

Estate Planning and Financial Abuse Issues in APS

In-Person Event



In this interactive and informative advance training, participants learn the foundations of estate planning and its relation to financial abuse. They learn how to identify estate planning documents to enhance their investigations into financial abuse allegations including specific areas of actual potential abuse. Participants will have multiple opportunities to physically review common estate planning documents and gain helpful insight on specifics to look for in their investigations. Investigation and interviewing techniques including how to document their investigations so that they are more likely to be accepted for prosecution will be covered and participants will walk away feeling more confident in investigating these complex and common abuse allegations.

Learning Objectives

By the end of this training, participants will be able to:

- Identify all relevant estate planning documents
- Recognize the role and list options for Conservatorships in relation to financial abuse
- Understand mental capacity as it relates to estate planning
- Identify how to access and use estate planning documents for investigations into financial abuse
- Demonstrate important documentation skills for investigations for maximum potential of prosecution of financial abuse

After this course, APS professionals will have gained increased confidence and knowledge in navigating estate planning concerns and areas for potential abuse.

Course Requirements

It is suggested that participants have a year of experience investigating financial abuse allegations and understanding of interview techniques.



THE TRAINER

[Kira Wattenburg King, JD](#)

Continued on page 2

Dates and Location

Date: Dec. 5, 2023

Registration: 8:30a-9:00a

Time: 9:00a-4:00p

Location:

The California Endowment
1000 Alameda St
Los Angeles, CA 90012

Date: Dec. 6, 2023

Registration: 8:30a-9:00a

Time: 9:00a-4:00p

Location:

The Dept. of Aging & Adult Services
9445 Fairway View Place
Rancho Cucamonga, CA 91730
(Haven Room)



REGISTRATION

Fee: Registration is FREE
(lunch is on your own)

Please register through your respective county's training process.

Registration due date: no later than November 20, 2023



AUDIENCE

This course is designed for new and experienced APS professionals as well as Aging & Adult Service partners (e.g. In-Home Supportive Services, Long-Term Care Ombudsman)

Meet the Trainer

Kira Wattenburg King, JD, earned her law degree at UC Davis School of Law and was a prosecutor for the Sacramento District Attorney's Office. Her passion for litigation had led to teaching at UC Davis School of Law as an adjunct professor in Trial Skills. After leaving the prosecutor's office, Kira opened her own firm specializing in civil litigation and now proudly dedicates her practice solely to Estate Planning. Kira presents regularly at financial seminars.



In-Person Training Protocol

- Please review venue information (e.g. parking)
- Networking and registration take place from 8:30a-9:00a
- Training takes place from 9:00a-4:00p
- Attendees must arrive on time and stay for the entire training in order to receive full credit
 - If attendee arrives more than 30 mins late or leaves more than 30 mins early, they will not receive full credit

The Academy values the safety of all participants, staff, trainers, and stakeholders. The Academy requires that each member of our community (staff, trainers/ facilitators, learners, and other guests) comply with all **in-person service delivery protocols** prior to, during, and after in-person Academy trainings, coaching sessions, and any other Academy- hosted events, regardless of the location, in order to:

- Protect the health and safety of themselves and others
- Minimize the spread of COVID-19 virus and other variants

ADA

The Academy for Professional Excellence is committed to creating an inclusive and welcoming environment that appreciates and builds on diversity. In accordance with the Americans with Disabilities Act (ADA) of 1990, as amended, the Academy for Professional Excellence prohibits discrimination on the basis of disability. To request accommodations, please contact APSWI at apstraining@sdsu.edu.

Continuing Education

This course meets the qualifications for continuing education credits for LMFTs, LCSWs, LPCCs, and/or LEPs as required by the California Board of Behavioral Science for a total of 6 continuing credits. The Academy is approved by the California Association of Marriage and Family Therapists to sponsor continuing education for LMFTs, LCSWs, LPCCs and LEPs, Provider #91928. The Academy is approved by the California Board of Registered Nursing, Provider # BRN CEP15014. The Academy maintains responsibility for this program and its content. Certificates will be available for download 5-7 business days after course completion. **There is no cost for CEs.** Click here for information on how to [obtain CE Certificates](#).



We create experiences that transform the heart, mind, and practice.

Visit us at theacademy.sdsu.edu.

