



Tara Anne Pleat, Esq.
Wilcenski & Pleat Law

Diminished & Diminishing Capacity – Proactive Measures to Protect Decisions of Clients and Fiduciaries

This program will review the concerns about diminished and diminishing capacity from the perspectives of both the client and their advisors, as well as that of a fiduciary who is managing assets for a beneficiary with diminished or diminishing capacity. There will be a discussion of strategies in drafting, meetings with clients and recommended actions to be taken by counsel to safeguard a client's wishes. In addition, there will be a discussion of considerations for fiduciaries administering trusts when the beneficiary may be suffering from diminished or diminishing capacity, particularly when traditional rules governing actions by counsel and by fiduciaries are poorly defined or inconsistently applied.

TARA ANNE PLEAT, Esq. co-owns the law firm Wilcenski & Pleat PLLC. She practices in the areas of special needs estate planning and administration, traditional estate planning and administration, long-term care planning, and elder law. She is a past Chair of the Elder Law and Special Needs Section of the New York State Bar Association. She is also an active member of the Trusts and Estates Law Section. She serves as Secretary on the Board of the Special Needs Alliance, an invitation-only, national network of leading attorneys dedicated to the practice of disability and public benefits law. She is also a Member of the Academy of Special Needs Planners and the National Academy of Elder Law Attorneys. She currently serves on the Board of Directors of New York NAELA.

Tara was elected as a Fellow of the American College of Trust and Estate Counsel (ACTEC) in 2016. She is a Past President of the Board of Directors of the Estate Planning Council of Eastern New York. She has been an adjunct professor of law at Albany Law School for the last ten years, where she teaches a course in the spring semester on estate and financial planning for the elderly and individuals with special needs, and is a co-author of the Lexis-Nexis Publication, New York Elder Law.

Join us on Wednesday, November 17, 2021

4:00 PM – 4:30 PM Virtual Social Networking.

4:30 PM – 6:00 PM Zoom Meeting

FREE for Preregistered Members - \$35 for Preregistered Guests

Virtual Meeting – Pre- Registration Required

Reservation needed by November 15, 2021

Pay by credit card – <http://www.123signup.com/calendar?org=sfepc>

MCLE: This activity is approved for MCLE credit of one hour by the State Bar of California & CFP®.

Excused Absence: Members can request an excused absence by mailing a letter, or sending an email (info@sfepc.org) to the Council Office prior to the meeting. Please address the letter to the Board of Directors.