

Guardianships and Conservatorships

Cosponsored by the Elder Law Section

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Guardianship and conservatorship are key components of an elder law practice. More clients are turning to the courts to help them manage the challenges experienced by aging relatives with diminished capacity and individuals who have intellectual disabilities or severe mental illness. Mastering the concepts involved in establishing a guardianship or conservatorship and advising lay fiduciaries will prepare you for the future. This program covers the basic elements of protective proceedings and includes sample pleadings to help you develop your expertise. Gain an understanding of guardianship for adults, alternatives to guardianship, and conservatorship. Get a judge's perspective on attorney fee requests and hearings in contested cases. Learn about advising lay fiduciaries as well as the court rules on fiduciary education. Explore the ethics issues often found in contested cases and examine your responsibilities as a mandatory reporter under Oregon's elder abuse laws.

Register by 10/2/17 and save \$20.

Elder Law Section members save \$20 off registration rates.

Friday, October 6, 2017

8:30 a.m. – 4:30 p.m.

Oregon Convention Center

777 NE Martin Luther King Jr. Blvd
Portland, Oregon

CLE credits: 4.25 General *or* Practical Skills, 1 Ethics, and 1 Elder Abuse Reporting

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LIVE EVENT



Early registration discount

Register by 10/2/17 and save \$20

- \$125 ONLD member
- \$180 Elder Law Section member
- \$200 OSB member
- \$210 Non-OSB member
- \$30 Lunch
- \$15 Print course materials
(Electronic materials are included with your registration.)

LIVE WEBCAST



- \$200 Webcast registration
(Includes online access to recorded seminar for 60 days after the live event.)



Questions or need help with registration?

Call the OSB CLE Service Center:
(503) 431-6413 or (800) 452-8260, ext. 413

50-Year and Active Pro Bono OSB members and Oregon judges and their lawyer staff – please call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413 to register for the live seminar.

7:30 Registration

8:30 Welcome – The Future of Protective Proceedings

Michael Levelle

2017 Oregon State Bar President

8:45 Guardianship for Adults and the Alternatives

- Assessing the need for guardianship
- Procedure and pleadings
- Emergency proceedings
- Guardian's powers and duties

Tim McNeil, *Davis Pagnano McNeil & Vigna LLP, Portland*

9:45 Conservatorships

- Procedure and pleadings
- Conservatorships for minors
- Managing the estate
- Accountings

Julie Meyer Rowett, *Yazzolino & Rowett LLP, Portland*

10:45 Break

11:00 Advising Lay Fiduciaries

- Guardian Partners programs and experience
- Court requirements for fiduciary education
- Lay fiduciary training overview

Leathan Teal, *Educational Manager, Guardian Partners, Portland*

Mark M. Williams, *Gaydos Churnside & Balthorp PC, Eugene*

Noon Elder Law Section Annual Meeting

12:15 Lunch

1:15 Protective Proceedings

- Hearings in contested cases
- Tips and traps for conservatorship accountings
- Attorney's fees requests

The Honorable Paula Bechtold, *Coos County Circuit Court, Coos Bay*

The Honorable Claudia Burton, *Marion County Circuit Court, Salem*

2:15 Ethics Issues in Contested Cases

- Identifying conflicts of interest
- Representing a person with diminished capacity
- Working with self-represented parties
- Getting paid, ethically

Lisa Bertalan, *Hendrix Brinich & Bertalan LLP, Bend*

Denise Gorrell, *Samuels Yoelin Kantor LLP, Portland*

Stephen Owen, *Attorney at Law, Portland*

3:15 Break

3:30 Oregon Elder Abuse Reporting Requirements

- Recognizing elder abuse
- Financial exploitation and "wrongful taking"
- Protecting client confidentiality

Mark Johnson Roberts, *Oregon State Bar, Tigard*

4:30 Adjourn

Planning Committee

Kay Hyde Patton, *Chair, Leahy Van Vactor Cox & Melendy LLP, Springfield*

Penny Davis, *Davis Pagnano McNeil & Vigna LLP, Portland*

Denise Gorrell, *Samuels Yoelin Kantor LLP, Portland*

Rebecca Kueny, *The Pixton Law Group, Lake Oswego*

Jennifer Kwon, *Kwon Law LLC, Portland*

S. Jane Patterson, *Attorney at Law, Gresham*

Julie Meyer Rowett, *Yazzolino & Rowett LLP, Portland*

Mark M. Williams, *Gaydos Churnside & Balthrop PC, Eugene*

Products

ELD17.KCDE
Audio CDs with electronic materials \$200

ELD17.KDVE
DVDs with electronic materials \$230

This seminar will be available on-demand after the live program. Please visit osbar.inreachce.com and search for ELD17. On-demand access is available for 60 days after the date of purchase.

General Information

Cancellations: Cancellation requests must be received by the OSB CLE Service Center at least 72 hours prior to the date of the seminar to qualify for a refund. Refunds are subject to a \$25 cancellation fee.

Tuition Assistance: Email a request stating your financial situation to cle@osbar.org no later than one week before the seminar.

Dietary Restrictions or Accessibility Accommodations: Please make your request at least 72 hours before the date of the seminar.



Upcoming Seminars

September 7

All Day PowerPlay (ADPP17)

- Nobody Told Me There'd Be Days Like These: Stress, Pressure, and Ethical Decision-Making in the Practice of Law (DLT17)
- Mandatory Elder Abuse Reporting for Lawyers (EAR117)
- The Accidental Lawyer: Terms of Engagement (ACL17)

September 15

Current Developments in Federal Indian Law

September 22

Deposition Techniques and Strategy featuring David Markowitz (DEP17)

October 5

Law, Practice, and Policy at the Bleeding Edge – 2017 Technology Law Updates (TECH17)

October 12-13

Fundamentals of Oregon Civil Trial Procedure

October 19

Broadbrush Taxation: Tax Law for the Non-Tax Attorney (BBT17)

October 26-27

Oregon Trial Advocacy College

Register now at osbar.inreachce.com and search by program code.



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