



Annual Estate Planning Conference

MCLE: 2.0 Skills 1.0 Ethics

Date & Time:

Thursday, October 12, 2017 at Strathallan Hotel Rooftop

9:00am – 12:00pm (8:30am breakfast & registration)

Co-Chair: Nancy Klotz, Esq., *Tompkins Trust Company*

Co-Chair: Lynn Carleton, *Canandaigua National Bank & Trust*

Keynote Speaker:

Mary F. Radford, Esq., *Marjorie Fine Knowles Professor of Fiduciary Law, Georgia State University, College of Law*

Panel Discussion to follow.

Program Topic:

Recognizing and representing clients with diminishing capacity.

Individuals age 65 or older currently represent about 15% of the US population. This figure continues to rise with Baby Boomers turning 65 every day. Longer lives are unfortunately accompanied by diminishing mental capacity and increased vulnerability. Clients and potential clients whose capacity is diminishing present complex ethical challenges to professionals who are advising them. Using examples from cases that have achieved notoriety in recent years, this presentation will explore the challenges of working with clients who have diminishing capacity.



GENESEE
VALLEY
TRUST



Trust Services™



WILMINGTON
TRUST

AN M&T COMPANY

Wealth
Strategies
Group



Canandaigua
National
Bank & Trust



The art of representing people®



Bank of America Private Wealth Management



Exeter Trust Company



Harter Secrest & Emery LLP
ATTORNEYS AND COUNSELORS

Special thanks to our underwriters.

For registration visit our website at www.mcba.org/calendar
or email Dianne Nash at dnash@mcba.org

Name of Program: **Annual T & E Conference**
Date: **10/12/2017 9am-12pm**
Place: **Strathallan Hotel Rooftop**

MCBA Member: \$105 T & E Section member: \$90 Nonmember: \$175
Legal Services:/New Admittee \$60 EPC Member \$90

AFTER 10/5/17- all registrations are \$10 more

I will use a CLE pass or Enclosed is a check for \$_____ for _____ reservation(s) for:

REGISTRANT(S): _____ PHONE: _____

ORGANIZATION: _____ FAX: _____

ADDRESS: _____ E-MAIL: _____

Please enclose check payable to MCB Center for Education and send to:
MCBA Registrar, One West Main St., 10th Floor, Rochester, NY 14614

If you wish to charge this program, please complete the following and fax directly to the MCBCFE,

Please circle: MasterCard Visa AmEx Total Amount \$_____ Expires: ____/____ Sec. Code _____

Account #: _____ Cardholder's Signature: _____

To apply for tuition assistance, see our Financial Hardship Policy at mcba.org/cle/tuition

*Legal Service Providers: Staff attorneys for Empire Justice, LawNY, The Legal Aid Society of Rochester, VLSP, and Worker Justice Center who are members of MCBA in good standing.

* New Admittee refers to attorneys who are members of the MCBA and in their first year of practice.

In order to receive refund any cancellation must be made no later than FIVE business days prior to program. This also applies to CLE pass holders.

For Financial Assistance please see www.mcba.org/cle/tuition-assistance

All materials are provided electronically by email prior to the program. Please plan accordingly.