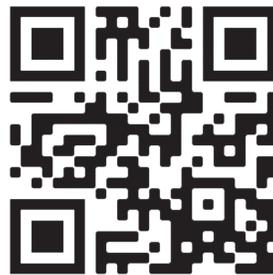




EVENT PROGRAM



SEPTEMBER 24, 2022

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 evaluation form and pick up Senior Law Handbook

2022 BOULDER COUNTY SENIOR LAW DAY PLANNING COMMITTEE

- Diedre Braverman
with *Braverman Law Group*
- Erica Corson
with *Boulder County Area Agency on Aging*
- Desiree Firle
with *Twentieth Judicial District Attorney's Office*
- Maia Labrie
with *Law Office of Sarah Pheral, LLC*
- Brett E. Landis
with *Colorado Legal Services, Boulder Office*
- Lizbeth Parker
with *Boulder County Area Agency on Aging*
- Peter Rogers
with *Peter Rogers Family Law*
- Sarah Pheral
with *Law Office of Sarah Pheral, LLC*

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

15 minute Ask-A-Lawyer conferences run from 9:00 am until 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.

2021 COLORADO SENIOR LAW HANDBOOKS may be picked up as you leave the event.

THANK YOU 2022 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.

Platinum	 FRASIER	 Boulder COUNTY BAR ASSOCIATION	 LAW OFFICE OF SARAH PHERAL, LLC
Gold	 Braverman LAW GROUP <small>ACTION EXPRESSES PRIORITIES</small>		
Silver	Assisted Living Locators Jan D. Somers LCSW Dietze and Davis, P.C.		
Bronze	Kingsbery, Johnson & Love, LLP		
In-Kind	 50 Plus Marketplace	 AREA AGENCY ON AGING <small>Community Services Department</small>	 CPD community protection division
	MASON DESIGN		

KEYNOTE ADDRESS 9:00 am

- Title:** *Abuse Later in Life: Prevention Strategies and Our Response to Crimes Against Older People*
- Speaker:** Michael Dougherty
- Room:** Levin Hall
- Description:** **Abuse Later in Life** — Elder abuse is an injustice with serious consequences for our victims and community. These cases are a priority for the District Attorney's Office. Elder abuse impacts our victims, as well as the community's health, safety and economic welfare. As the pandemic has illustrated, there are too many scams being perpetrated against our older population — particularly with computer devices and phones. In this presentation, 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 serve our community and our elder population. Safety tips will be included.
- Speaker Bio:** Michael Dougherty is honored to be the 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 started his career as a prosecutor with the Manhattan District Attorney's Office. He currently serves as the President of the Colorado District Attorneys' Council. He is the proud father of 14-year-old twins.

SESSION 1 10:00 am

- Title:** *Estate Planning: What Do I Need? Is a Trust Right For Me?*
- Speaker:** Diedre Braverman
- Room:** Levin Hall
- Description:** Join friendly and experienced estate planning lawyer, Diedre Braverman, to explore:
1. What documents you need to know that you will be protected and provided for if you become incapacitated, and
 2. How to ensure your assets are given to the right people in the best way possible after you're gone.
- We'll touch on each necessary document and discuss the benefits of a trust in the right situation.
- Speaker Bio:** Diedre Braverman has been working with individuals and families to plan their estates for over 20 years. For Diedre, estate planning is the process of turning her client's values and goals into plans that are firm yet flexible. A graduate of Stanford Law School and UC Irvine, Diedre loves living and working in Boulder. She is a frequent speaker, educating other estate planning attorneys nationally and community members locally.
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Title: *Advance Directives Are Not Enough — Navigating Serious Illness at End of Life*

Speaker: Grant Marylander

Room: 130

Description: At some point in our lives, nearly all of us will confront a serious illness for ourselves or a loved one. In that moment, it is often challenging to understand prognosis and how to align our personal values with treatment options. This presentation will offer guidance on some of the most common, but often challenging, issues surrounding serious illness including CPR, feeding tubes, mechanical ventilation, and hospice as a treatment option.

Speaker Bio: Grant retired from law after 35 years to pursue work in hospice and palliative care. He currently serves as the palliative care coordinator at Boulder Community Health where he has led more than 3,000 patient meetings concerning serious illness, goals of care, and end of life planning. He is a social worker, board-certified chaplain, and certified grief counselor.

Title: *Income in Retirement*

Speaker: Brandon Fields & Dan Yerger

Room: Fitness Room

Description: Certified Financial Planner Daniel Yerger and Elder Law Attorney Brandon Fields present on retirement income planning. You will come away:

- How to use the assets you've built up to live on in retirement
- How to manage the taxes in your portfolio
- The impact of estate planning tools such as Wills and Trusts on Retirement Income
- How to use Medicaid in Retirement

Speaker Bios: Brandon Fields is an elder law and estate planning attorney in private practice in Boulder, Colorado. His practice is focused on the legal needs of seniors, estate planning for all ages and trusts for the disabled.

