

# EMPOWERING SENIORS AVOIDING FINANCIAL ELDER ABUSE

**October 17, 2018**

**10:00 a.m. – 11:30 a.m.**

**Monterey County Superior Court**  
**Jury Room 1200 Aguajito Road,**  
**Monterey, CA 93940**

**Legal Services For Seniors Is Hosting An All-Star Educational Session For Empowering Seniors Against Financial Elder Abuse. Professionals And Consumers Are Welcome To Attend. The Panel Will Address Topics About Avoiding Scams, Undue Influence, Financial Abuse, And Capacity Issues. The Speakers Are As Follows:**



**Patricia E. McKeon, Ph.D.** specializes in Cognitive/Memory Assessment, Caregiver Education Supportive Psychotherapy, Rehabilitation, and Forensics. Dr. McKeon holds a M. Ed from Teachers College, Columbia University, New York and her M.S. and Ph. D. in the Clinical Psychology from Rutgers-The State University of New Jersey. Dr. McKeon has 35 years of experience in her field and she has been in private practice in California since 1987. Dr. McKeon acts as an expert witness and currently works at California State University of Monterey Bay.

**Annie Michaels, Assistant District Attorney of Monterey County,** Supervisor of the Consumer Protection, Environmental Crimes, Asset Forfeiture, Weapon Forfeiture, Real Estate Fraud and Truancy Units that investigates and prosecutes cases involving fraudulent, deceptive and illegal business activity that victimizes Monterey County residents and law abiding businesses, threatens public safety, or endangers the local environment. Ms. Michaels received her undergraduate degrees from Simmons College in Boston. She received her juris doctorate degree from Golden Gate University School of Law in San Francisco and was admitted to the California State Bar in 1988. She joined the Monterey County District Attorney's Office in 2006.

**Liza Horvath, CTFA, AIF, President of Monterey Trust Management and Private Client Services,** is an expert in trust management, family office and document management and storage and professional fiduciary services. In 1996 Liza was recruited by Bank of America Private Banking to open their offices in Monterey. In 1999, she later left B of A to open the Trust and Wealth Management Division for Santa Barbara Bank and Trust in Monterey and oversaw the Northern Region of the Wealth Management division as Regional Trust Manager for 13 years, until 2012, when she founded Monterey Trust Management .



*Our workshop is free but space is limited. Please call 831.899.0492 or write [workshops@senior.legal](mailto:workshops@senior.legal) to reserve your seat.  
Presented by Legal Services for Seniors, Kellie D. Morgantini, Executive Director. MCLE credits pending.*