
- Develop an educational and substantive one-hour program for consideration by the Programming Committee for one of our monthly meetings;
- Join the WEPC team at the Alzheimer's Walk on September 19, 2015;
- Share a professional or personal milestone by submitting it to the next WEPC Newsletter;
- Connect with colleagues through the WEPC LinkedIn Group, available only to WEPC members;

- Offer to greet members and guests at the check-in table at a monthly meeting;
- Meaningfully connect with newer members and guests;
- Explore the WEPC website, join a committee, and suggest new ideas to any officer or committee chairperson.

It is an honor and privilege to serve as President of WEPC for the 2015-2016 year. I look forward to a productive and fulfilling year!



## Past President's Message

**Barbara Tocker Ross, Esq.**

**Susan R. Harris & Associates, LLC**

It was an honor to serve as President of the WEPC and to work with an incredible team of officers, committee chairs and

volunteers. It was a fun year too! In my final President's Message, I want to recognize the outstanding contributions of our Board members, both outgoing and continuing members, and volunteers.

Julie Fletcher and Ayo Labode organized another year of excellent programs. We've seen an increase in meeting attendance in recent months, which is a testament to the quality of our programs and membership! Again this year, Thiensa Nguyen has handled the paperwork to ensure our continuing education credits are processed. As part of our community outreach, we invited Beads for Life to attend our November meeting. We learned about the great work done by this women-focused organization and had the opportunity to buy some unique holiday gifts.

Melissa Dyer and Kim Raemdonck welcomed and kept track of our new members and guests, managed our name tags (which is no small feat), and confirmed the professional certifications of our new members. We've seen our membership grow this year as well.

*(Continued on page 2)*

Hayley Lambourn, with the help of Holly Sutton, ensured that we had enough delicious food and beverages at our meetings. Holly planned our fun summer social on the patio at Marg's uptown and a festive December event at Cru Wine Bar where member Hart Axley led us in holiday songs. Holly was the WEPC's team captain for the Alzheimer's Walk in September. WEPC members and some family members participated in the walk, and we raised over \$1,600!

Kirsten Waldrip assembled and edited four excellent newsletters, sharing news and photos regarding the WEPC and our members. Lisa Hardin helped to keep us connected through our LinkedIn page and oversaw our sponsorship program.

Arlene Barringer provided support and advice wherever needed and was a true ambassador, in particular at our monthly meetings. Laurie Hunter kept meticulous minutes of our Board meetings and maintained our corporate records. Beth Staudenmaier maintained our financial records and made sure all our bills were paid. Kristin Piñeiro completed her three-year term by chairing the nominating committee and putting together a terrific slate for this year's Board of Directors.

Maggie Mitchell stepped into the role of NAEPC liaison last year and kept us updated on NAEPC happenings in the newsletter and at meetings.

Valerie Miller of Dolomite Designs, handled all web-based matters for us, including managing our website, meeting invites and WEPC e-mails, and monitoring Paypal payments.

Please join me in saying thank you to each of these women for their hard work and dedication to the WEPC. The WEPC would not be the successful and esteemed organization it is without their contributions and without all of you!

And finally a big thank you to The Denver Foundation and Maura Ridge, Senior Philanthropic Planner for TDF and WEPC member, for their continued support and allowing us to hold our monthly meetings in the Community Room. It is a joy to attend meetings in this comfortable, above ground and lovely space.

Congratulations to the new WEPC President, Arlene Barringer, and to the new Board. I am delighted to pass the gavel to Arlene and look forward to another great year for the WEPC under her leadership.

## Spotlight on Programs Committee Co-Chair

**Gina M. Trevey, JD**

**Trust Officer at AMG National Trust Bank**



1. Tells us about a job you have held or are currently at that has had a big impact on you, either personally or for your career, and why.

For a brief period of time I had my own law practice. From that experience, I came to appreciate the hard work and courage needed to run a solo practice or small business, and I am grateful for my personal and professional growth during that time.

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

I am a trust officer at AMG National Trust Bank. The best part of my position is working with clients. A big part of my day is committed to listening to my client's needs and finding solutions that meet those needs. Each client is unique, and that diversity is what keeps my job interesting and enjoyable.

