

# **COURT-CLERGY CONFERENCE 2019**

**Topic: ELDERS – CONSERVATORSHIPS, TRUSTS & ESTATES**

**Speaker(s): Hon. Julia Kelety, San Diego Superior Court**

**What are three main points that the clergy should know about this subject?**

- Because some elderly people trust their religious leader more than anyone else, the clergy can be helpful in working towards a solution for issues arising from aging.
- Court conservatorships can be cumbersome and expensive, so alternatives should be considered carefully.
- Help concerned family and friends separate financial issues from issues of physical abuse and neglect.

**What are three ways in which clergy can help their congregants?**

- Encourage older members of the congregation to plan for possible incapacity.
- Explain to elderly congregants that it is okay to receive assistance from others.
- Be able to help identify those times when legal intervention is desirable or necessary.

**Three websites where clergy can go to learn more:**

- For information on conservatorships, go to [www.sdcourt.ca.gov](http://www.sdcourt.ca.gov) From the home page, click on “Probate” and then “Conservatorships.”
- For information on elder abuse and restraining orders, go to [www.sdcourt.ca.gov](http://www.sdcourt.ca.gov) From the home page, click on “Family” and then “Restraining Orders.”
- For information on probate, wills and trusts, go to [www.sdcourt.ca.gov](http://www.sdcourt.ca.gov) From the home page, click on “Probate” and then “Wills, Estates and Trusts.”

**Contact names, phone numbers and email addresses if clergy have questions:**

- Adult Protective Services, 1-800-510-2020
- Legal Aid Society for free clinic to help file for conservatorship: 1-877-534-2524
- Alzheimer’s San Diego: 1-858-492-4400