



Fall/Winter 2022-23

WOMEN'S ESTATE PLANNING COUNCIL

NEWSLETTER



YOUR PRESIDENT:

RAQWIN YOUNG

Legacy Planning & Probate, LLC

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

Let's Celebrate!

HAPPY NEW YEAR



"IT'S A JOY TO PROVIDE A SERVICE FOR OTHERS BASED ON MY AREA OF EXPERTISE. I CAN MAKE THINGS EASIER FOR THEM AND GET TO KNOW THEM THROUGH THEIR COLLECTING AND GOALS."



MEMBER SPOTLIGHT: KIMBERLY HONG, SENIOR APPRAISER & ADVISOR THE FINE ART GROUP

About Kim & Her Work:

I currently work as a Senior Appraiser and Advisor for The Fine Art Group. I enjoy my work because every day is different and I'm always learning something new. My work is varied---every client has different needs for their collection. It's a joy to provide a service for others based on my area of expertise. I can make things easier for them and get to know them through their collecting and goals.

Kim's Appraisal & Art Expertise:

I have extensive experience handling the tangible personal property parts of an estate. I can help provide insights for estate planning in regard to collections of fine art, collectibles, jewelry, and other physical objects. I have experience providing USPAP-compliant appraisals for estate purposes. I advise clients on buying and selling art and other items in their collections. All client goals are different, and I provide tailored services to meet their goals whether they are aesthetic, financial, experiential, or philanthropic.

Kim's Hope for WEPC Involvement:

I'm very much looking forward to getting involved with WEPC. I'm passionate about my work and am hoping to meet other professional women who are also engaged in related services. I am very aware that I only know what I know and that my work is only a very small part of estate planning. My hope is to strengthen my knowledge on other aspects of estate planning and gain a network of experienced professionals for my clients. Since I'm also new to the city, I'm looking to make some friends. I'm particularly attracted to the group because it is focused on women. I have always found the best groups in my life have been women supporting women.

More about Kim and who she is outside of work:

I'm originally from St. Louis, Missouri. I moved to Denver from Portland, Oregon in February of this year. I found out I was pregnant during the relocation and gave birth to my first child--Sadie on October 12th. I moved here with my husband, Josh and our dog, Gus. I enjoy reading, painting, running, hiking, cooking, and thrifting.

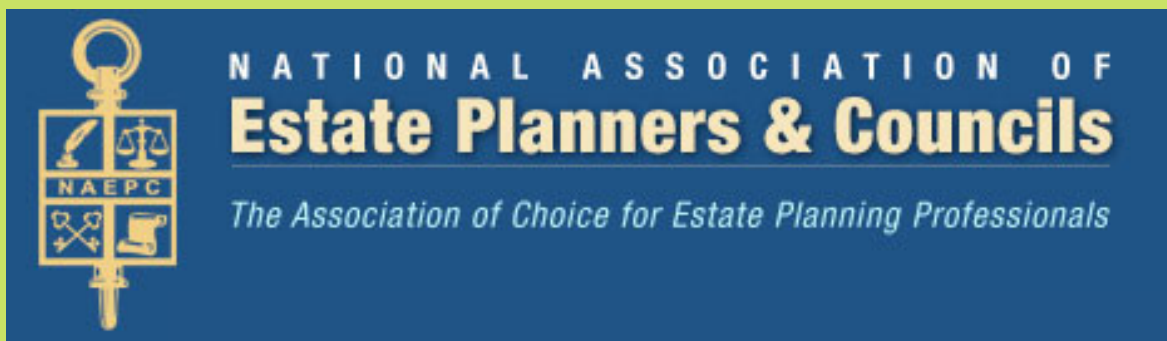


WEPC & Member News

YOUR 2022-23 LEADERSHIP TEAM

• PRESIDENT:	RAQWIN YOUNG	MEMBERSHIP COMMITTEE:	KAYLA NELSON / AMIE TOYAMA
• VICE PRESIDENT:	KRISTIN DITTUS	PROGRAMS COMMITTEE:	JESSICA BECK / ELIZABETH MECK
• SECRETARY	NATALIE GUARD	HOSPITALITY COMMITTEE	COURTNEY BINE / KEVNE SHARP
• TREASURER	ANGELIA MCGILL	PUBLIC RELATIONS:	KELLY ST. GEORGE / CAROLINE THOMPSON
• PAST PRESIDENT	KIM RAEMDONCK		

**WEPC IS A PROUD AFFILIATE OF NAEPC
RECOGNIZED AS A 5-STAR COUNCIL**



Member Benefits & Resources

NAEPC membership resources and education available: (Copy and Paste to access)