3. Tell us a bit more about you and your life outside the office?

I am married. My husband, Mike, and I have a sweet but mischievous Boston Terrier named Baxter. On the weekends, you can usually find the three of us hiking or camping in the summer and snowshoeing in the winter.

4. Are there any professional aspirations you are working towards that you would like to share?

I am currently working towards earning my CTFA (Certified Trust and Financial Advisor) certification.

5. What do you do as a board member?

I am co-chair of programming. If you have any suggestions on future presentations, please contact me or Ayo Labode.



## NAEPC Update

By Maggie Mitchell, JD, CLU®  
ChFC® AEP® V.P. Advanced  
Sales, Voya Financial

Did you know that as a member of the Women's Estate Planning Council, you are also a member of the National Association of Estate Planners & Councils (NAEPC)? Joining the Women's Estate Planning Council is a terrific first step, but have you considered joining a group of professionals who recognize the need to stand out in the estate planning crowd by obtaining your AEP® designation?

What does it take to get this designation? An abbreviated list of qualifications and requirements includes:

- Credential - active license or certification as an attorney (JD), accountant (CPA), insurance professional and financial planner (CLU®, CFP®, ChFC®), or trust officer (CTFA)
- Experience - minimum of 5 years of experience in estate planning
- Education - applicants must successfully complete 2 graduate courses from The American College or similar graduate courses through an accredited university, college or school of law as part of a masters' or doctoral degree program (a minimum of 15 years of experience in estate planning exempts one from this requirement)
- Membership - applicants must be a member of an affiliated local estate planning council
- Reputation & Character - an applicant must provide 3 professional references; one of whom must share the same primary discipline and 2 others must be from 2 different disciplines
- Continuing Education - an applicant must have a minimum of 30 hours of continuing education, 15 of which must be in estate planning, every 24 months
- Ethics - applicants must sign a declaration statement to continuously abide by the NAEPC Code of Ethics
- Core Mission - applicants must acknowledge a commitment to the team concept of estate planning

Interested in learning more? Send me an email at

MaggieMitchellFinancial@outlook.com or give me a call at 303-886-3984.

## Quote of the Month

*"We can each define ambition and progress for ourselves. The goal is to work toward a world where expectations are not set by the stereotypes that hold us back, but by our personal passion, talents and interests."* **Sheryl Sandberg**

## Meetings

Date: Second Thursday of each month

Time: 5:30-7:15 pm

Guest Fee: \$25 payable prior to or at the meeting you will be attending

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

## 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](http://www.wepc.net/meetings).

Thank You to our sponsor

Colorado State Bank !



## New Member Spotlight

### Sheila Schmidt - Owner, Life Care Solutions



#### 1. Tell us about your career.

I spent 17 years working in IT, ultimately running a consulting practice for a company in San Diego and traveling all of the time. I realized that I wanted to shift my focus to working in an area that helps people and makes a difference, and I felt like I could apply my business experience to the health care arena. As a third-generation Colorado native, I wanted to re-focus my career efforts to stay closer to home and cultivate relationships in my state instead of relationships all across the country. After searching for the right business for nearly 2 years, my husband and I purchased a 20-year old company in care management. Our company provides care coordination and management for individuals and families dealing with health challenges in Denver and Colorado Springs. We primarily serve seniors, and most of our clients have some form of dementia-related disease. We also serve clients dealing with other health issues such as cancer, traumatic brain injury, or developmental disabilities. We coordinate anything and everything for our clients, including but not limited to attending medical appointments, facilitating communication between doctors, managing medication, coordinating transitions to and from home or hospital, providing 24 hour emergency response, conducting functional assessments and managing family dynamics. But what we really do is grant peace of mind to families who are overwhelmed with the challenges associated with their individual situations.

#### 2. What is your best advice for someone starting out in your career field?

Meet people where they are! My greatest pleasure is helping to ease the burdens felt by families, and assisting our clients with living the best life they can live. But it

requires meeting every single person where they are at any moment in time. Everyone is doing the best that they can in their respective situations.

#### 3. Why did you join and what do you enjoy about WEPC?

WEPC is a perfect mix of priorities that align with my passion. I believe in the power of planning to minimize financial and health care challenges and maximize quality of life, and estate planning and care management work hand in hand to create an optimal roadmap to quality of life. I also believe in the power of a strong network of talented individuals to share experience and expertise and help each other reach greater success and fulfillment, all while assisting each other to serve our clients to the highest possible degree. I love that WEPC is about women supporting women!

