Missouri Chapter National Academy of
Elder Law Attorneys

Agenda

What Your Financial Advisor Isn't Telling You: "A Fiduciary's Handbook and Roadmap to Standardized Procedures and Investment Success"

August 8, 2024 – Lunch & Learn Virtual Event

12:00pm to 12:05pm – Greeting and Introductions

12:05pm to 1:00pm – What Your Financial Advisor Isn't Telling You: "A Fiduciary's Handbook and Roadmap to Standardized Procedures and Investment Success"

This Lunch & Learn educational session presented by Darryl Lynch, AIF® and Peter Palumbo, AIF® will take you step-by-step through the process and procedures of fulfilling your responsibilities as a conservator and reducing your liability at the same time. You will gain useful tools, techniques and samples forms to use as a guide when working with client's assets. These techniques will allow you to reduce your liability and learn industry secrets that most financial firms don't want you to know.

Overall objectives for this presentation:

1. *Participants will gain access to useful tools and standardized forms that they can use in their everyday practice to determine if they should invest a client's funds or not.*
2. *Participants will learn procedures to help them determine cash flow distributions from investment accounts and how to calculate the appropriate level of risk*
3. *Participants will understand the most common mistakes to avoid when investing client funds and insider tips that most financial advisors don't want you to know*

This presentation will have something for the first-time guardian all the way to the most advanced. It will highlight strategies to ensure equitable treatment and access to resources for all individuals under guardianship, particularly those from marginalized or underrepresented groups.

Evaluations: will be emailed to participants after the workshop

CLE: This educational program has been approved by the Missouri Bar for **1.1 CLE Credits** and is pending approval in Kansas.