

OBA/CLE and the Master Lawyers Section Present:

Elder Investment Fraud and Financial Exploitation: Ethical Traps for Lawyers and Navigating the Challenges of Diminished Financial Capacity

Oklahoma City Annual Meeting

- DATES & LOCATIONS:** November 4, 2015
Sheraton Bricktown
Oklahoma City, OK
- CLE CREDIT:** This course has been approved by the Oklahoma Bar Association Mandatory Continuing Legal Education Commission for 3 hours of mandatory CLE credit, including 1 hour of ethics.
- TUITION:** \$75 for early-bird registrations received with payment at least four, full business days prior to the first seminar date; \$100 for registrations received with payment within four, full business days of the first seminar date. Walk-ins \$150. **Free** to Master Lawyers Section members! Register online at <http://www.okbar.org/members/CLE>.

Program Planners/Moderators:

Irving L. Faught, Administrator, Oklahoma Securities Commission

Jennifer Shaw, Enforcement Attorney, Oklahoma Department of Securities

As demonstrated by the sensational Brooke Astor case and other less notorious examples, a lawyer who is ignorant of elder investment fraud and financial exploitation (EIFFE) may fail to protect the client from harm or unwittingly participate in the client's victimization. Such lawyers may face professional discipline, liability for malpractice, or even criminal charges. On a broader scale, EIFFE costs victims, families, governments, and businesses more than \$2.9 billion annually and affects millions of older persons. Every lawyer needs to understand how the growing epidemic of EIFFE may affect them professionally and personally. Oklahoma is one of six states in which the American Bar Association and the Investor Protection Trust are piloting a new initiative—the EIFFE Prevention Program Legal—to raise awareness among lawyers. This CLE program will (1) present the demographic and physiologic changes occurring in the U.S. population that increase the likelihood that lawyers will deal with diminished financial capacity and EIFFE in their work and in their families; (2) pose ethical and practical dilemmas that challenge lawyers and provide tips for addressing those dilemmas; and (3) teach indicators of EIFFE and suggest options for assisting victims. Presenters will be national and Oklahoma experts on EIFFE, financial decision-making capacity, and ethical rules.

8:30 a.m. Registration and Continental Breakfast

9:00 a.m. Introduction to the EIFFE Prevention Program: Recognizing the Signs of Mild Cognitive Impairment

Dr. Robert E. Roush, Baylor College of Medicine and EIFFE Prevention Program
Medical
Don M. Blandin, President and CEO, Investor Protection Trust and Investor Protection
Institute
Irving L. Faught, Administrator, Oklahoma Securities Commission

9:30 a.m. Strategies for Elder Abuse Litigation: The Mickey Rooney Case

Vivian Lee Thoreen, Partner, Holland & Knight LLP, Los Angeles, CA

10:10 a.m. Ethical Traps for Lawyers and Navigating the Challenges of Diminished Financial Capacity (ethics)

Lori A. Stiegel, American Bar Association Commission on Law and Aging and EIFFE
Prevention Program Legal

10:50 a.m. Break

11:00 a.m. State Advisory Panel Elder Law – Moderator: David Poarch

Katie Ogden, Assistant General Counsel Oklahoma Bar Association
Donna J. Jackson, Oklahoma City
James C. Milton, Hall Estill, Tulsa
Gail Wettstein, DHS Adult Protective Services
Peter Haddock, Assistant District Attorney Oklahoma County

11:50 a.m. Adjourn

CANCELLATIONS:

Cancellations will be accepted at any time prior to the seminar date; however, a \$25 fee will be charged for cancellations made within four full business days of the seminar date. Cancellations, refunds, or transfers will not be accepted on or after the seminar date.

EIFFE Prevention Program Legal

Full Name _____

Firm _____

Address _____

City _____ State _____ Zip _____

Phone () _____ E - Mail _____

Are you a Member of OBA? Yes No OBA Bar# _____

Make Check payable to the **Oklahoma Bar Association** and mail entire page to: **CLE REGISTRAR**, P.O. Box 53036, Oklahoma City, OK 73152

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You will receive a link to download materials in advance of the seminar. If you would like a hard copy of the materials, there will be a \$25 charge.

Hard Copy \$25

Register online at

www.okbar.org/members/cle

****Printed materials will not be available the day of the seminar; however, you can order a copy to be mailed to you at a later date for \$25.**