Estate Planning Council of North Texas

P. O. Box 38553, Dallas, Texas 75238-8553 Tel: 214-340-8020 E-mail: northtexasepc@yahoo.com
Website: www.epcnt.org

BREAKFAST MEETING

WEDNESDAY, NOVEMBER 20, 2019

(Breakfast served 7:30-8:00 a.m., Program 8:00-9:00)

NOTE: MEETING LOCATION

GLENEAGLES COUNTRY CLUB (5401 West Park Blvd., Plano)

RESERVATION DEADLINE: WEDNESDAY, NOVEMBER 13, 5:00 p.m.

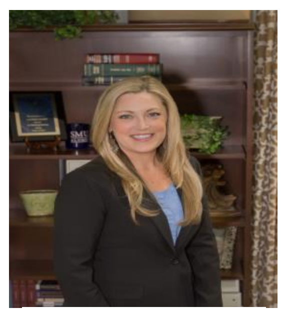
(PAYMENT MUST BE IN COUNCIL'S OFFICE BY WEDNESDAY, NOVEMBER 13)

TECHNIQUES FOR DEALING WITH CLIENTS WHO ARE NOT QUITE INCAPACITATED
By Accountable Aging, Inc. and Leu & Peirce PLLC

MARY KOFFEND

LORI LEU

MICK KOFFEND



ERIN PEIRCE

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As a professional you will have to deal clients who are not quite incapacitated. There are several forms of incapacity and they are not necessarily age driven although senior adults are more likely to be headed in that direction. In this presentation forms of incapacity will be defined; the characteristics and possible implications for the professional of each will be provided. With clients who are not quite incapacitated there are risks – risks of acting and risks of not acting. This topic will be presented in a Question/Answer Interactive Format between the panel members consisting of Care Managers from Accountable Aging and Elder Law Attorneys from Leu & Peirce. The premise of the presentation is provide insight to professionals on how to interact with clients at the beginning stages of cognitive impairment. We will review and discuss worst case scenarios and what happens when your plan falls apart or when you fail to plan. The goal is to provide professionals information to issue spot various cognitive issues and provide talking points regarding dementia, long-term care and planning, so that they can better serve their aging clients and loved ones. **Mary Koffend** co-founded Accountable Aging Care Management and currently serves as an advisor to the company's day-to-day management. Mary brings many years of management experience, problem solving, and dealing with situations where there seems no simple solution. Mary also brings her life experiences as a daughter of a mom with Alzheimer's and an aunt with schizophrenia. Mary was responsible for Houston's largest and most complex Social Security Administration client service operation before managing the Medicaid provider services programs for the State of Texas. Mary is trained in family facilitation and mediation. Mary can frequently be found serving her community and Texas organizations as a guest speaker on many topics relating to aging and disability. **Mick Koffend** co-founded Accountable Aging, but began his career in a very different arena. After graduating from college Mick joined the U.S. Navy and as a Naval Flight Officer, he earned his daily bread for about five years by being shot off an aircraft carrier. After the Navy, he went to Harvard Business School, and then started a career in Big Oil. Mick has followed a path where he has been a Controller or Chief Financial Officer of several small companies, many of them start-ups and all of them in the technology sector. **Lori A. Leu** is a Certified Elder Law Attorney with Leu & Peirce, PLLC, based in Plano and serving the North Texas area. Lori graduated from Kansas State University, summa cum laude, with an honors degree in Interdisciplinary Social Sciences. She then graduated with a law degree from Harvard Law School. After practicing in the areas of commercial litigation and telecommunications for more than 20 years, and attending seminary at SMU's Perkins School of Theology, Lori transitioned to a practice focused exclusively on elder law. Lori's elder law practice focuses on all legal issues affecting seniors and long-term care planning, including financing of long-term care, Medicaid planning, VA pension benefits, estate planning, contested guardianships, and contested probate. **Erin W. Peirce** is an Elder Law Attorney with Leu & Peirce, PLLC, based in Plano and serving the North Texas area. Erin is a graduate from Texas A&M University. After college, Erin became a certified paralegal and worked in defense litigation. Erin graduated with a law degree from South Texas College of Law in Houston. She went on to practice commercial litigation, until she joined Lori Leu in 2011 to focus exclusively on elder law. In 2015, Erin became a partner at Leu & Peirce, PLLC and committed to focusing on legal issues affecting seniors and long-term care planning, including financing of long-term care, Medicaid planning, VA pension benefits, estate planning, contested guardianships, and contested probate.

Continuing education credits pending for State Bar, CPA, CFP

Membership dues do not include meals. **Credit Cards are now accepted online at the website, www.epcnt.org**
Members who have already paid in advance for all meetings for the year **MUST** REGISTER ON THE WEBSITE (www.epcnt.org) so we will have a count for the number of meals to prepare.

THERE WLL BE 5 MEALS AVAILABLE FOR WALK-INS ON DAY OF MEETING (FIRST COME, FIRST SERVE). ALL OTHER WALK-INS WILL BE "PROGRAM ONLY". **NOTE: WALK-IN PRICES ON DATE OF MEETING: Member: $30 (includes meal); Guest: $35 (includes meal); Program Only (no meal): $20**

To mail a check, please complete this form, enclose a check (payable to Estate Planning Council of North Texas) and mail to: Estate Planning Council of North Texas, P. O. Box 38553, Dallas, TX 75238-8553.

Member: $25 (includes meal); Guest: $30 (includes meal); Program Only (no meal): $15

Name: ____ ____$25 ___$30 ____$15
E-Mail: _______________________________________
Phone Number: _________________________________

We would like to thank the following Sponsors for their support for 2019-2020: American Cancer Society, Armanino, Bank of Texas, Communities Foundation of Texas, Frost Bank, Glast Phillips & Murray, Leu & Peirce, Lee Financial Corporation, Lindquist Eisenberg LLP, North Dallas Bank & Trust, PlainsCapital Bank, Merrill Lynch (The Maynard Group), Regions Bank, Texas Bank & Trust, The Catholic Foundation and Value, Inc.