



# VIRTUAL ETHICS FORUM

## “ETHICAL CONSIDERATIONS WHEN YOUR CLIENT MIGHT HAVE DIMINISHING CAPACITY”

TUESDAY, APRIL 26, 2022  
8:30 – 10:30 A.M.

Have you ever met with a client and thought, is my client slipping mentally? Worse yet, have you ever been in a situation when a family member to a client has taken a more involved role and wondered why isn't your client speaking up and, when you question the client, they do not seem the same? What do the ethics rules tell us about these interactions?

Join us for a discussion on the PA Elder Abuse statutes along with the requirements of the surrounding states. We will look at:

- PA professional code of conduct for lawyers
- Best practices per a private trust company
- Best practices in the Advisory/Financial Planning Industry

Following the presentation, we discuss case studies of some real-life situations.

**Two Education Credit for CLE (ETHICS-PA Only), Insurance (PA Only), CFP, CPA (PA Only), PACE and CTFA will be offered.**

### **Speakers:**

- Richard Bell, CKA, Planning Capital Management
- Karen Fahrner, Heckscher, Teillon, Terrill & Sager, P.C.
- Melinda G. Rath, Glenmede

### **Zoom Log-In Information**

Log-in information will be sent to all registered attendees the day prior to the program.

*We have reviewed several video communications services and have chosen Zoom for this event. Unfortunately, not all firms permit the use of Zoom so if you are prevented from using it to attend this event due to company restrictions, please join us using a personal computer or cellular phone or by simply dialing in and listening to the event from a telephone. If you will be using a personal device, please test your connection early; an app or registration may be needed the first time Zoom is used.*

The Philadelphia Estate Planning Council does not render any legal, accounting or other professional services. The Council's programs and publications are designed solely to help professionals maintain their professional competence. In dealing with specific matters, the individual using any publication obtained through the Council or any information orally conveyed by speakers at programs sponsored by the Council or in materials distributed by the Council should research original sources of authority independently.

**APRIL 26, 2022 VIRTUAL ETHICS FORUM  
REGISTRATION FORM**

**Virtual Registration Fee:**

PEPC Members	\$35	Non-Members	\$50
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**Additional Fees:**

CLE Credit (Members)	\$15	CLE Credit (Non-Members)	\$15
Insurance Credit (Members)	\$15	Insurance Credit (Non-Members)	\$15
CFP® Credit (Members)	\$15	CFP® Credit (Non-Members)	\$15

***No-shows will be billed. No refunds after April 25, 2022.***

**ATTENDEE INFORMATION:**

Name: \_\_\_\_\_ Discipline: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**CONTINUING EDUCATION INFORMATION:**

**Fee: \$15 for CE Credits (2 credits offered)**

Continuing Legal Education (2 ETHICS credits).....Attorney ID: \_\_\_\_\_

Insurance Continuing Education (2 credits).....License Number: \_\_\_\_\_

CFP® Continuing Education (2 credits)..... Last 4 Digits of SSN: \_\_\_\_\_

*CTFA, PACE and CPA Certificates will be emailed to attendees after the webinar at no additional charge.*

**PAYMENT INFORMATION:**

Check Payment (Payable to PEPC)

Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at [www.philaepc.org](http://www.philaepc.org). **Members must be logged into the site to receive the discounted member pricing.**

**Return by Mail:** Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

**Return by Fax:** 856-727-9504

**Register Online:** [www.philaepc.org](http://www.philaepc.org)

**Questions:** 215-486-6215  
*(Registrations will not be accepted via phone)*