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What Does An Elder Mediator Do...and Not Do?

By Bill Cohen, Certified Senior Advisor (CSA)®, Cohen Caregiving Support Consultants LLC



Is your family, or a client's, at an impasse regarding a family member's care? Do relatives disagree about the care decisions? (Some families cannot even agree about ordering pizza, let alone decide on a care plan!)

Parties can go to court or arbitration, where a legal professional or judge decides for them. Or, the parties may want to consider elder mediation. Elder mediators can help parties and caregivers for elderly or other disabled people make global, well-informed decisions about care, especially in contentious situations. Caring for a family member is exhausting and overwhelming, and family tension, dynamics, ulterior motives, or hidden objectives create undue stress on a caregiver and the elderly person or person with a disability.

An elder mediator can allow all parties to be heard, make helpful suggestions, and ultimately shepherd the parties to an agreeable resolution.

What does an elder mediator do?

An elder mediator guides conflicting parties who cannot agree about an elderly person or person with disabilities' care as an objective, neutral third party. They help the parties communicate better to find solutions together. The mediator listens to everyone's thoughts and feelings. They guide the parties to talk calmly, find common ground, and solve problems. This reduces conflicts and improves understanding. A mediated solution ensures the elderly person's wishes are respected.

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It also can lead to better overall care and well-being.

Elder mediators use these steps to guide them through the process:

- Introduce the parties and discuss how the process will work.
- Identify issues.
- Allow everyone to share their point of view and objectives.
- As needed, schedule individual and group conversations, all done in confidence.
- Facilitate discussion around the conflict's core problems, everyone's underlying needs, and the concerns of each party, with the elder family member's welfare being paramount.
- Build consensus and remove obstacles; brainstorm and discuss possible solutions that address everyone's objections, but especially keep in mind the elder relative's needs and care.
- Reach an agreement that is acceptable to all, write a statement clarifying what they all have agreed to, and articulate subsequent actions and plans.

From the Alternative Dispute Resolution (ADR) Academy in Florida from which I took the course:

"A trained elder mediator assists elders and their families as they make the important decisions that impact their quality of life."

When is elder mediation appropriate?

The parties should consider hiring an elder mediator when they cannot agree on critical decisions about a vulnerable party's health care or living arrangement. For example, some family members want the older person to move to a care home or community.

Others may want them to stay at home with assistance. Or, some deny there is a need to do or change anything. They may not want to spend a lot of money for selfish reasons. This leads to conflict. In such cases, an elder mediator helps the parties talk more calmly and listen to and understand others' concerns. Then, they find a solution that works best for everyone. This is vital for the well-being and happiness of the older relative.

What are elder mediation's advantages?

Elder mediation is a good option when you cannot make difficult decisions. Rather than going to court, we help parties reduce time, stress, and costs. A mediator helps the parties talk and work together to find solutions. They focus on what is best for the older relative, not on a "win" but preferably a "win-win". Mediation is faster than a court case, and everyone gets a say in the decisions. The parties seek a fair and peaceful path, everyone gets to be heard, and there is not a fight with a courtroom's drama. (That is why you probably will never see mediation on television or in a movie!)

Litigation can be lengthy, expensive, and stressful. A mediator is an impartial third-party facilitator. We do not make the decision for the family but help them find a solution that all parties can live with. Elder mediators help families:

- Save money
- Preserve relationships
- Stay out of court
- Protect privacy
- Negotiate a fair agreement

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When is elder mediation not suitable?

It is not for emergencies or urgent medical decisions. In such cases, first seek immediate medical attention. Also, if one or more family members or other involved parties will not participate, mediation might not work. This is also true if there is a history of abuse or violence. To ensure safety and well-being, you may need another form of support or intervention.

What will an elder mediator not do?

Finally, an elder mediator will not decide for the parties or take sides. Their role is to facilitate the discussion so the family understands each other better. They will not give legal advice or tell people what they should do. The mediator will not force anyone to agree on anything. Also, an elder mediator is not a therapist. They cannot fix or resolve family history or dynamics. The elder mediator can, however, help the elder and their family communicate better and improve their relationships. Most importantly, the family will feel less stressed and calmer because they all agree on a care plan for their person living with dementia. For many people, that sounds like a better option.

I have helped and mediated with families, both individually and in a group, in person and by video call. In these sample cases, I:

- Helped four siblings and three parents (including a stepmother) in six locations around the country navigate and agree on challenging legal and health care issues. In general, they were on the same page. However, there were some significant opinions and different approaches that needed to be resolved. Individual and group conversations paved the way to a common goal and plan. I also provided

many resources to help them better care for the elder family members.

