



# East Bay Council News

October 2007

## President's Message

At our September meeting we received information and advice from two attorneys who know the risks real estate assets pose for professional fiduciaries. The focus was on the assets.

Our October meeting will shift the focus to the elder individual as they approach the need for intervening care. It's not the glamorous aspect many see in estate planning dedicated to enhancing the fortunes of clients and their beneficiaries. It's just the up close and personal part of dealing with the daily reality of those who live long enough to once again in life approach dependency.

When you can no longer do it all for yourself, or when others want to do it to you, not for you, who are you going to turn to? Not Ghostbusters. We are fortunate to have within our ranks a number of care managers, including Roger Cormier, whose business it is to know what to do when intervention becomes necessary.

Is this the sort of essential knowledge that you must command in order to perform your services as a member of the estate planning professional community? If your clients only want to talk about numbers and documents, you may still need to spot incapacities, dependencies, and undue influences, in order to properly serve your function. (see next column)

## "Elder Care Collaboration... What is Your Role?" A Panel Discussion

Are you the trusted advisor of an elderly client? Do you have an aging family member? Regardless of why you are attracted to estate planning, your clients, family and friends may rely upon you for sound advice and consider you a resource when care-related issues become overwhelming. In order to ensure that they, or you, plan for and receive the best care possible, you ought to have an understanding of both the private and public side of elder care in our community and how the players can work together.

Our October meeting features a panel of professionals who will investigate the premise that improved elder care results can be

attained through collaboration among allied professionals. Geriatric Care Manager **Roger Cormier** of the Cohen Cormier Group, a professional elder care advisory company that assists families struggling with the care-giving decisions for a family member will join **Karen Patterson**, a social worker with Adult Protective Services in Alameda County, who will share her perspective from the public side of elder care, and **Connie Rutherford**, Deputy County Council and Financial Abuse Specialist Team Coordinator, who will provide insight on the legal enforcement of elder care protections. Our EBEPCC President, **Tim Smallsreed** will moderate.

Join us on **November 12th!**  
For a

**Capital Market and  
Economic Update**  
From Bernstein

[www.ebepc.org](http://www.ebepc.org)

**Monday, October 8, 2007**

**Scott's Seafood Restaurant**

Jack London Square  
Oakland

6:00 PM Wine Reception

6:30 PM Dinner Meeting

\$35.00 paid in advance  
\$40.00 at the door

Please make your check payable to  
"EBEPC" and mail to Bonni in the  
enclosed return envelope before  
Thursday, October 4th  
or call 925.686.4819

**Meeting Sponsored By:**

**Kelly Johnston**

**The Mechanics Bank**

**1999 Harrison Street, Ste. 810**

**Oakland, CA**

**510.419.3911**

Prepare to learn some of what you'll need to know if you plan to serve clients who age at the same average pace that we do. Now what does that say about us? Naw...they're all much older.  
-Tim Smallsreed