

# Dealing with Power of Attorney & Living Trust Documents

Distance Learning

Wednesday, January 6, 2010 • 3:00 pm – 4:30 pm Eastern

Power of Attorney documents and Living Trust documents are complex legal instruments frequently used by your members to transact business with your credit union. Each day you may have individuals claiming to be the Attorney-in-Fact for your member or the Trustee of your member's living trust. If not handled properly, these situations can expose your credit union to significant risk. Learn everything your credit union needs to know about Powers of Attorney and about Living Trusts. All aspects of Power of Attorney documents and Living Trust documents will be covered, including the steps you can take to reduce the credit union's risk of loss.

## HIGHLIGHTS

- What does a valid Power of Attorney document look like?
- What does a valid Living Trust document look like?
- What are the relationships among your member, your institution, and the Attorney-in-Fact or Trustee?
- What actions can the Attorney-in-Fact or the Trustee take on behalf of your member?
- When does a Power of Attorney or a Living Trust terminate?
- What steps can your credit union take to reduce risk from Powers of Attorney or Living Trusts?

## ABOUT THE PRESENTER – Elizabeth Fast, JD & CPA

Elizabeth Fast, Esq. is a partner with Spencer Fane Britt & Browne LLP where she specializes in the representation of financial institutions. Elizabeth is the head of the firm's training division known as Bankers Choice. She received her law degree from the University of Kansas and her undergraduate degree from Pittsburg State University. In addition, she has a Master of Business Administration degree and she is a Certified Public Accountant. Before joining Spencer Fane, she was General Counsel, Senior Vice President, and Corporate Secretary of a \$9 billion bank with more than 130 branches, where she managed all legal, regulatory, and compliance functions. She is a member of the Missouri State Banking Board by appointment of the Governor.

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## Sign Us Up!

## Dealing with Power of Attorney & Living Trust Documents January 6, 2010

Credit Union \_\_\_\_\_

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

Contact Person \_\_\_\_\_

Format Ordered

Email Address \_\_\_\_\_

\_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_



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