#### 4. What is your favorite book that you would recommend to WEPC members?

My reigning favorite book of the moment is called The Heart Math Solution (by Doc Childre and Howard Martin with Donna Beech), which is about "how 30 years of research have shown that the heart's "intelligence" affects emotions and physical health," (copied from amazon.com's own review). The HeartMath program was developed by cardiologists working with physicists and psychiatrists, so it is based on science and research, which I love. The research shows that "when heart intelligence is engaged, it can lower blood pressure, improve nervous system and hormonal balance, and facilitate brain function." (HeartMath Solution, pg. 1). I am a huge fan of non-medical interventions for everything, including stress management. It is a fascinating approach to reframing the chaos and stress involved in life today - I highly recommend it to everyone!

#### 5. What is your favorite thing to do in the Summer?

My favorite thing about summer is the availability of amazing produce. I love organic and love to cook, and having fresh options grown nearby is the best! I am always sad to see the farmers' markets end at the close of the season.

## Programs and Community Events

### April Meeting



WEPC member Jamie Sarche, Director of Outreach & Pre-arranged Funeral Planning with Feldman Mortuary, shared with us "What we are Dying to Know." Jamie's mission is to dispel the myths and help take the fear out of funeral planning. Jamie was accompanied by WEPC member Erica Johnson, Attorney with Ambler & Keenan, to review the Disposition of Last Remains statute.

### May Meeting



Megan Brand, director of the Colorado Fund for People with Disabilities, and Lisa Eastin, Attorney with Buchanan & Stouffer PC, brought us up-to-date on "Trust Planning for Individuals with Disabilities or on Public Benefits."

### June Meeting



Andy Baum, CPA/ABV/CFF and Kristine Roper, ASA of Harper Hofer & Associates brought us the latest in damages and valuation issues pertaining to estate planning. Their expertise and experience helped us to identify these issues as they arise and determine if the services of a forensic accountant can add value for our clients.

### September Meeting:



Susie Germany, of The Germany Law Firm, P.C. and Christi Romero-Roseth, of the Colorado Fund for People with Disabilities presented on the ABLA Act.

Erin Leeper from the Alzheimer's Association also gave a 5 minute presentation about the Alzheimer Walk on September 19, 2015.

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

## DON'T MISS THESE UPCOMING PROGRAMS!

### October 8, 2015 Meeting



Janine A. Guillen, JD, MBA, LLM, RN of Davis Schilken, PC, will be speaking about Medical Advocacy.

### November 12, 2015 Meeting

Details to be announced soon. A proposed topic is discussing the intersection between technology and demography, and how it is changing giving behavior.

### January 14, 2016 Meeting



Francis J. Coet of Coet2, CPAs, PC, with more than 30 years experience in tax will present the annual tax update. **Note - our normal room is unavailable and the location will be announced in the EVITE before this meeting.**

## **Colorado Bar Association upcoming CLEs for Estate Planning**

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

**Lesbian/Gay/Bisexual/Transgender (LGBT) Law Institute - Dignity to All Persons**, Sept. 24 - 25 for 10.00 general credits.

**Gifts, Donations, Memorials and Other Funds**, October 15 for 1.00 general credit.

**Gifts to Minors**, Oct. 22 for 3.00 general credits.

**Trust & Estate Fall Update 2015: Understanding Benefits**, Nov. 6 for 6.00 general and 1.00 ethics

## Good News from Our Members!

### Celebrations

Roseanne Collison, MA, NCG, Executive Director, Care Manager at Kinsman Care Management, LLC received her National Guardianship Certification in July.

Kimberly J. Raemdonck, Attorney at Wiegand Attorneys & Counselors was promoted to Senior Associate.

Lisa Hardin, who serves on the WEPC board as co-chair of the Public Relations Committee, has merged law firms with Louis J. Davis. The new firm is Davis & Hardin, PLLC, and is located at 5600 S. Quebec St., Ste. 148B, Greenwood Village, CO 80111.

### Members Speaking Out

Kristin Dittus, Attorney at The Law Office of Kristin Dittus, will be presenting "Considerations in Estate Planning for a Blended Family" at the Denver Senior Law Day on October 17, 2015.

