



GOLDEN GATE UNIVERSITY

School of Law

***ADVANCE REGISTRATION IS REQUIRED.
SPACE IS LIMITED.***

**San Francisco Estate Planning Council
& Golden Gate University School of Law
First Annual Estate Planning Advisor Seminar**

“Challenges and Issues Dealing with Elderly Clients”

November 4, 2011 9:30 AM – 1:30 PM

As every estate planning professional knows, our rapidly aging baby boomer population is creating unique challenges and opportunities for advisors in the estate planning field. This program features outstanding speakers who should make this a stimulating and entertaining program.

Where:

Golden Gate University, located at 536 Mission Street (between First and Second Streets) in San Francisco. To see a map and information about nearby parking, go to:

http://www.ggu.edu/student_services/student_life/parking_in_san_francisco/attachment/Parking.pdf

Program:

9:00 am to 9:30 am – Registration

ADVANCE REGISTRATION IS REQUIRED. SPACE IS LIMITED.

9:30 am to 10:30 am -- Deborah Dolch, Private Fiduciary. *“Through the Looking Glass – Four Vignettes”*. Deborah will describe four different case studies where estate planning needed to be changed or was not in place that demonstrate issues concerning undue influence and cognitive changes in elder clients.

10:45 am to 11:45 am -- Chief Neuropsychologist Dr. Joel Kramer and Clinical Nurse Specialist Dr. Jennifer Merrilees, from UCSF’s Memory and Aging Center, *“Understanding Cognitive Changes in the Elderly.”* Learn from distinguished leading experts about how your brain works and changes with age, the latest findings regarding Alzheimer’s and other age related neurological conditions.

Noon to 1:30 pm (lunch program) -- Elizabeth Loewy, Assistant District Attorney, Attorney in Charge/Elder Abuse Unit, NY County District Attorney’s Office. *“The Brooke Astor Trial, a Cautionary Tale”*. Brooke Astor was the beloved doyenne of New York society who died in 2007 at the age of 105. Two years later, in a scandal that rocked New York City, both her son and estate planning attorney were convicted and sentenced to jail with respect to their part in Mrs. Astor’s care, and estate and financial planning. Ms. Loewy, one of the prosecutors who tried the case, will talk about that trial and other criminal cases involving elder financial exploitation. This talk is sure to hold lessons for practitioners seeking to protect their aging clients from fraud and financial abuse.

Payment: \$80 per member or member guest (includes lunch)

By Check - Please make your check payable to the San Francisco Estate Planning Council and mail it to: Bonni Hendricks, SFEPC, 781 McKean Place, Concord, California 94518

Pay Online with CREDIT CARD - <https://www.123signup.com/calendar?Org=sfepc>

Continuing Education Credit:

This event qualifies for **Three (3) hours** of continuing education credit.

MCLE: The San Francisco Estate Planning Council is a State Bar of California approved Provider.

CPA & CFP®: A sign-in sheet and an attendance certificate are provided at each meeting.

Questions: Bonni Hendricks at: 925.686.4819

Thank you to our Sponsors:

Borel Private Bank and Trust Company

Barulich Dugoni Law Group, Inc.

Carr, McClellan, Ingersoll, Thompson & Horn, Professional Law Corporation

Hopkins & Carley, A Law Corporation

Mt. Eden Investment Advisors

Sideman & Bancroft LLP

Seiler & Company LLP