

# CCCBA Elder Law Workshop

January 27, 2021

**Jill A. Judson**

California Licensed  
Professional Fiduciary



**CSC Fiduciaries, Inc.**

*We Manage Your Affairs So You Don't Have To*

Once an Adult  
... Twice a Child

What do they  
have in  
common?



What is a  
Fiduciary ?

**A FIDUCIARY IS A PERSON WHO ASSUMES  
RESPONSIBILITY FOR A POSITION OF TRUST**

# What is a Fiduciary ?

## **A Professional Fiduciary Serves in Many Legal Capacities:**

- **Trustee**
- **Attorney-in-fact**
- **Healthcare Agent**
- **Executor / Administrator**
- **Conservator**
- **Guardian**
- **Custodian**
- **Daily Money Manager**
- **Social Security Rep Payee**

What Really Is  
A Professional  
Fiduciary ?

- Friend
- Confidant
- Advocate
- Shopper
- Someone to take your call at 2 am
- Someone to sit with you in the  
Hospital
- Hand Holder

Fiduciaries  
Wear Many  
Hats !



What  
Really  
Is A  
Professional  
Fiduciary ?

“RENT-A-DAUGHTER”

# Cruise Director



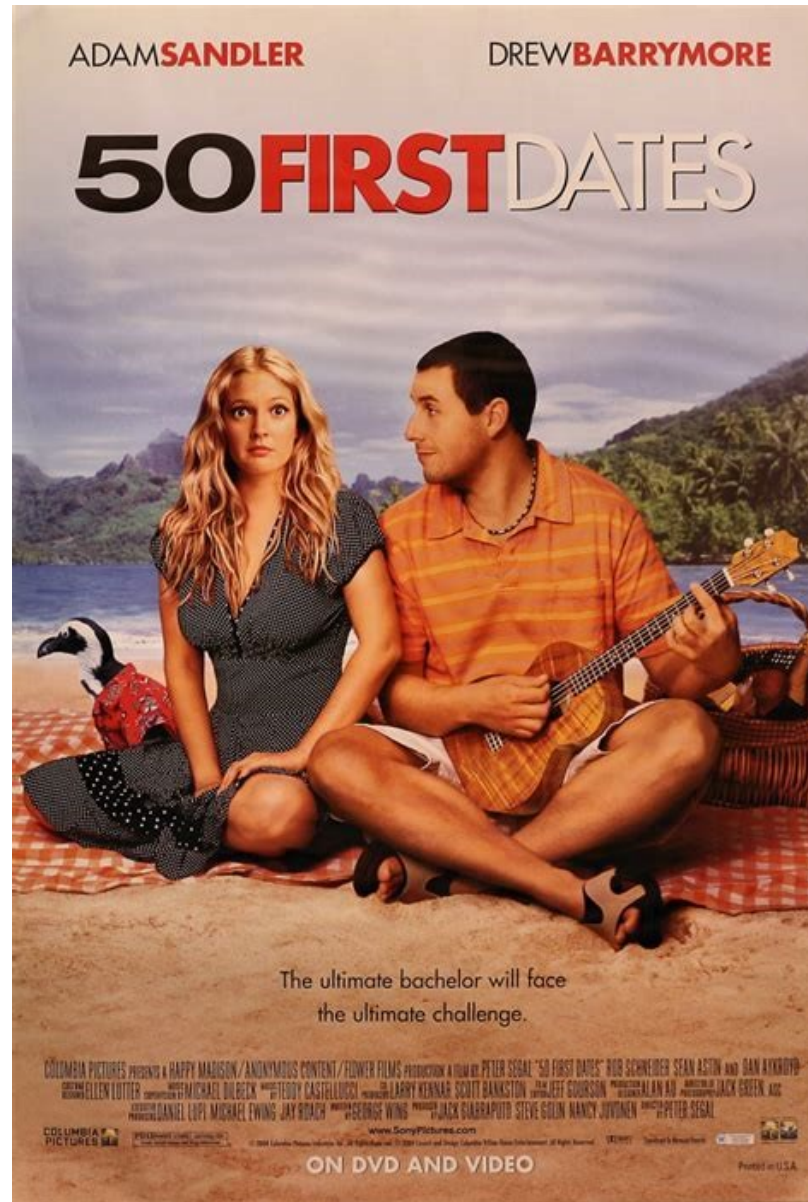
Love Boat  
or  
Sinking Ship  
???



# 50 First Dates

...

## It Can Happen At Any Age



## Two Brothers



# Three Sisters



# Lonely Mom



# California End of Life Option Act



Remember !



Ultimately,  
It's All About  
PEOPLE



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