**TODAY’S AGENDA**

8:00 - 9:00 am  
Event Registration  
Sponsor Exhibits Open  
Ask-A-Lawyer Sign up

9:00 am  
Keynote Address  
*Michael Dougherty*  
Twentieth Judicial District Attorney

10:00 am  
Session 1 Presentations

11:00 am  
Session 2 Presentations

12:00 pm  
Session 3 Presentations

As you leave  
Turn in Event Surveys and Pick up Senior Law Handbooks

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**2019 BOULDER COUNTY SENIOR LAW DAY PLANNING COMMITTEE**

Erica Corson  
*Boulder County Area Agency on Aging*

Marjie Griek  
*Community Volunteer*

Brett E. Landis, Esq.  
*Boulder County Legal Services*

Lizbeth Parker  
*Community Protection Division, Boulder County District Attorney’s Office*

Sarah Pheral, Esq.  
*Law Office of Sarah Pheral, LLC*

Peter Rogers, Esq.  
*Peter Rogers Family Law*

Susan Spaulding, Esq.  
*City of Longmont Community Relations*

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**SPONSOR EXHIBIT TABLES** are located in the Lobby and Levin Hall. Take time to visit with the businesses and organizations that generously sponsor our event.

**15 minute Ask-A-Lawyer conferences** run from 9:00 am – noon *by appointment only* in the gymnasium. Sign-ups are first come, first served in the Ask-A-Lawyer conference area. If there are no available sessions, please check back later; sessions may open up later in the day.

**COLORADO SENIOR LAW HANDBOOKS** may be picked up as you leave the event when you turn in your Event Survey.

*Thank you for completing our Event Survey. Your comments are valued and vital to planning Senior Law Day in future years.*
THANK YOU 2019 SPONSORS!

Sponsorships from these businesses and organizations ensure that this event will continue to provide important legal information and resources to seniors in Boulder County.

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THANK YOU TO ASK-A-LAWYER VOLUNTEERS

Douglas Holden
Steven Janssen
Richard Selinger
Louisa Young
Jodie Gilbert
Pete Rogers
Brett Landis
John Estes
Marianne Luu-Chen
Kurt Hofgard
KEYNOTE ADDRESS  9:00 am

Title:  Your Safety and Well-being: Preventing and Combatting Elder Abuse and Scams
Speaker:  Michael Dougherty, 20th Judicial District Attorney
Room:  Levin Hall
Description:  Elder abuse is an injustice with serious consequences for our victims and community. In addition to the trauma for the victims, elder abuse impacts our community’s health, safety and economic welfare. There are too many scams being perpetrated against our older population — particularly through the use of computer devices and phones. In his keynote address, Mr. Dougherty will review the predominant elder abuse issues facing our community, share current trends in investigating and successfully prosecuting cases involving elder abuse, and highlight what we can do together to better prevent and address the abuse of our older community members.

Speaker Bio:  Michael Dougherty is honored to serve as the elected District Attorney for the 20th Judicial District (Boulder County). He has lived in Boulder since moving to Colorado to oversee the Justice Review Project, an effort to address wrongful convictions in the State of Colorado. Mr. Dougherty has served as the second-in-command for the First Judicial District (Jefferson and Gilpin Counties) and as the head of the Criminal Justice Section of the Colorado Attorney General’s Office. Mr. Dougherty started his career as a prosecutor with the Manhattan District Attorney’s Office. He currently serves on the Executive Committee for the statewide District Attorneys’ Council, and he is a member of the Colorado Best Practices Committee for Prosecutors. He is the proud father of 11-year-old twins.

SESSION 1  10:00 am

Title:  Estate Planning Basics
Speaker:  Sarah Pheral, Esq., Law Office of Sarah Pheral, LLC
Room:  Levin Hall
Description:  This session addresses the basics: How do I make sure the things I care about happen if I’m very sick and when I die? What is an estate plan and why do I need one? What happens if I don’t have these documents? We’ll also discuss powers of attorney, wills and trusts, probate, estate taxes, tips, and potential pitfalls.

Speaker Bio:  Sarah Pheral is a solo attorney. Her firm, the Law Office of Sarah Pheral, LLC, is located in Longmont. Her practice includes business law in addition to estate planning, probate, and elder law. Sarah assists clients with drafting and using estate planning documents such as powers of attorney, wills, trusts, and advance medical directives; probate; trust administration; guardianships and conservatorships; and more. She also serves as a professional fiduciary (agent, trustee, conservator, or PR).