## WEPC Sponsorship

Please consider being a sponsor for one of our fantastic monthly WEPC meetings. For a \$500 sponsorship, 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.

If you are interested or would like more information, please contact Lisa Hardin, PR Committee co-chair at [lhardin@lisahardinlaw.com](mailto:lhardin@lisahardinlaw.com).

## Welcome New Members!

Cassie Courtnage, Community Relations Manager at All of the Comfort of Home

Marianne Luu-Chen, Attorney at Donelson Barry, LLC

Jamie Mager, American Cancer Society

Alyssa Miller, JD candidate 2016, University of Denver-Sturm College of Law

Chanel Podell, Manager of Operations at United Capital

Jamie Sarche, Director Prearranged Funeral Planning at Feldman Mortuary and Generations Funeral Service

Lori Schuster, Business Development at Lifecare Innovations

Elizabeth Stewart, Attorney at The Stewart Law Group

Shelley Thompson, Attorney at Burns, Figa & Will

Teri Tone, CTFA

Jennifer Trembley, CFP®, ChFC®, CRPC®, APMA®, CDFA(TM), Ethos Financial Partners, a private wealth advisory practice of Ameriprise Financial Services, Inc.

Michelle Mieras, CTFA, JD, LLM, Trust Officer at Bank of the West

Kellie McBride, MBA, President and Case Manager at Life Circle Case Management & Guardianship Services LLC

Vicki Dansky, Attorney at Rose Community Foundation

Kelley Britt Shaw, MBA, Wealth Management Senior Trust Associate at Colorado State Bank and Trust

## Upcoming Community Events

### Third Annual Fall Symposium in Emerging Trends in Fiduciary Law and Litigation

Please join Holland & Hart, LLP on the morning of Sept. 24, 2015 for their Third Annual Fall Symposium in Emerging Trends in Fiduciary Law and Litigation for 2 general credits.

Annually, the Fiduciary Solutions Practice Group at Holland & Hart identifies relevant, developing legal issues that impact fiduciary relationships and the litigation that often accompanies conflict and disharmony. Working with the questions and conflicts arising from the transfer of wealth requires insight and vigilance. Our seasoned group of veteran problem solvers will share their experiences, perspectives, practice tips, and wisdom to arm you with the knowledge to make the process easier.

To be held at the Grand Hyatt Denver, 555 17th Street, 38th Floor, Denver, CO 80202

Questions, please contact Jennifer McCord at [jamccord@hollandhart.com](mailto:jamccord@hollandhart.com) or 303.295.8349.