He has a B.A. from Brandeis University and received his law degree from George Washington University. He is an active member of the National Academy of Elder Law Attorneys and is a past chair of the Colorado Bar Association Elder Law Section.

Brandon is a past board member of the board of Golden West Foundation, Boulder Jewish Elder Housing and a past Chairman of the Board of the People's Clinic, Boulder's community health center.

Brandon lives in Boulder with his wife Kristin, a speech therapist, and they have three daughters.

Daniel Yerger, MBA, CFP®, ChFC, AIF, CDFA, is a Certified Financial Planner in Longmont, CO. He was recognized as an Investopedia 100 Top Financial Advisor in 2021 and teaches Retirement and Investment Planning at CU Boulder. Daniel is also a Ph.D. Candidate in Financial Planning, and the owner of MY Wealth Planners®, the only fee-only financial planning firm in Longmont, CO.

Title: *Protecting Yourself from Scams & Fraud*

Speaker: Desiree Firle

Room: Levin Hall

Description: Older adults are often targeted by individuals trying to get access to their money and personal information. Since 2020, scammers have increased the various ways they are attempting this through romance scams, money mule jobs, and imposter schemes. This presentation will provide an overview of the frauds and scams we hear about most often in the District Attorney's Office and will offer resources to help prevent older adults from falling victim to phone, online, and in-person scams.

Speaker Bio: Desiree Firle is the Community Protection Specialist with the Boulder County District Attorney's Office. Within the DA's Community Protection Division, Desiree focuses on such topics as consumer protection, resolving issues between consumers and businesses, and engaging and educating the community regarding scams, fraud, and identity theft. Desiree has an MSW from the University of Denver with an emphasis on organizational leadership and policy and a BA from the University of Arizona in Religious Studies.

Title: *Serving as Fiduciary, Medical or Financial Agent Roles, Responsibilities, Pitfalls*

Speaker: Ashley Geary

Room: 130

Description: An overview of the various fiduciary roles with a focus on serving as an agent under a power of attorney, either medical or financial, and a court-appointed guardian or conservator. The presentation will discuss the difference between an agent under a power of attorney and a guardian or conservator, the responsibilities of these fiduciaries, best practices, and common pitfalls.

Speaker Bio: Ashley Geary is a shareholder at Jorgensen, Brownell & Pepin, P.C. where she practices in the areas of elder law, estate planning, probate and Medicaid. Prior to joining Jorgensen, Brownell & Pepin, Ashley clerked in Denver District Court for the honorable Judge Mullins (ret) and the honorable Judge Grant.

Title: *Protection From Creditors/Asset Protection*

Speaker: Matt Forstie & Mary Green

Room: Fitness Room

Description: This session will include discussion about consumer rights, particularly in the context of dealing with debts. Topics include how to access and understand your credit report, dealing with creditors and debt collectors, prioritizing debts, dealing with lawsuits, basics about the bankruptcy process, and resources to help community members deal with consumer issues. The session will be co-presented by an attorney at Colorado Legal Services and a personal finance specialist with Boulder County's Personal Finance Program.

Speaker Bios: Matt is an attorney at Colorado Legal Services. Colorado Legal Services is a legal aid non-profit that provides representation to low-income families and seniors in civil matters. Matt's practice focuses on consumer protection and housing issues.

Mary Green is a HUD-Certified Housing Counselor and Personal Finance Specialist. Mary leads the Bank On Boulder County coalition, promoting increased access to banking for all. She has 5 years experience financial coaching and nearly 10 years of experience in the social services field. Mary relocated from her native Kansas to Colorado in 2015 to volunteer in Americorps where she served for 2 years building capacity in local affordable housing.

Title: *Long Term Care Medicaid: Preparing Yourself and Loved Ones*

Speaker: John Estes

Room: Levin Hall

Description: This presentation will cover Long Term Care Medicaid. It will primarily focus on eligibility criteria, coverage, and common pitfalls that individuals and families make when applying for this program.

Speaker Bio: John is a partner with Kapsak | Estes LLC in Longmont. His practice focuses primarily on Estate Planning and Estate Administration, including wills, trusts, and powers of attorney, as well as Elder Law, Guardianships and Conservatorships, and Medicaid planning. When not in the office, John enjoys training for and racing triathlons and reading.

Title: *Estate Planning: The Basics*

Speaker: Pete Rogers

Room: 130

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: Pete has practiced family law in Colorado since 1970. A significant portion of his practice is preparation of wills and powers of attorney, as well as counselling and representing persons opening and administering estates for deceased Colorado residents.

Title: *How to Pick a Lawyer: Tips and Resources For Trying To Figure Out the Right Attorney-Client Fit*

Speaker: Brett Landis

Room: Fitness Room

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 Colorado Legal Services, Boulder Office. She received her BA from Carleton College and her J.D. 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, CO. She serves on the Access to Justice committees and is a Past President of the Boulder County Bar Association.
