

December 9

2021

Webinar

Dealing with Powers of Attorney

Thursday, December 9, 2021
10:00—11:30 a.m. PST

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

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While powers of attorney are not supposed to be overly complicated, it can be difficult for a financial institution to determine whether to accept any given power of attorney. To make things worse, many powers of attorney are not clearly drafted which then raises concerns over whether an attorney-in-fact is authorized to access the principal's financial accounts.

What are the rights of financial institutions when it comes to relying on a power of attorney? Can an institution accept a copy of a power of attorney if the original is not available? 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? What if there are multiple attorneys-in-fact or multiple powers of attorney?

Join us at this Webinar as we answer these and other questions. As part of our discussion, we will also consider the protections afforded a financial institution when accepting a power of attorney that is covered by the California Power of Attorney Law.

Topics of Discussion

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

ON-DEMAND STREAMING AVAILABLE

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PRICING

When registering online, please select from the following options:

Live Webinar (Single Connection—with up to 5 users)	\$275.00 (BCG Members)
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	\$395.00 (BCG Non-members)

REGISTRATION

To register, please contact your institution's Main Contact or, if authorized, log in at <https://register.bankerscompliancegroup.com/subadmin> and select "Register for Events."

Registration for the Live Webinar closes at noon on Monday, December 6. Registrants will receive an email on how to download the materials and make the connection for the presentation two business days before the Live Webinar.

Streaming the On-Demand Event will be available 3 business days after the Webinar is held. Registrants may stream the event for 60 days after purchase. Registrants will receive an email with instructions on how to access the On-Demand Webinar and download the materials within approximately 24 hours after we have confirmed your payment has been received.

If you have not established an online event registration account, please contact Katrina Jensen at 800-742-3600 or email her at info@bankerscompliancegroup.com to obtain a username and password.

PAYMENT

BCG Members: This Webinar is offered to BCG members on an optional basis. BCG Members will be billed and do not need to pay online or send a check.

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CANCELLATION POLICY

BCG Members: We must receive your written cancellation notice by 10:00 a.m. on Monday, December 6 with no charge. If we receive your cancellation request after this deadline, we will bill you \$50. However, if we have already sent an email with your PIN by the time we receive your cancellation request, we will bill you the full registration fee.

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ACCREDITATION

(Continuing Education credit will be provided only to the registrant)

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.