CCCBA Elder Law Workshop

January 27, 2021

Jill A. Judson

California Licensed Professional Flduciary



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 <u>Really</u> 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

lt Can Happen

At Any Age

ADAMSANDLER

DREWBARRYMORE

50FIRSTDATES The ultimate bachelor will face the ultimate challenge. COLUMBIA PICTURES PROBATA HARPY MARISON / AND MARISO POWTENT / FLOW IN FILMS PROBATION A TIME THE PICTURE STATE THE PICTURES AND THE PICTURES TER ""ETEMISTACI DUEELK "TETEDY CUSTILLISTI "ELARY KENAR SCOTT RUKSTON "BLEF SURSON "TETED Antoconni lofi mistaci finns, lay folgy ""deense wins ""Tuck subbardo stef soon kans, jotana " www.SonyPictures.com 100 PICTURES BL ON DVD AND VIDEO

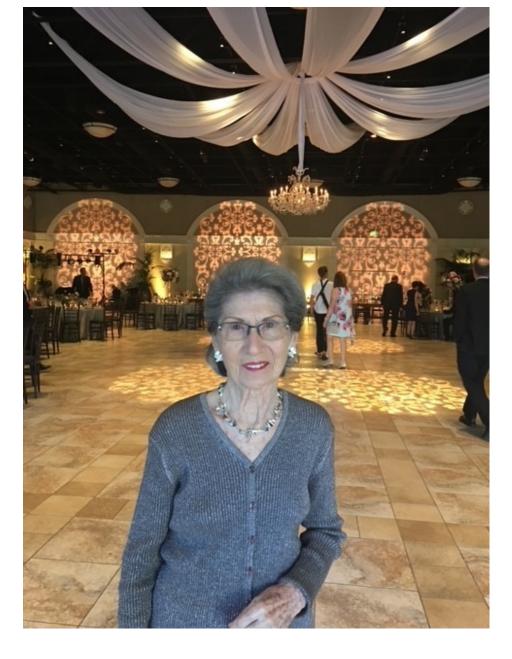
Two Brothers



Three Sisters



Lonely Mom



California End of Life Option Act



Remember!



Ultimately,

It's All About

PEOPLE



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