

MCLE PROGRAMS

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Financial Exploitation & Undue Influence by Romantic Partners, Adult Children, Paid Caregivers & Neighbors

Learn to recognize common patterns, and strategically sharpen your skill set to navigate and resolve derivative issues

Estate planners, elder lawyers and family law practitioners must be able to identify and address financial exploitation and undue influence by individuals in positions of trust when they encounter it. Learn how to handle issues that arise in the context of subsequent marriages with children from prior relationships; new romantic relationships; and sibling disputes when siblings argue over parents' assets, access to parents, and use of the assets. Get practical tips for navigating the issues that can arise with "helpful" neighbors, and with caregivers and vendors/contractors who influence for their own financial gain. Master the strategies for using elder protective services, DPOAs, and conservatorships and guardianships when concerns of influence and exploitation arise.

Agenda

- 12:00 - 12:04 pm, Welcome and Introduction
- 12:04 - 12:22 pm, Financial Exploitation & Undue Influence: View from the Care Manager's Perspective
- 12:22 - 12:57 pm, Clinical Evaluations of Capacity, Types of Capacity for Various Decisions, Susceptibility to Undue Influence, Capacity for Informed Consents/Refusals
- 12:57 - 1:33 pm, Statutory Law of Financial Exploitation and Case Law on Undue Influence, Substantive Standards & Procedural Strategies, Private Rights of Action, Collateral Actions
- 1:33 - 1:55 pm, Evidentiary Thresholds in Capacity, What It Takes to Present A Prevailing Case, View from the Bench

Chair

- Lisa M. Cukier, Esq., Rubin Rudman LLP, Boston

Faculty

- Dr. Elizabeth H. Nasser, Ph.D, Centers for Aging and Memory, Northborough
- Hon. Lee M. Peterson, Probate and Family Court, Commonwealth of Massachusetts, Canton
- David Sadownick, LICSW, CMC, LifeCare Advocates, Newton

Dates

- ON DEMAND WEBCAST (#2220024WBA): Watch starting Thursday, 10/21/2021

Tuition

- \$145.00
- \$145.00 Members
- \$145.00 New Lawyers
- *FREE* for MCLE OnlinePass Subscribers
- Email scholarships@mcle.org to apply for a need-based scholarship.

Materials Included with Your Tuition

- All presentation materials, including faculty slides and handouts, in electronic format
- Transcript emailed 2 weeks post-program

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- Earn up to 2 substantive

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