An Alzheimer's Association Program

Building Relationships: A Holistic Approach to Legal, Banking & Investments

DESIGNED FOR LEGAL, BANKING & FINANCIAL PROFESSIONALS

Wednesday, May 1, 2019
7:30 a.m. to 1:30 p.m.
Seaview Hotel and Golf Club
401 S New York Rd
Galloway, NJ 08205

Wednesday, May 8, 2019
7:30 a.m. to 1:30 p.m.
Crowne Plaza Cherry Hill
2349 W. Marlton Pike (Route 70)
Cherry Hill, NJ 08002

Attend and learn about:

- Alzheimer's disease: risk factors, warning signs and resources
- Power of Attorney: practice and pitfalls
- Incapacity and guardianship
- Financial elder abuse in your community
- Funding long-term care plans

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7:30—8:30 a.m.	**Registration and Continental Breakfast**
8:30—9:00 a.m.	**Welcome and Overview** Mary Beth Lewis and Effie Murphy, Alzheimer's Association
9:00—9:50 a.m.	**Power of Attorney: Practice and Pitfalls** Samuel Fineman, Esq., Cohen Fineman, LLC Learn about the legal facets of creating and revoking the power and tackle legal challenges in the uniform application of POAs vis-a-vis banking, mental capacity and liability.
9:50—10:40 a.m.	**Incapacity and Guardianship** Chris Bratton, Bratton Law Group, Estate and Elder Care Attorneys Planning for potential incapacity is something everyone should consider. While planning ahead is certainly the better option, for those individuals and family members that find themselves in a situation where the execution of a power of attorney is no longer a viable option, the final option may be a guardianship. A guardianship is decided upon by a court of competent jurisdiction after the appropriate pleadings are filed by those seeking guardianship. This presentation covers items such as procedures behind filing, who may file, and when a guardianship is required.
10:40—10:55 a.m.	**Break**
10:55—11:25 a.m.	**Financial Elder Abuse in Your Community** Marc Mugler, AVP, Banking Center, Manager, OceanFirst Bank, N.A. This session addresses several fraudulent scams via phone and e-mail that target the elderly. Recognizing clues that elder abuse is taking place will be examined. You will learn how to see changes in your customers that indicate they are a victim or are being targeted for exploitation.
11:25 a.m.—12:15 p.m.	**Funding Your Long-Term Care Plan** Joseph T. Travagline CFP®, Managing Director – Investment Officer and Fundamental Choice Portfolio Manager at Travagline Wealth Management Group of Wells Fargo Advisors This session covers the basics of long-term care including the cost and funding the cost of care. Joe will also present the Envision® process to forecast needs and financial ability.
12:15—12:45 p.m.	**Panel Discussion** facilitated by Anne Markel-Crozier, Bratton Law Group
12:45—1:30 p.m.	**Lunch and Networking**

With more than two decades of legal experience behind him, **Sam Fineman** is a multi-faceted attorney who is at home in the worlds of litigation, corporate law, estate planning, elder law and internet law, among others. Mid-career, Sam predicted the baby boomers' demand for elder law and estate planning services and dutifully trekked back to school to acquire his LLM in taxation and certificate in estate planning from Temple Law to better serve the ever-expanding elder-law population. Since then he has not looked back and thoroughly enjoys the satisfaction of serving his clients while helping them age gracefully, independently and safely. A former legal journalist (for ALM publications and law.com) and humorist, Sam holds a B.A. in English from Cornell University and a J.D. from Widener Law. When he's not championing his clients' interests, Sam teaches Estates/Trusts and Civil Procedure for paralegals at Rowan College at Burlington County.

