



Protecting the Vulnerable: Financial Abuse, Powers of Attorney and Related Issues

The registration fee is \$575 - includes: course materials (which will be distributed electronically).

Location and Date:

September 30th - 1:30 pm – 3:30 pm

October 1st - 10:00 am – 12:00 pm and 1:30 pm – 3:30 pm

GoToTraining online platform

Course Outline

- Life Planning/Why to get a Power of Attorney and how it differs from other legal appointments/orders
- Technical information – what is a valid POA, witnessing, who can act as an Attorney, what to do when presented with a POA, accounting, termination, etc.
- Elderly members making accounts joint
- Suspected Financial Abuse

Frequently Asked Questions

- Restrictions on an Attorney's ability to make gifts
- Attorney's ability to borrow
- Can attorneys charge fees?
- What can credit unions do when they suspect financial abuse?
- Care home vulnerable adult accounts
- Other questions posed by credit unions

Scenarios/Case Studies

- Provided by credit unions and other legal studies
- Discussed by presenters and POA and financial abuse group work

Questions and Answer Session (of Presenters)

- Participants are asked to bring along scenario questions
- Ask the expert

Delivered by lawyer Lindsay Oliver and Randy Sandbeck, both partners with Olive Waller Zinkhan & Waller LLP.