
Women's Estate Planning Council Denver, Colorado



Member Involvement Handbook 2016 / 2017



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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

Message from the President

Welcome to the 2016-2017 year! I am honored to serve as President of Women's Estate Planning Council (WEPC). As we enter our 21st year as an organization, I want to emphasize the mission of WEPC, which has aided in the development of such a valuable organization: "To promote interaction between women estate planning professionals; educationally, professionally and socially."

Educationally, our board strives to provide monthly educational programming that reaches the multi-disciplinary estate planning fields of our members. Each of our members have a unique perspective that allows us all to learn and grow as professionals. Additionally, as a WEPC member you are affiliated with and have access to all that the National Association of Estate Planners and Councils (NAEPC) has to offer – from educational programming to professional estate planning designations.

Professionally, WEPC members have the opportunity to network with other members at our monthly meetings and develop lasting professional relationships. All of our members are also encouraged to join the Board or volunteer to serve on a committee. We have also created the opportunity for our members to sponsor our meetings and teach us about their businesses!

Socially, WEPC participates in community outreach events, such as the Alzheimer's Walk and the Multiple Sclerosis Walk, that directly affect those individuals who are often in need of our expertise. Twice a year, WEPC celebrates our members and encourages socialization at our summer picnic and holiday party. Additionally, we enjoy learning about our members personal and career development 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 to exceed 100 members. I encourage you to read this Member Involvement Handbook and learn about the opportunities that WEPC has to offer. This organization is strong because of its members, and we value your ideas and contributions. I am looking forward to a wonderful year!



President

Kirsten Waldrip, Esq.
College for Financial Planning
9000 E. Nichols Ave., #200
Centennial, CO 80112
P: 303-220-4851
E: [kjacob04@gmail.com](mailto:kjacobs04@gmail.com)

Women's Estate Planning Council Officers



Vice President

Holly Sutton, Esq.
Colorado State Bank & Trust
1600 Broadway, 3rd Floor
Denver, CO 80202
P: 303-864-7240
F: 303-864-7300
E: hsutton@csbt.com

Secretary

Karen Salvatore, CFA, CRP
Shine Investment Advisory Services, Inc.
9892 Rosemont Ave., #100
Lone Tree, CO 80124
P: 303-740-8600
F: 303-290-0237
E: karen@shineinvestments.com



Treasurer

Angelia McGill, CPA
Bauerle and Company, P.C.
7887 E. Belleview Ave., #799
Denver, CO 80111
P: 303-759-0089
E: amcgill@bcdenver.com



Immediate Past President

Arlene Barringer, Esq.
Glatstein & O'Brien, LLP
2696 S. Colorado Blvd., #350
Denver, CO 80222
P: 303-757-4342
F: 303-757-4570
E: arlene@denverprobatelaw.com

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

Angela Herrick, Esq.
Crestone Capital Advisors
1050 Walnut Street, #500
Boulder, CO 80302
E: aherrick@crestonecap.com

Co-Chair

Jennifer Lyman, Esq.
Rumler Tarbox Lyden Law Corporation PC
1777 S. Harrison St., #1250
Denver, CO 80210
P: 303-333-7733
E: jlyman@rumlerlaw.com

Membership Ambassador



Debbie Reinberg, MACC
ELDEResolutions
4123 S. Newport Way
Denver, CO 80237
P: 303-717-9577
E: debbie@elderresources.com

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 monthly 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

Gina Trevey, Esq., CTFA
AMG National Trust Bank
1155 Canyon Blvd., #310
Boulder, CO 80302
P: 303-486-1465
E: gmtrevey@amgnational.com

Co-Chair

Ellen Trachman, Esq.
Trachman Law Center, LLC
1515 Wynkoop Street, #360
Denver, CO 80202
P: 303-243-5014
F. 303-448-8882
E: etrachman@trachmanlawcenter.com

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

Heidi Gassman, Esq.
Wade Ash Woods Hill & Farley, PC
4500 Cherry Creek Drive South, #600
Denver, CO 80246
P: 303-322-8943
E: hgassman@wadeash.com



Co-Chair

Kim Raemdonck, Esq.
Wiegand Attorneys & Counselors
280 E. 20th Ave.
Denver, CO 80205
P: 303-741-6410
F: 303-741-6512
E: kim@wiegandattorneys.com

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 quarterly newsletter 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

Kristin Dittus, Esq., LLM
The Law Office of Kristin Dittus
44 Cook Street, #100
Denver, CO 80206
P: 303-780-7390
E: kristin@dittuslaw.com



Co-Chair

Elizabeth Stewart, Esq.
The Stewart Law Group
3773 Cherry Creek North Dr., #575
Denver, CO 80209
P: 720-209-0475
F: 303-399-6480
E: estewart@stewartlawgrp.com

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

Kimberly Curtis, CFP, ChFc, CLU, CAP, AEP, MSFS
Wealth Legacy Institute, Inc.
950 S. Cherry St., #505
Denver, CO 80246
P: 303-753-7578
F: 303-753-7581
E: kcurtis@wealthlegacyinstitute.com

Meeting Dates for 2016/2017 Year

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

June 9, 2016

July 14, 2016 (Summer Social)

August 11, 2016

September 8, 2016

October 13, 2016

November 10, 2016

December 8, 2016 (Holiday Social – date may vary)

January 12, 2017

February 9, 2017

March 9, 2017

April 13, 2017

May 11, 2017

Women's Estate Planning Council

www.wepc.net

