

**Collaborative Interdisciplinary Trusts & Estates Team Training
for Trust and Estates Professionals**

Attorneys, Licensed Mental Health and Eldercare Professionals, and Financial Planners

At This Unique Training, You Will Learn:

- Skills to begin a Collaborative Case
- Protocols developed for Trust and Estates Cases
- Ethical considerations when working in the Collaborative model
- How to work as a Collaborative Team
- Powerful ways to deal with challenging situations

WHERE: 1700 South El Camino Real
San Mateo, CA 94402

WHEN: Friday and Saturday, November 7 and 8, 2014
9:00 a.m. through 5:00 p.m.
Registration begins at 8:30 a.m.

COST: \$425.00
\$400.00 *Early Bird Registrations postmarked by 10/7/2014*

Includes: Demonstrations of typical Collaborative cases, participant role plays, and panel discussions by experienced practitioners.

Collaborative Practice Silicon Valley is a State Bar of California approved MCLE provider. This course has been certified for 13 hours of MCLE credit, Masters' level mental health, and financial professionals continuing education units.

Trainers: *Nancy Ross, LCSW, BCD, *Alan L. Nobler, JD, *Natalie Leininger CFP®, CDFIA™, Maureen O'Connell, JD, Keith Britany, MFT and Peter Johnson, PFP
**Trainers meet IACP standards*

Training Registration Form

Name _____ Profession _____

Address _____ Degree & License Number _____

City _____ State _____ Zip Code _____

Telephone _____ Email _____

(All registration confirmations are sent by email only.)

_____ Registration Fee: \$425.00 *(Lunch included)*

_____ Early Bird Registration Fee: \$400.00 postmarked by October 7, 2014

Detach and mail the registration form along with a check made payable to: Bauer Shepherd & Ross. To pay with a Visa, MasterCard or Discover credit card, please call Jean directly at (408) 973-1002.

Collaborative Practice Silicon Valley
Attn: Jean Petrick (email: jeanpetrick@sbcglobal.net)
10455 Torre Avenue
Cupertino, CA 95014
(408) 973-1002

Full refunds will be given outside 30 days of the training. A \$50.00 processing fee will be deducted. Refunds within 30 days of the training will not be given.