



BOULDER COUNTY

Senior Law Day

www.bocoseniorlawday.org

EVENT PROGRAM

SEPTEMBER 30, 2023

TODAY'S EVENTS AT A GLANCE

TIME	LOCATION	EVENT
8:00 am	Atrium	Doors and Sponsor Exhibits Open Ask-a-Lawyer Sign-Up Begins Continental Breakfast
9:00 am – noon	Rooms B, G, F	Ask-a-Lawyer Consultations
9:00 – 9:50 am	Gymnasium	Keynote Address: Community Safety and Wellbeing
10:00 – 10:50 am		
Session 1:	Gymnasium	Revocable Living Trusts, Wills & Beyond: Trust Us, There's More!
	Room D & E	Protecting Yourself from Scams & Fraud
	Room A	Strengthening Supports: Addressing Financial Exploitation, Neglect, and Abuse in Later Life
11:00 - 11:50 am		
Session 2:	Gymnasium	Serving as a Fiduciary, Medical or Financial Agent: Roles, Responsibilities, Pitfalls
	Room D & E	The Rights Stuff: What is Going On with the Landlord/Tenant Relationship in Colorado?
	Room A	How to Pick a Lawyer: Tips and Resources for Trying to Figure Out the Right Attorney- Client Fit
12:00 – 12:50 pm		
Session 3:	Gymnasium	Estate Planning for Peace of Mind
	Room D & E	It's Not Rude to be Shrewd!
	Room A	Long-Term Care Medicaid: Learning the Basics and Avoiding Common Pitfalls
As you leave	Atrium	Hand in Evaluation form Pick up 2023 Colorado Senior Law Handbook

LONGMONT SENIOR CENTER



KEYNOTE and SESSION 1-3 PRESENTATIONS: Gymnasium, Room D & E, Room A.

ASK-A-LAWYER: 9:00 am until noon by appointment only.

Sign up for an appointment in the Atrium; first come, first served.

If there are no available sessions, please check back throughout the day, as a session may open up.

The 15-minute consultations take place in Rooms B, G, and F.

SPONSOR EXHIBIT TABLES are in the Atrium. Please take time to visit with the businesses and organizations that generously sponsor and support our event.

2023 COLORADO SENIOR LAW HANDBOOKS may be picked up in the Atrium as you leave. You can also access the Handbook here:

Don't forget to complete and hand in your Evaluation form as you leave! **THANK YOU** for attending Senior Law Day 2023!



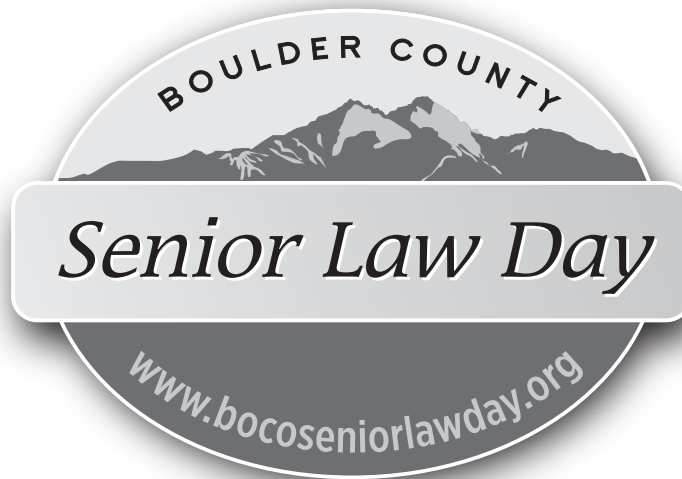
Title: *Community Safety and Wellbeing*

Speaker: Michael T. Dougherty

Room: Gymnasium

Description: The rise in crime, particularly during the pandemic, caused concerns in communities throughout Colorado and across the nation. The rise in criminal activity, also, made clear that mental illness, drug addiction and homelessness are three major issues that must be addressed. This presentation will include data and analysis around recent crime trends, including elder abuse. We will discuss the steps that we can take in Boulder County and the work of the District Attorney's Office to ensure a safe community for all, including our older community members.

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 from Brooklyn in 2010 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 is the proud father of 15-year-old twins and is an adjunct professor at CU Law School.



