

July 25

2023

Webinar

# Dealing with Powers of Attorney

Tuesday, July 25, 2023  
10:00 - 11:30 a.m. PT

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.

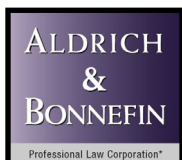
During this Webinar we will examine the protections afforded a financial institution when accepting a power of attorney that is covered by the California Power of Attorney Law. We will even address whether an institution can accept a copy of a power of attorney if the original is not available. Also, 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

ON-DEMAND STREAMING AVAILABLE



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

## July 25, 2023 Webinar — Dealing With Powers of Attorney

### PRICING

When registering online, please select from the following options:

Live Webinar (Live Webinar connection allows only 1 user)	\$275.00 (BCG Members)
	\$375.00 (BCG Non-members)
On-Demand Event ( <b>available 3 business days after Webinar is held</b> )	\$295.00 (BCG Members)
	\$395.00 (BCG Non-members)

### REGISTRATION

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

Registration for the Live Webinar closes on **Thursday, July 20, at 10 a.m.** 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](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 for the Live Webinar no later than **10:00 a.m. on Thursday, August 3.** Non-members may pay by ACH, wire or check for the Live Webinar and the On-Demand Event. To pay by ACH or wire, email [info@bankerscompliancegroup.com](mailto:info@bankerscompliancegroup.com) for instructions. 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 POLICY

**BCG Members:** We must receive your written cancellation notice by **10:00 a.m. on Thursday, July 20**, 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.

**Non-members:** We must receive your written cancellation notice by **10:00 a.m. on Thursday, July 20**, in which case we will refund your registration fee. If we receive your cancellation request after this deadline, we will refund your registration fee, less \$50. However, if we have already sent an email with your PIN by the time we receive your cancellation request, your registration fee is non-refundable.

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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.