

**MINUTES OF THE OCTOBER 8, 2015 MEETING
OF THE CONTINUING EDUCATION COMMITTEE**

Called to order 9:12 am

Present: Judges Becker, Brandt, Calabrese, and Attorney Bennet, PCA

Absent: Judges Blick, DeGennaro, Elkin, Kelly, Zelman

Discussion of minutes, posting of agenda for current and future meetings

Discussion of 2016 education programs

1. January 26, 2015: Fiduciary Responsibilities and Protection of Assets

Topics & Program Flow:

9:00 a.m. - 1:00 p.m.; 1 - 15 minute break

- a. Elder abuse – fraud watch (Speaker TBD) (60 min)
 - i. Financial
 - ii. Caregivers
- b. Forensic accountings (Steve Pednault, if available) (60 min)
- c. Bonds/restrictions on assets; Probate Court Rules 35 (Judge Streit-Kefalas, if available) (45 min)
- d. Remedies/best practices – (Judge Domenick Calabrese to moderate discussion) (60 min)
 - i. Best practices to avoid these situations: red flags
 - ii. Best practices once fraud is suspected
 - iii. Best practices when the problem is certain
 - iv. Suit on the bond (Speaker TBD)
 - v. Resignation versus removal

2. June 2016: Decedents' estates – possible topics

- a. Uniform POA Act
- b. Fiduciary access to digital assets and electronic data (Atty. Suzanne Walsh, possible speaker)
- c. Spousal share
 - i. Life use – how to value
- d. DAS Claims
- e. Insolvency

3. September 2016: Children's matters – possible topics

- a. Special immigrant juvenile status (speakers from USCIS)
- b. Change of name of minors
- c. Adoptions, confidentiality of adoption records

4. November 2016: Potpourri - placeholder – TBD

Next meeting: Wednesday January 13, 2016 at 11:30 am (after Executive Committee meeting)

Adjourned 10:50 a.m.