Title:  Fiduciaries’ Roles and Responsibilities
Speaker:  Anne B. Jorgensen, Jorgensen, Brownell & Pepin, P.C.
Room:  L130
Description:  This presentation will seek to define a fiduciary and the expectations that govern every fiduciary. A fiduciary handles the assets of another person, so the standards of care are high. Fiduciaries include: agent under power of attorney, conservator, and trustee, among others. The presenter will discuss and evaluate common pitfalls that can lead to problems and how to avoid those problems.

Speaker Bio:  Anne B. Jorgensen practices in areas of estate planning, trust litigation, probate, conservatorships, and guardianships. In addition, she handles matters involving VA aid, and is an accredited attorney by the U.S. Department of Veteran Affairs. Always creative, genuine, and tenacious, she makes every effort to meet the various needs of her clients. Anne believes educating her clients empowers them to make better informed decisions for themselves and their loved ones.
**Medicare Fraud**

**Speaker:** Teresa DeAnni, **Healthy Aging Programs Manager for Boulder Co. Area Agency on Aging**

**Room:** Board Room

**Description:** We lose $16B per year nationwide in the US to Medicare fraud. Find out about all aspects of fraud pertaining to Medicare. Understand recent trends in Medicare fraud. After this presentation, you will know what to look for and what to do if you find something questionable. This presentation will also address what insurance agents can and cannot do. Boulder County Area Agency on Aging is home to the Senior Medicare Patrol. The SMP consists of counselors and volunteers who educate and follow up with fraud inquiries.

**Speaker Bio:** Teresa DeAnni is the Healthy Aging Programs Manager for Boulder County Area Agency on Aging (AAA). She has a Master’s Degree in Gerontology and Long Term Care Management and has been with the AAA for 20 years. Prior to working with the AAA, she managed a personal care boarding home and worked for a hospice organization and an adult day care center.

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**How to Pick a Lawyer:**

**Tips & Resources for the Right Attorney-Client Fit**

**Speaker:** Brett Landis, Esq., **Boulder County Legal Services**

**Room:** 200

**Description:** This talk will focus on the various issues that arise when someone is seeking an attorney, including: when is it necessary to start looking for an attorney; how to decide what type of attorney to contact; what to research before meeting with an attorney; what questions to ask at an initial consultation; and how to decide if the attorney is right for you and your situation. Brett will also address some community resources that may be helpful in the attorney search.

**Speaker Bio:** Brett Landis is the Managing Attorney of Boulder County Legal Services. She received her BA from Carleton College and her JD from the University of Oregon. Brett worked with the Domestic Violence Clinic in Eugene, OR after graduation and later worked for Legal Aid Services of Oregon in Klamath Falls, OR. Brett also practiced family law with the law firm Warren, Carlson & Moore in Niwot. She serves on the Availability of Legal Services and Access to Justice committees and as a board member for the local Bar Association.

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**Medicaid For Long-Term Care Planning**

**Speaker:** John M. Estes, Esq., **The Kapsak Law Firm**

**Room:** Levin Hall

**Description:** This presentation will cover the basics of Long-Term Care Medicaid and Eligibility for Long-Term Care Medicaid. It will cover eligibility requirements, changes to the Medicaid program, and common mistakes that people make when applying.

**Speaker Bio:** John is an attorney at The Kapsak Law Firm in Longmont, CO, where his practice focuses on Estate Planning, Estate Administration, and Elder Law, including Medicaid planning and planning for Long-Term Care needs. Prior to joining The Kapsak Law Firm, John worked for Colorado’s State Medicaid department, drafting long term care regulations. John proudly serves as President of the Longmont St. Vrain Rotary Club, and in his free time enjoys training for and racing triathlons.
**Medical Advance Directives**

Speaker: Brandon Fields, *Brandon Fields, P.C.*
Room: L130

Description: A review of the legal documentation used in Colorado to express your wishes for medical care in the event you cannot make your own decisions, including: the health care power of attorney, HIPAA authorization, living will, MOST (Medical Order for Scope of Treatment) Form, and CPR Directive. We will also review the 2016 Colorado End-of-Life Options Act, what it includes, and how it differs from the use of advance directives.

Speaker Bio: Brandon Fields, Esq. is in private practice in Boulder, specializing in elder law, estate planning, probate, protective proceedings, and long-term care and special needs planning. He has practiced law over 30 years, starting in New York City and subsequently in Colorado. Mr. Fields is an active member of the National Academy of Elder Law Attorneys and the Elder Law Section of the Colorado Bar Association (CBA). He is a regular speaker for the Alzheimer’s Association, the CBA Elder law section, Boulder County Senior Law Day, and is a guest lecturer at a gerontology program at the University of Colorado.