<https://www.naepc.org/membership/benefits>

<https://www.naepc.org/membership/benefits/category/5>

The following article reminds and encourages us that we can support each other and make the client experience that much richer:

Transformational Charitable Gifts Through Collaboration

<https://www.naepcjournal.org/wp-content/uploads/issue40.pdf>

Get Your AEP® designation with WEPC sponsorship
(education and history in planning requirements apply)

Contact our liaison Jenne Trembley for details

WEPC & Member News

- Lorni Sharrow is now working out of Moye White's Basalt, CO office and is living in Glenwood Springs, CO. She is serving clients in Denver, along the I-70 corridor, and the Roaring Fork valley. Moye White has a great team with Jeidi Gassman, Chris Scolari, Chris Levkulich, and Yasaman Husseini in Denver, and Scott Grenier also in the Basalt office.
- Mary Flanigen Smith is retiring soon after 47 years in the accounting and tax industry! She has merged her firm with Martillaro Raub and Assoc. ("MRA") and will work them for the next few years as she transitions to the golf course and travelling with her husband, Mike. MRA is a full-service accounting firm that offers Tax Services, Audits and Compilations, and Management Advisory Services.
- Daphne Jean and Lisa Theard of Oasis Senior Advisors would like to announce their retirement, stating:

"It is with much gratitude and great excitement that we are announcing our retirement. We have loved our time spent helping families find the right senior living community for their loved ones and will greatly miss it. We've also enjoyed the time we spent as WEPC members, and our memberships will continue into next year. Thank you for the trust you've put in us to help your clients navigate the senior living world. It has been our privilege to support you and your clients.

We are thrilled to introduce Nastassia Janes, the new owner of Oasis Senior Advisors Denver Metro. We have spoken to Nastassia about what a great organization WEPC is for supporting professional women and providing resources, education, and networking. She plans to become a WEPC member, and we know she will be warmly welcomed and will have a great experience. Nastassia will be continuing the wonderful work of helping seniors and families find the right place. Please reach out to her NJanes@youroasisadvisor.com."

- Kevne Sharpe sang with The Colorado Choir for the holidays. To purchase tickets for future performances, visit: thecoloradochoir.org
- Shannon Tracy was promoted to a Senior Manager on Plante Moran's Wealth Management Tax team this past July.

WEPC In The Community

Walk to End Alzheimers 2022



SUMMER SOCIAL 2022!

COLUMBINE COUNTRY CLUB & FLOWER ARRANGING!



WOMEN'S ESTATE PLANNING COUNCIL HAS BEEN HONORED AS A 5-STAR COUNCIL BY THE NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS (NAEPC)



Women's Estate Planning Council (WEPC) HAS BEEN HONORED AS A 5-STAR COUNCIL BY THE NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS (NAEPC)

Denver, Colorado October 10, 2022 –

The Women's Estate Planning Council (WEPC) has been recognized as a 5-Star Council by the National Association of Estate Planners & Councils as a part of the Leonard H. Neiman and Walter Lee Davis, Jr. Council of Excellence Award program. This honor recognizes estate planning councils that have demonstrated a high level of achievement in areas critical to a successful membership experience.

"The entire NAEPC family is looking forward to the award ceremony scheduled on Tuesday, November 15, 2022 during the 59th Annual NAEPC Advanced Estate Planning Strategies Conference in Fort Lauderdale, Florida. The estate planning councils being recognized as 5 Star Councils provide a high level of member service and are contributing to the success of not only their members, but to the estate planning profession and the community as a whole" NAEPC President Julie A. Buschman said.

The Council of Excellence Award is named for two individuals who truly sought to strengthen the bond between NAEPC and its affiliated councils during their terms on the board. Walter Lee Davis, Jr. served as president of the association in 2008 and was instrumental in forming the Council Relations Committee, a group of volunteer members who are charged with being a liaison between affiliates and the national association. Leonard H. Neiman served the association as a board member for over fifteen years and worked tirelessly to gather information about estate planning councils from around the country.

ABOUT WEPC

The Women's Estate Planning Council ("WEPC"), a no-profit organization 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 in February 1995. From a small group of a dozen women, membership has grown to over 90 professional women and men working in the estate planning field. The council is a member of the [National Association of Estate Planners & Councils](#), the leading professional organization for estate planners, which provides its 2,100+ Accredited Estate Planner® designees and over 275 affiliated local estate planning councils and their 30,000 members with ongoing education and a forum for professional networking. For additional information contact: Board President, RaQwin Young Krizan at 303.876.7662 or ryoung@younglawgolden.com.

Special Thanks to all of our Sponsors!

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ARE YOU LINKEDIN?

JOIN THE WEPC LINKEDLN 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 WEPC continue to grow.

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