



Wills & Estates

On demand – available from 19 August 2023

Distinguishing concerns about client vulnerability, competence and decision making capacity

In this session presenter Michael Perkins examines a number of issues relating to client competence and capacity that cross the spectrum of professional practice. Topics covered include evaluating client competence and compliance with Rule 8 of the *Legal Profession Uniform Law Australian Solicitors' Conduct Rules 2015* (NSW), indicators of cognitive intactness, an advocacy approach to evaluating vulnerability and the related risks of coercion and abuse. The presentation also considers guidelines for cognitive responsive practice, and how practitioners can build decision making resilience in their client.

Meet the speaker

Michael Perkins, Principal Lawyer, Autonomy First Lawyers

Michael Perkins is a lawyer, author and educator with over 30 years' experience in trusts, estates and private client practice. Co-author of "Estate Planning: A Practical Guide for Estate and Financial Services Professionals", Michael is a strong supporter of Supported Decision Making in professional practice client care and managing a person's interests as they age. In addition to managing and delivering transactions for clients, Michael helps resolve broader complexity and conflict in the lives of his clients, where possible without resort to litigation or other dispute resolution processes. This capability is born from Michael's decades of knowledge of the law and deep understanding of how families need to operate to sustain themselves across generations. He helps clients deal with the practical, strategic and operational needs of their businesses, conservation of their assets, activating community and philanthropic interests and planning for succession to their estate over time.