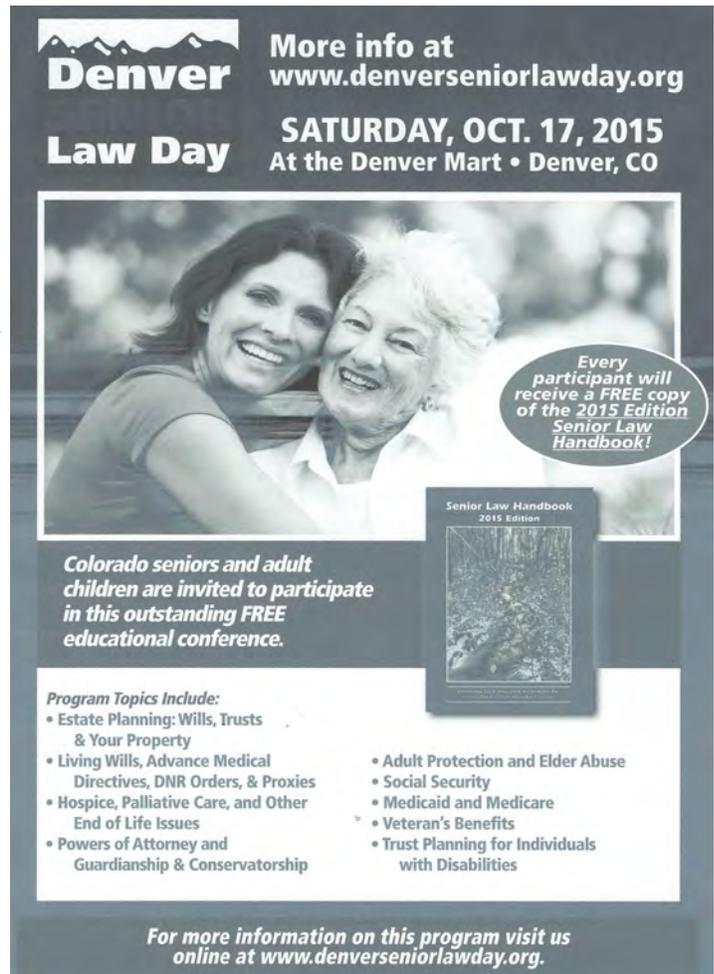
### Storming the Bench

Join the Colorado Women's Bar Association on Thursday, November 12, 2015 for a fantastic annual event: *Storming the Bench!* At this popular event, a panel of judges, members of the nominating commission and other esteemed legal professionals will provide important insight into the process of becoming a female judge in Colorado.

**When:** Thursday, November 12, 2015. Registration and Continental Breakfast begins at 8:30, program from 9-11:30 a.m.

**Where:** Gibson Dunn & Crutcher LLP, 1801 California Street, Suite 4200, Denver, CO 80202.

Please visit the bar association website at [www.cwba.org](http://www.cwba.org) for more information and to RSVP.



**Denver**  
**Law Day**

More info at [www.denverseniorlawday.org](http://www.denverseniorlawday.org)

**SATURDAY, OCT. 17, 2015**  
At the Denver Mart • Denver, CO

Every participant will receive a FREE copy of the 2015 Edition Senior Law Handbook!

Colorado seniors and adult children are invited to participate in this outstanding FREE educational conference.

**Program Topics Include:**

- Estate Planning: Wills, Trusts & Your Property
- Living Wills, Advance Medical Directives, DNR Orders, & Proxies
- Hospice, Palliative Care, and Other End of Life Issues
- Powers of Attorney and Guardianship & Conservatorship
- Adult Protection and Elder Abuse
- Social Security
- Medicaid and Medicare
- Veteran's Benefits
- Trust Planning for Individuals with Disabilities

For more information on this program visit us online at [www.denverseniorlawday.org](http://www.denverseniorlawday.org).



Please join our team  
"Women's Estate Planning Council"  
for our 2<sup>nd</sup> year  
to participate

**2015 Walk to End Alzheimer's**

Our fundraising goal is \$1,000 so please help, even if you can't join the walk.

Saturday, September 19<sup>th</sup>  
Registration (8:00am), Opening Ceremony (9:00am), 2.5 mile walk immediately following  
Denver City Park, west of the Museum, Denver, CO 80205

You can join our team or make a donation at:  
[http://act.alz.org/site/TR/Walk2015/CO-Colorado?team\\_id=275763&pg=team&fr\\_id=7365](http://act.alz.org/site/TR/Walk2015/CO-Colorado?team_id=275763&pg=team&fr_id=7365)

For questions, contact our Team Captain, Holly Sutton, at (303) 864-7240 or [hsutton@csbt.com](mailto:hsutton@csbt.com).

## WEPC Board Members 2015-2016

**President: Arlene Barringer**

Arlene@denverprobatelaw.com

**Vice President: Kirsten Waldrip**

Kjacobs04@gmail.com

**Past President: Barbara Tocker Ross**

Barbara@srhassoc.com

**Secretary: Hayley Lambourn**

Hlambourn@steenrodlaw.com

**Treasurer: Beth Staudenmaier**

bstaud@shtax.net

**Membership Co-Chairs:**

*Kimberly J. Raemdonck*

Kim@WiegandAttorneys.com

*Angela Herrick*

aherrick@crestonecap.com

**Programs Co-Chairs:**

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Ayo@labodelaw.com

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gmtrevey@amgnational.com

**Hospitality Co-Chairs:**

*Holly Sutton*

hsutton@csbt.com

*Heidi Gassman*

hgassman@wadeash.com

**Public Relations Co-Chairs:**

*Lisa Hardin*

lhardin@lisahardinlaw.com

*Kristin Dittus*

kristin@dittuslaw.com

**NAEPC Liaison: Maggie Mitchell**

Maggie.mitchell@voya.com

**Membership Ambassador: Melissa Dyer**

melissa.dyer@raymondjames.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!

## 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 working on the newsletter, please contact Kristin or a board member.