

February 25

# 2020 Webinar

## Understanding Powers of Attorney

Tuesday, February 25  
10:00 – 11:30 a.m.

*Speaker:*

*Keith Forrester*

*Principal, Aldrich & Bonnefin*



### WHO SHOULD ATTEND?

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

*Presented by Counsel for Bankers' Compliance Group®*  
**ALDRICH & BONNEFIN, PLC**

**T**here are a number of laws governing powers of attorney which makes determining whether to accept any given power of attorney difficult. Further complicating matters, often a power of attorney is not clearly drafted which then raises concerns over whether to permit the attorney-in-fact to access the principal's financial accounts or safe deposit boxes.

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 Probate Code.

### 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

A CD also will be available for purchase!

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&  
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### PRICING

When registering online, please select from the following options:

Live Webinar (Single Connection)	\$255.00 (BCG Members)
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CD-ROM	\$255.00 (BCG Members)
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Live Webinar <u>AND</u> CD-ROM	\$460.00 (BCG Members)
	\$640.00 (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 closes at noon **three business days** prior to the Webinar date. Registrants will receive an email on how to download the materials and make the connection for the presentation two business days before the Webinar.

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](mailto: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.

**Non-members:** We must receive payment no later than 10:00 a.m. on Thursday, February 20. Non-members may pay by credit card or check. To pay by credit card, follow the credit card instructions during the online registration process. Major credit cards are accepted. To pay by check, make checks payable and mail to **Aldrich & Bonnefin, PLC, P.O. Box 19686, Irvine, CA 92623-1029**, and indicate the event for which you are registering.

### CANCELLATION

**BCG Members** will be billed \$50 unless we receive a written cancellation notice by 10:00 a.m. on Thursday, February 20.

**Non-members** will be **fully** refunded if we receive a written cancellation notice by 10:00 a.m. on Thursday, February 20. Otherwise, the registration fee, less \$50, will be refunded.

### 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.