

President's Message

A full house was present to hear Virginia George speak on the issue of financial elder abuse. The statistics are chilling. As Virginia reminded us, wealth does not insulate one from the potential for such abuse – you need only recall the relatively recent cases of Brooke Astor or Doris Duke to know this is true. As professionals, we work closely with clients and may be in a position to observe the symptoms of abuse. Should this occur, and where confidentiality is not an obstacle, there are actions that we can take – including referral to one or more of the resources Virginia referenced in her talk.

April finds many of our CPA colleagues immersed in the thick of tax season. To those of you so engaged, we'll think of you as you toil away the days (and nights) until the 15th. As has become a tradition, our April meeting is an occasion to welcome our East Bay and Tri-Valley Council colleagues who join us this month. We look forward to your participation.

-Kevin Gahagan

**Cognitive Functioning, Aging,
and the Capacity to Make Difficult Decisions:**

A Primer for Estate Planning, Accounting, and Other Financial Professionals

Adam Alban will provide an overview of the cognitive changes associated with aging and explain how those changes can impact professionals' abilities to interact with their clients. His discussion will address some of the common myths about age-related cognitive decline. These changes inevitably impact the work of professionals with fiduciary responsibilities who are charged with ensuring the competence of their clients' decisions.

Wednesday, April 16, 2008

*Lafayette Park Hotel
3287 Mt. Diablo Blvd.
Lafayette*

*6:00 PM. Wine and Registration
6:30 PM Dinner and Speaker*

**Cost: \$40.00 dinner (if mailed in)
\$45.00 (at the door)**

*Reservations and cancellations must
be received by Monday, Apr 14th at
1:30 p.m. to be assured of a
reservation. Please send your check in
the enclosed envelope today! or call
Bonni at:*

925.686.4819

Adam has an M.A. and PhD in clinical psychology from Michigan State University. He also has a J.D. from American University and is admitted to practice law in California. Adam's clinical practice focuses on assisting other professionals to understand, assess and navigate the complicated and often intertwined issues of cognitive status and legal capacities. He consults with attorneys, accountants, financial planners and other professionals to help them assess their own professional responsibilities and the needs of their clients whose abilities to make critical decisions may be compromised.



Mark Your Calendars!

**May 21, 2008
Annual Meeting
Bette Epstein**

**Planning to Avoid Estate Litigation
from a Litigator's Perspective**

**June 18, 2008
A Field Trip!**

**Bonhams and Butterfields
Estate Auction House**

Welcome

East Bay

And

Tri Valley

Estate Planning Councils!