



AMERICAN ASSOCIATION of DAILY MONEY MANAGERS

Financial Powers of Attorney: Practical Applications and Limitations

Wednesday, March 21, 2018 at 7 p.m. Eastern (6 p.m. Central, 5 p.m. Mountain, 4 p.m. Pacific)

Registration Ends March 14

*1 Credit hour to Standards of Practice, Types of Expenses PDMM® recertification.

This webinar is designed to provide basic background on agency law concepts and selected statutory rules applicable to financial powers of attorney. The webinar will use practical examples to illustrate frequently asked questions, common uses for powers of attorney, and limitations presented. Participants will learn to spot and solve common issues presented by financial powers of attorney.

Intended Audience: DMMs currently serving as agents under a financial power of attorney for their client base or considering adding this service to the services they offer; DMMs and other firms who are presented with powers of attorney or asked to honor them.

Presenter: Erica E. Lord, Senior Legal Counsel/Senior Vice President, The Northern Trust Company

Erica advises Northern Trust's Wealth Management, Estate Settlement, and Global Family Office divisions, as well as The Northern Trust Company of Delaware, on fiduciary matters affecting trusts of which Northern acts as fiduciary. She regularly advises regarding fiduciary duties and decisions affecting beneficiary distributions, agency relationships, investments, lending, estate administration, foreign trusts, and retirement benefits. On a regular basis, Erica works closely with business leaders to resolve complex questions involving powers of attorney, agency concepts, and their intersection with complex fiduciary issues.

Registration: The deadline to register is **March 14**. Register online or complete the PDF registration form and mail, email or fax to: AADMM Registration Office, 174 Crestview Drive, Bellefonte, PA 16823, Email: registration@aadmm.com, Fax: 814-355-2452.

Note: Registration is for one entrant. Any other individuals who would like to join this session are required to complete their own registration forms. The registration fee is set per person, not per connection.

Confirmation: Registrants will be notified on how to participate in a follow up email.