SESSION 1 PRESENTATIONS 10:00 am

- Title:** *Revocable Living Trusts, Wills & Beyond: Trust Us, There's More!*
- Speaker:** Diedre Wachbrit Braverman
- Room:** Gymnasium
- Description:** Dive into estate planning and discover the differences between will-based plans and trust-based plans. Learn about important trust types and their varied purposes. Get up to date on other essential estate planning documents. This lively interactive session, led by our own enthusiastic Senior Law Day Planning Committee Chair, Diedre Braverman, invites your pressing questions. Experience a mix of fun and wisdom and get insights for your own robust estate plan. Trust us, it's a must attend!
- Speaker Bio:** Diedre is a Stanford Law grad with a flair for Latin and Greek from UC Irvine, and has been mastering estate planning for over two decades. She's not only taught hundreds of attorneys (and married one she met at a conference!), but she's also speaking at Senior Law Day for the second year and rocking the role of Chair for the Senior Law Day Planning Committee for today's conference. Prepare for legal insights with a classical twist!
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- Title:** *Protecting Yourself from Scams & Fraud*
- Speaker:** Desiree Firle
- Room:** D & E
- Description:** We've all experienced seeing that unfamiliar phone number that we answer, only to have an automated voice tell us about our "extended car warranty", but did you know that this is just one of hundreds of scams that target consumers to try to get access to your money and personal information? Join the District Attorney's Community Protection Division as we explore the world of frauds and scams, and hear about the most common scams and about how to prevent becoming a victim.
- Speaker Bio:** Desiree is the Community Protection Specialist with the Boulder County District Attorney's Office, focusing 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.
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- Title:** *Strengthening Supports:
Addressing Financial Exploitation, Neglect, and Abuse in Later Life*
- Speaker:** Lizbeth Parker
- Room:** A
- Description:** We all have a right to dignity, safety, and security as we age. Join the Boulder County Justice Coalition for ALL (Abuse in Later Life) to learn how we can all support older adults who may experience financial exploitation, neglect, or abuse. Attendees will gain a better understanding of what these harmful behaviors are, learn how to recognize and respond to warning signs, and talk about how to seek support and advocacy to advance safety, security, and justice for older adults in our community.
- Speaker Bio:** Liz works at the Area Agency on Aging as the Coordinator of Boulder County's federal Abuse in Later Life grant, awarded by the U.S. Department of Justice Office on Violence Against Women. She coordinates training and outreach efforts among law enforcement, the judiciary, agencies serving older adults, and throughout the community. Liz has also worked as the Community Protection Specialist with the Boulder County District Attorney's Office, and practiced law for over 20 years, working on complex commercial litigation, federal securities fraud, and employment matters.

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

Speaker: Ashley A. Geary

Room: Gymnasium

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 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 in civil and domestic divisions.

Title: *The Rights Stuff: What is Going on with the Landlord/Tenant Relationship in Colorado Lately?*

Speaker: Susan Spaulding

Room: D & E

Description: Lately, Colorado's legislature has passed laws giving tenants more rights in a wide variety of ways: requiring longer notice for evictions, requiring mediation before evictions, protecting tenants from uninhabitable conditions, and more. As a tenant, are you aware of your new rights — as well as your responsibilities? As a landlord, are you aware of your new responsibilities — as well as your rights? You might be surprised about what the legislature has been up to.

Speaker Bio: Susan has been with City of Longmont for 16 years: she coordinates Longmont Mediation Services and founded and continues to organize Longmont's monthly Landlord Tenant Training Alliance. She has been mediating in eviction court each Friday since 2004. She is most interested in helping landlords and tenants resolve differences without eviction. Susan graduated from CU Law and has a Masters of Professional Studies, Alternative Dispute Resolution, from DU. After law school, she practiced law in small firm in Broomfield and clerked for a 20th Judicial District judge.

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

Speaker: Brett Landis

Room: A

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 do 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 community resources that may be helpful in the attorney search.

Speaker Bio: Brett is the Managing Attorney of Colorado Legal Services - Boulder. 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 committee and is a Past President of the Boulder County Bar Association.

Title: *Estate Planning for Peace of Mind*

Speaker: Laura S. Moore

Room: Gymnasium

Description: This presentation will cover the key estate planning documents, including Last Will and Testament, medical and financial powers of attorney, advanced directives (living will), and beneficiary deeds. Yes, you can plan for your pets! When do you need a revocable living trust and how do you fund it? Let's talk about the differences between Personal Representatives and Trustees, and how to select the best person for the job.

Speaker Bio: Laura has practiced law in Colorado since 1993, a graduate of the University of Colorado (B.A. in English), and the Willamette University College of Law in Salem, Oregon. She joined the law firm of Warren, Carlson & Moore, LLP in October 2011. Her practice focuses on estate planning, elder law issues and probate. Laura is a member of the Bar Association's Tax, Estate Planning and Probate Committee and a former Co-Chair.

Title: *It's Not Rude to be Shrewd!*

Speaker: Maggie Benton

Room: D & E

Description: Medicare is a big business, and Medicare Fraud at nearly \$70 BILLION annually impacts us all — both now and in the future. This should be a lively discussion and will aid in learning how to spot fraud, how to respond to suspicious calls and emails, sales agents' do's and don'ts, and several other areas to help make you a savvy Medicare consumer.

Speaker Bio: Maggie has been involved with Medicare since 2012 — first in sales and since 2017 as an advocate for the consumer as a Certified SHIP counselor at the Boulder County Area Agency on Aging. Her goal is to empower and educate consumers on Medicare.

Title: *Long-Term Care Medicaid:
Learning the Basics and Avoiding Common Pitfalls*

Speaker: John M. Estes

Room: A

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, Colorado, 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 is a proud member of Niwot Rotary. In his free time enjoys training for and racing triathlons.

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Thank you for attending Senior Law Day 2023!

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