MANAGING OTHER PEOPLE’S MONEY

I’M Legally Responsible: Now What!

OSHER Life Long Learning Institute
January 22, 2013

Connie Bourne, Esq., Presenter

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