

Greetings. As we look ahead to our February EPCDV meeting, our focus is on another issue related to the aging of our population: Diminishing cognitive capacity and issues related to undue influence.

A few statistics: According to a 2006 study by the American Psychological Association, older adults represent 13% of the current US Population. Further, they also estimate that by the year 2030, over 20% of the U.S. population will be over the age of 65. Finally, a 2008 study by Brenda Plassman estimates that as of 2002, approximately 5.4 million people (22% of adults age 71 or older) had some form of cognitive impairment exclusive of dementia. Given that many of us serve some proportion of older clients, there is reason to believe that at some point in our professional practices that we may find ourselves dealing with situations where a loss of capacity exists, or will exist at some point.

With this in mind, I anticipate that our February program, featuring Virginia Palmer and Dr. Vivian Clayton, who were presenters at the recent 2014 Southern California Tax & Estate Planning forum, will be timely and useful to those of us who are active practitioners in Estate Planning related field. I look forward to seeing you all at our next meeting on February 18th.

- Geoff

Geoffrey M. Zimmerman, CFP®
President, EPCDV 2014-2015

February 18th, 2015

Lafayette Park Hotel 3287 Mt. Diablo Blvd. Lafayette, CA

6:00 P.M. Wine and Registration

6:30 P.M. Dinner and Speaker

Member Cost: \$50.00 dinner (preregister) / \$55.00 (at the door)

Guest Cost: \$55.00 dinner (preregister) / \$60.00 (at the door)

Reservations and cancellations must be received by Monday,

February 16 at 2:00 p.m. to be assured of a reservation.

Please send your check today! **or Pay with a credit card online**

<https://www.123signup.com/register?id=yynjs>

“Assessing Diminished Capacity and Susceptibility to Undue Influence: Evaluation Tools and Interview Techniques”

This month's speakers, Virginia Palmer and Dr. Vivian Clayton, will discuss cognitive changes that normally occur with age, interview techniques and indications that the practitioner should watch for in working with clients who may have diminished capacity or be subject to undue influence.

About the Speakers

Virginia Palmer is a partner with Wendel Rosen's Trusts & Estates Practice Group. She focuses her practice on estate planning, probate, trust administration, and elder law and mediating matters in her practice area. She has particular expertise in estate planning for both traditional and non-traditional families. In addition, she serves as a Pro Tem Judge in the Alameda County Superior Court Probate Department and is a court-appointed guardian *ad litem* for minor children and incapacitated adults.

Dr. Vivian Clayton is a licensed clinical psychologist specializing in geriatric neuropsychology. She received her doctorate in psychology from the University of Southern California, where she was based at the Andrus Gerontology Center, where her research, on defining an empirical definition of wisdom and relating it to the aging process, has served as a foundation for a now well established field of pursuit within the area of academic psychology. Dr. Clayton received post-doctoral clinical training at the California School of Professional Psychology in Berkeley, California.

REGISTER NOW!!!

<https://www.123signup.com/register?id=yynjs>

Dinner Menu

Salad

Caesar Salad

Entrée

Whole roasted pork loin, Roasted potatoes, blue lake beans, mushroom jus

Vegetarian

Risotto Croquettes

Dessert

Raspberry mousse parfait, with red sponge cake