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**Stay Ahead of Scams and Fraud, 2019**

Speaker: Lizbeth Parker, *Community Protection Division, Boulder County District Attorney’s Office*
Room: 200

Description: Scammers are getting increasingly sophisticated in their attempts to get your money or personal information. Learn about the types of frauds and scams we are hearing about most often in the District Attorney’s office, how to recognize them, and about the technologies and devices that can help stop unwanted calls from coming your way. Walk away knowing how to protect yourself from fraud on the phone, online, and in person.

Speaker Bio: Lizbeth Parker is the Community Protection Division Specialist in the Boulder County District Attorney’s office. She routinely handles consumer complaints and reports of fraud and financial exploitation of older adults in our community and provides education and outreach on a number of subjects in an effort to help prevent all of our community members from becoming victims of crime.

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**Special Needs Planning**

Speaker: Amy Wagner Kho, *Germany Law Firm*
Room: Board Room

Description: Special needs planning works to preserve public benefits for the disabled child or person while supplementing and enhancing the quality of their life. While planning considerations vary depending upon age, competency, and other family considerations, the goal is always to use the estate to enrich and improve their life while maintaining enrollment in public benefits programs. These goals can be met through the use of a properly prepared special needs trust. Special needs estate planning can safeguard the portion of the parents’ estate which passes to their special needs child at the time of their death.

Speaker Bio: Ms. Kho is licensed in Colorado and Idaho. She has practiced in the areas of real estate, natural resource law, and local government law, in addition to elder law, probate, and estate planning. Ms. Kho joined the Germany Law Firm in March 2017. Her interest in estate planning is rooted in her childhood spent on her parent’s Oregon cattle ranch, where she saw many families ripped apart because no will or estate plan had been put in place. Her passion is to help families create estate plans to respectfully ease the transfer of assets after death.
Title: Honoring Your Values at End of Life – 
Guidance for Meaningful Advance Care Planning
Speaker: Grant Marylander, Palliative Care Chaplain/Care Coordinator, Boulder Community Health
Room: Levin Hall
Description: Over half of us will not be able to express our choices regarding health care near the end of our lives. Too often our values and preferences are not understood or followed by the people making medical decisions for us even when there are Advance Directives, such as living wills, in place. Grant will share experiences and strategies about how to ensure your goals of care are followed, so you can have the end of life experience you choose.
Speaker Bio: Grant Marylander is a Palliative Care Chaplain/Care Coordinator for Boulder Community Health where he helps patients and families identify and express goals of care when confronting serious and terminal illnesses. He is also a lawyer with The Marylander Firm LLC where his practice includes estate and advance care planning.

Title: Estate Planning: The Basics
Speaker: Pete Rogers, Esq., Peter Rogers Family Law
Room: L130
Description: This session will address the basic questions: Why do you need a will and how do you write one? What is probate, and how do you avoid it? Will there be taxes due on my estate? What is a power of attorney and how do you use one?
Speaker Bio: Peter Rogers has been practicing law in Boulder County and along the Front Range since 1970. His practice emphasizes family law, including adoptions, child custody, dissolution of marriage, wills, and estate planning. He is a member of the Family Law sections of the Boulder County Bar Association and the Colorado Bar Association.

Title: Social Security Q&A
Speakers: Christina Ebner & Betty Wyatt
Room: Board Room
Description: Christina & Betty will make brief statements about Social Security before answering questions from the audience.
Speaker Bios: Christina Ebner has spent thirty years practicing Social Security law, advocating for clients at disability hearings, and going to personal conferences with clients for over-payment and other issues. Betty Wyatt is a retired Social Security worker with forty years of experience at the Social Security Administration.

Title: Nontraditional Estate Planning
Speaker: Sara Bucar, Brestel Bucar, Ltd.
Room: 200
Description: Nontraditional estate planning involves unique concerns and considerations. Whether you have a blended family, have no children, choose to not leave assets to your children, or are in a committed relationship but not married, it is important to be aware of common pitfalls and to plan appropriately to ensure that your wishes are fulfilled. We will touch on these scenarios and some possible solutions to consider.
Speaker Bio: Sara Bucar is a founding partner at Brestel Bucar, Ltd. Her practice focuses on estate planning, estate and trust administration, guardianships and conservatorships, and premarital and marital agreements. Sara earned her JD from the University of Colorado School of Law and is active in the Trust and Estate and Elder Law Sections of the Colorado Bar Association.
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