

**COLORADO PHILANTHROPIC ADVISORS NETWORK  
2012 MEMBERSHIP INFORMATION SHEET**

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email Address: \_\_\_\_\_

**Professional Affiliations:**

\_\_\_\_\_ Colorado Planned Giving Roundtable

\_\_\_\_\_ Estate Planning Council (please specify) \_\_\_\_\_

\_\_\_\_\_ Advisors in Philanthropy

\_\_\_\_\_ Other \_\_\_\_\_

What do you want to get from being a member of CPAN \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Topics of Interest, Speaker Ideas, Comments, Etc. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**2012 Meeting Dates are:**

January 30, April 30, July 30, & October 29, 2012 – 11:30 a.m. to 1:30 p.m.

Annual dues of \$130 will be prorated throughout the year for new members.

**Please make checks payable and remit to:**

Colorado Philanthropic Advisors Network

c/o Wesley Weise, Northern Trust, 1573 Market Street, Denver, CO 80202

Questions: Visit [www.cpanco.org](http://www.cpanco.org) or contact Jeff Watkins, CPAN President, at [jwatkins@eksh.com](mailto:jwatkins@eksh.com)  
or 303-740-9400

# **Mission & Objectives of the Colorado Philanthropic Advisors Network (CPAN)**

Colorado Philanthropic Advisors Network is a multi-disciplinary group of family advisors committed to encouraging and implementing philanthropic principles and strategies in their clients' legacy planning through the use of teamwork, mutual education, and communication.

## **Our Objectives:**

1. Encourage and inspire philanthropy in our community, with each of us and with our clients.
2. Exchange ideas and information to support each other in being a more effective advisor for our clients in communicating and inspiring philanthropy and the many benefits it has to families and our community.
3. Be a catalyst for expanding our personal networking and collaboration capabilities to help reach the first two objectives.

## **The CPAN Board of Directors:**

President: Jeff Watkins, Ehrhardt, Keefe, Steiner & Hottman PC

Vice President: Erik Bernstein, Starwood Consulting, LLC

Secretary: Ronnie Rosenbaum, Rosenbaum Associates

Treasurer: Wesley Weise, Northern Trust

Board Member: Bruce DeBoskey, The DeBoskey Group

Board Member: Mike Hogan, Foundation Source

Board Member: Marilyn McWilliams, Moye White, LLP

Board Member: Melissa Montgomery-Fitzsimmons, First Western Trust Bank

Board Member: Mark Ricketson, Fidelity Charitable Services

Board Member: William Schmidt, First Western Trust Bank

Board Member: Sara Silva Montgomery

**Format of our Meetings:** We meet quarterly for two hours. Our format includes:

- 1) Connecting and fellowship time
- 2) Speaker presentation
- 3) Small group discussion on the topic, professional relationship strengthening, and collaboration enhancement

