

# MANAGING OTHER PEOPLE'S MONEY

*I'M Legally Responsible: Now What!*

OSHER Life Long Learning Institute

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Connie Bourne, Esq., Presenter

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- I. **Fiduciary**
- II. **Agent - Power of Attorney**
- III. **Agent - Advanced Medical Directive**
- IV. **Life & Estate Protection Techniques**
- V. **Case Scenario: Mary & George**
- VI. **Case Scenario: Maureen**
- VII. **Case Scenario: Pink Hat and White Gloves**