Charles "Chris" Bratton, II is a founding member of Bratton Law Group, Estate and Elder Care Attorneys and practices estate planning and administration, elder law, and disability planning with the firm with locations in Haddonfield, Ewing and Linwood, NJ and Philadelphia, PA. Chris is chair of the trust, estates, elder law and life care planning division of the firm and counsels clients with regard to estate planning, asset preservation, and Medicaid qualification issues; as well as advising professionals in these matters. He is a member of the National Academy of Elder Law Attorneys and Life Care Planning Law Firms Association and is also the past chair of the Young Lawyers Committee and trustee of the Camden County Bar Association. Chris earned his B.S. degree, cum laude, from Southeastern Louisiana University, his J.D. degree from Rutgers University, and his LLM degree from Western New England School of Law.

Marc Mugler has been with OceanFirst Bank since 2014. He has worked in Business Development, Client Relations, and now manages their Banking Center in Collingswood, NJ. Marc is a graduate of Drexel University where he majored in Finance and Management. He was a 401(k) Pension Administrator for the Vanguard Group and Client Relations Manager for Merrill Lynch for more than 11 years.

Prior to his time in the financial sector, Marc graduated from the Delaware County Police Academy and spent 15 years as a Municipal Police Officer and Instructor in Pennsylvania. He spent many years working on white collar crime and fraud cases involving the elderly and disabled. Marc retired from law enforcement to help meet the demands of serving as Guardian and caring for his older brother who is a TBI (Traumatic Brain Injury) survivor and is now suffering from early onset dementia.

Joseph Travagline CFP® has been a CERTIFIED FINANCIAL PLANNER™practitioner since 2017. He has met the stringent criteria based on experience and expertise to act as a personal portfolio manager. He provides daily leadership and strategic direction of the Travagline Wealth Management Group of Wells Fargo Advisors, which handles more than 750 households and manages $216 million in client assets as of November 2018. Joseph constructs portfolios utilizing active asset allocation management with the goal of long-term capital appreciation or income. Joseph joined Prudential Securities, a predecessor firm of Wells Fargo Advisors, as a Financial Advisor in 1995, and he advanced to become Managing Director–Investment Officer in 2015. Joseph holds Series 7,3,63 and 65 securities registrations, is licensed in Commodities as well as applicable health and life insurance.

Anne Markel –Crozier BSW, CSW, Bratton Law Group, Estate and Elder Care Attorneys' Director of Care Coordination brings more than 25 years experience working closely with the elderly in many different facets of health care, including adult day care, long term care, behavior management, hemo-dialysis, sub-acute rehab, ventilator, hospital settings, and assisted living facilities. She specializes in assisting clients and their families in coordination of their health and long-term care, serves as their advocate and empowers them with the knowledge to attain the highest quality of life given their specific circumstances so they no longer have to manage the complexities of care coordination alone. Anne graduated from Monmouth College with a degree in social work, and received her Gerontology Certificate from Florida State University.

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REGISTRATION FORM

$40 per person—general admission

$100 per person with continuing education: CFP, NJ Insurance, CLE

THREE WAYS TO REGISTER.
Register ONLINE (see links below). Or CALL 800.272.3900.
Or PRINT and complete one form per registrant.
Mail completed form to:
Alzheimer's Association ~ 399 Market St, Ste. 102, Phila., PA 19106 Attn: Sharon Jarnette.
For questions, please contact Sharon Jarnette at sjarnette@alz.org or 800.272.3900.

Continuing Education Hours Available

National Certified Financial Planners: 1 Credit; Provider No: 1913
NJ Insurance: 1 Credit; Provider No: 30281
PA CLE: 1.5 Substantive; **additional $3 per person processing fee (day of event; bring exact change)**
NJ CLE: 2.2 Substantive

☐ **May 1**—Seaview Hotel and Golf Club in Galloway, NJ—April 26 registration deadline.
Register at **tinyurl.com/May1LegalBankingForum**.

☐ **May 8**—Crowne Plaza in Cherry Hill, NJ—May 1 registration deadline.
Register at **tinyurl.com/May8LegalBankingForum**.

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If registering for continuing education hours, circle one: CFP, NJ Insurance or CLE.