

On-Demand

2023

Webinar

Dealing with Powers of Attorney

Originally presented on
July 25, 2023
(1.5 hour program)

Presented by
Keith R. Forrester, Principal
Aldrich & Bonnefin, PLC



WHO SHOULD ATTEND?

New accounts personnel, In-house counsel, Operations Administration, Credit administration, Note department staff

Presented by Counsel for Bankers' Compliance Group®
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There are a number of laws governing powers of attorney which can make determining whether to accept any given power of attorney difficult. One of the main concerns is the extent of the rights of financial institutions when it comes to relying on a power of attorney. Further complicating matters, a lack of clarity in the specific terms of a power of attorney can raise concerns over whether an attorney-in-fact is authorized to access the principal's financial accounts.

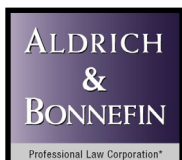
During this Webinar we will examine the protections afforded a financial institution when accepting a power of attorney that is covered by the California Power of Attorney Law. We will even address whether an institution can accept a copy of a power of attorney if the original is not available. Also, what if there are concerns over whether the principal is incapacitated, yet the power of attorney is not durable? How is the principal's incapacitation even determined?

Join us at this Webinar as we consider these topics as well as other common questions, all in an attempt to help financial institutions make informed business decisions when presented with powers of attorney.

Topics of Discussion

- Laws governing powers of attorney
- Legal sufficiency considerations
- Accepting or rejecting powers of attorney
- Attempting to determine a principal's mental capacity
- Authority of attorney-in-fact to perform transactions
- Termination of a power of attorney
- Dealing with multiple attorneys-in-fact

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BANKERS' COMPLIANCE GROUP®

phone: 800.742.3600

fax: 949.474.0617

Email: info@bankerscompliancegroup.com



* Janet Bonnefin is retired from the practice of law with the firm

Dealing with Powers of Attorney — On-Demand

ON-DEMAND WEBINAR

This Webinar was originally presented on July 25, 2023. There will be no live Q&A sessions but the recording does include the recorded Q&A sessions. This program is 1.5 hours in length.

Member Status	On-demand Pricing
BCG Member	\$295
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MCLE: As an added benefit we are offering this Webinar to in-house attorneys for MCLE credit. This activity has been approved for Minimum Continuing Legal Education credit by the State Bar of California in the amount of **1.5 hours**. Aldrich & Bonnefin certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the State Bar of California governing minimum continuing legal education.