

# NATIONAL ACADEMY of ELDER LAW ATTORNEYS



**BOSTON MARRIOTT NEWTON**  
2345 Commonwealth Ave.  
Newton, MA 02466

## MASSACHUSETTS CHAPTER - MEETING NOTICE

**Wednesday, May 25, 2016**

**5:30 PM – Reception - 6:00 PM - Dinner Meeting**

### **Financial Exploitation**

#### **Spotting the Signs, Developing Strategies, and How to Represent your Client**

Financial exploitation is a growing form of abuse for seniors and adults with disabilities. It is essential that attorneys who practice in the estate planning and elder law fields be familiar with the signs of exploitation. It is critical that attorneys know their responsibilities in representing their client and that they do not become unwitting partners to the abuse. This program will discuss the red flags that may be a sign of exploitation, provide practice tips for gathering information from clients and assessing capacity, and discuss drafting tips for estate planning documents. Our speakers have experience dealing with the issue of financial exploitation from different perspectives and will discuss the role of elder protective services, options for intervention, and recovery in both Probate Court and Superior Court.

### **SPEAKERS**



**Lawrence K. Glick, Esq.**

Lawrie Glick is an attorney engaged in private practice in Needham, MA. He is a graduate of the University of Wisconsin-Madison and Boston College Law School, and has been in private practice for over 30 years. Prior to his entering private practice, he was a law clerk to the Chief Justice of the Massachusetts Appeals Court, a criminal trial lawyer for the Roxbury Defenders Committee and a full-time Associate Professor at Boston College Law School for three years, teaching primarily in its clinical legal services program. Attorney Glick concentrates his practice primarily in the areas of elder law litigation (particularly as it relates to guardianship, conservatorship and elder protective services) and probate litigation. He is a member of the Massachusetts Bar Association Probate Law Section, and the Greater Boston Fiduciary Law American Inn of Court.



**Sarah Peterson, Esq.**

Sarah Peterson practices elder law, mental health law, estate planning and probate litigation with Zalkin Law Firm, PC in South Natick. She has many years of experience advocating for seniors and their families, both as an attorney and in social services prior to attending law school. Attorney Peterson is licensed to practice in Maine and Massachusetts, having started her legal career with Maine's Legal Services for the Elderly concentrating much of her practice there on financial exploitation and predatory lending cases. She was a founding member of the Lewiston-Auburn Elder Abuse Task Force, and is a frequent speaker on the topics of financial exploitation, guardianship, and conservatorship law. Attorney Peterson is currently serving as president of the Massachusetts Guardianship Association.



**India Minchoff, Esq.**

India L. Minchoff is a graduate of Suffolk University Law School. Upon her graduation she started her own firm in Boston. Attorney Minchoff practices primarily civil litigation with an emphasis on jury trials involving undue influence and breach of fiduciary duty litigation. Attorney Minchoff has secured three multimillion dollar verdicts which have generated news coverage in Boston television and in other various news outlets. Attorney Minchoff also regularly briefs and argues appeals before the Massachusetts Appellate Courts.

**NOTICE TO BOARD OF DIRECTORS AND COMMITTEES**

The following meetings will be held at the **Boston Marriott Newton Hotel** prior to the Dinner Meeting. Please check the hotel schedule of events for meeting locations.

MassNAELA Board of Directors                    1:00 – 2:30 pm  
 MassNAELA Litigation Committee            2:30 - 4:00 pm  
 MassNAELA Public Policy Committee        4:00 – 5:30 pm

**For More Information: Call Barbara Cohen at (617) 566-5640**

- **REGISTER ONLINE NOW AT [www.MassNAELA.com](http://www.MassNAELA.com) or**
- **Send this Registration Form by email to [CompuWord@aol.com](mailto:CompuWord@aol.com) or fax to (617) 734-9758 or**
- **Send by US Mail to: MassNAELA, P.O. Box 67137, Chestnut Hill, MA 02467**

MassNAELA Members may be accompanied by non-attorney employees, attorney guests, and law students. Attorney guests may attend up to two meetings before deciding to become a member. If you are not a member of National NAELA and the Massachusetts Chapter, and are a licensed attorney or law student, consider joining now. For membership information, visit our website [www.MassNAELA.com](http://www.MassNAELA.com) and click on “Become a Member.”

**Please photocopy and submit a separate form for each registrant.**

Please Check One:

<input type="checkbox"/> MassNAELA Member <input type="checkbox"/> Attorney Guest	<input type="checkbox"/> MassNAELA Member Non-Attorney Employee	<input type="checkbox"/> Law Student
<b>\$65.00</b> if paid and postmarked no later than <b>May 18, 2016</b> <b>\$75.00</b> for reservations postmarked after <b>May 18, 2016</b>	<b>\$90.00</b> if paid and postmarked no later than <b>May 18, 2016</b> <b>\$100.00</b> for reservations postmarked after <b>May 18, 2016</b>	<b>NO CHARGE</b>

**\* Represents required information to enable the Chapter to submit adequate information to the credit card companies, which will result in the Chapter being charged lower transaction fees.**

NAME of REGISTRANT: \* \_\_\_\_\_ FIRM NAME: \_\_\_\_\_

IF GUEST, NAME of MEMBER ATTORNEY: \* \_\_\_\_\_

ADDRESS (including ZIP CODE): \* \_\_\_\_\_

PHONE: (    ) \_\_\_\_\_ E-MAIL ADDRESS: \_\_\_\_\_

- I would like to arrange for a special meal - Please call the office (617-566-5640) at least 2 days prior to meeting.
- Payments by check (*please enclose check and mail to the address above*)
- Payments by credit card (*please provide ALL of the information requested below*). Payment by credit card may be faxed to (617) 734-9758, or mailed, or paid online on our website.

I authorize the Massachusetts Chapter of the National Academy of Elder Law Attorneys to charge my credit card as follows: Amount: \$\_\_\_\_\_ Credit Card Type  Amex  MasterCard  VISA

Exp. Date\* \_\_\_\_\_

Account Number: \* \_\_\_\_\_ Signature: (Required): \* \_\_\_\_\_

To guarantee your seating you must pre-pay at least 4 business days before the meeting. No refunds will be allowed if requested less than 4 business days prior to the meeting. Refunds are subject to a \$10.00 handling fee.