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Timothy W. Woodhouse, JD, CPA
Aries Wealth Management
Tel: (207) 650-5902
twoodhouse@arieswealthllc.com

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Kerry Peabody, CLU®, CLTC
Clark Insurance
Tel: (207) 523-2253
kpeabody@clarkinsurance.com

Vice President

Rebecca A. Burchill, CLU®, ChFC®
Lebel & Harriman LLP
Tel: (207) 773-5390
rburchill@lebelharriman.com

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Honeck & O'Toole
Tel: (207) 774-0882
kbusby@honeckotoole.com

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Jensen Baird Gardner & Henry
Tel: (207) 775-7271
tgoldsmith@jbggh.com

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People's United Bank
Tel: (207) 828-3012
Suzanne.rende@peoples.com

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MAINE ESTATE PLANNING COUNCIL

Meeting Notice

Date: October 17, 2019

Location: Portland Country Club

Time: 7:30 – 9:00 A.M.

Topic: Helping the Cranky/Stubborn/Oppositional Elderly Client. This panel discussion with a local lawyer, eldercare consultant and mediator will cover frequent situations encountered by professionals assisting elderly clients, such as conflicts with adult children, conflicts with care givers, and multiple aspects of difficult transitions from independence to accepting various levels of assistance. We will highlight some of the resources professional advisors and family members can hire to make these difficult situations more harmonious.

Speakers:

D. Kelley Young has been a trust and estates, business and tax lawyer for over thirty years, first in Burlington, Vermont and, since 1990, in Portland. Kelley advises business owners with regard to transactions and succession, and advises Personal Representatives, Trustees and beneficiaries with regard to their obligations and rights in trusts and estates. Born and raised near Rutland, Vermont, Kelley returned to Northern New England following his graduation from Stanford University to become a Certified Public Accountant with the Portland office of what was then Peat, Marwick, Mitchell and Company.

Lynn Peel has been a leader in the senior care industry since 2001. Prior to founding Beach Glass Transitions, she worked in a variety of roles in admissions, marketing, and director positions for Independent, Assisted Living, and Dementia Care Communities, as well as with a home health care agency. During her tenure in this work, Lynn worked closely with families who were facing the huge challenge of transitioning an aging loved one into eldercare services. The process is expensive, confusing, emotional, and incredibly time-consuming. Lynn created Beach Glass Transitions in 2008 to provide these families with one point of contact, a trusted professional Senior Care Advisor to guide them through the major transition. With Lynn's intimate knowledge of the senior care industry and her passion for assisting families, she is an expert in navigating the maze of senior care resources.

Karen Groat, Director of Family and Community Mediation (FCM), formerly with the Opportunity Alliance, has worked closely with mediators, families, communities and organizations for over 18 years specializing in complex family matters and multi-party disputes in over 3500 mediations. As an experienced Transformative practitioner, trainer and conflict coach, Karen combines research from neuroscience, trauma-informed care, and relational practice to assist families as they navigate the many life transitions often exacerbated by other crises in physical or mental health, and the experience of loss or grief. In 2018, FCM expanded statewide servicing Maine's Agricultural Mediation Program in partnership with University of Maine Cooperative Extension addressing issues impacting Maine's agriculture and rural communities including farm succession planning. Karen also provides private and court-related services since 2002.

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Free for Members; \$50 for non-members