- Mediated and met with four siblings and their aging parent multiple times over numerous weeks. They were spread out in four Pacific Northwest cities. I also met the elder in person and by video to better gauge her preferences while she was still able cognitively. This was to resolve their deep dispute over where and by whom the parent would be cared for due to her declining cognitive and physical health. The siblings were divided, but we kept communication going. At one point, a sister exclaimed, "Well, at least we're not yelling at each other!" They ultimately reached an agreement they could live with, and the parent would be well cared for. No one obtained everything they wanted. The sibling who made the initial contact was not pleased with the decision. He said, however, that I did my part well and helped them through the process professionally, and he wrote a positive review.
- Recommended, organized, and coordinated the care team and developed a plan for a foreign-based adult child. Their elderly parent living with dementia is local and was in crisis mode. I brought together several parties, individually and collectively: the daughter, stepfamily, care community, senior housing advisor, adult protective services, in-home care agency, social worker, and geriatric physician. I mediated an agreement and care plan among all concerned for the parent's welfare. Shortly afterwards, she was thriving in a safer, happier environment with the care she needed. Although the parent has had significant decline and tragic events since we

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started two years ago, I continue to support the adult child several time zones away and communicate with and coordinate their care team. If you and your family think your situation may benefit from a trained elder mediator, schedule a consultation. It can be your first step towards a quicker, less costly, and more satisfactory outcome.

Elder mediation can be the first step to a more amiable and caring future. Elder mediators can help families resolve their dispute in a compassionate, friendly, and neutral way while promoting the elder's self-determination. Mediators can find resolutions to what appear to be unresolvable differences. Rather than remain at an impasse, an elder mediator can help the parties talk and find out how to find a solution. ♦

About The Writer:

Along with supporting families as a Caregiving Support Consultant and Certified Senior Advisor® (CSA), I am a trained elder mediator. Increasingly, I assume this role for families. My loving and talented mother, Sheila, lost her home to Hurricane Katrina. Then, she lost her health, ability to create beautiful art, and, ultimately, her life due to Alzheimer's. For almost 10 years, I was her primary caregiver and advocate, not just her son. I turned my personal loss into my passion, supporting other caregivers.

After “retiring” from state employment and entering my “encore career” almost eight years ago, I am a caregiver support group and memory café leader, a podcast guest, a speaker, a Certified Senior Advisor (CSA)®, a trained elder mediator, and a caregiving support consultant. I have completed several caregiving courses through the Alzheimer's Association and the Society for Certified Senior Advisors (CSA)®, and earned business degrees from Boston and Portland State Universities.

I am a native New Englander and have lived in the Portland, Oregon area for 40 years with my wife and supporter, Lori. Along with supporting families as a Caregiving Support Consultant and Certified Senior Advisor® (CSA), I am a trained elder mediator. Increasingly, I assume this role for families. I can help them, or your client, who cares for a person living with dementia or other condition. Caring for a family member is exhausting and overwhelming. Add arguments, dynamics, ulterior motives, or hidden objectives, and a caregiver's stress grows exponentially. I can empathize: I was my mother's primary Alzheimer's caregiver and advocate for about 10 years. Along with managing her care, finances, and legal affairs, I had to interact with multiple relatives from my family and step family. They all had different perspectives and opinions. The ordeal included litigation regarding my mother's and stepfather's separation.

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More information:

<https://linktr.ee/CohenSupport>

Bridging the Gap: Estate Planning at The Commons Law Center

By Riley Gombart, J.D., Estate Planning & Probate Director at The Commons Law Center

Visit <https://thecommonslawcenter.org> for more information and services offered



At The Commons Law Center (The Commons), our mission is simple yet profound: to provide access to legal help for everyday people, because no one should be denied timely and affordable access to justice. For too long, many have been excluded from critical legal services, including estate planning and probate work. At The Commons, we focus on closing this access-to-justice (A2J) gap for low-income individuals and families. Through our Estate Planning and Probate (EP/PRB) Department, we help modest-means Oregonians preserve generational wealth and secure a future for their loved ones.

Our nonprofit law firm operates on a sliding scale, serving Oregonians living below 400% of the federal poverty level. This focus on affordability allows us to bridge the service gap between those who qualify for legal aid and those who can comfortably afford private attorneys. As a result, we ensure that more people can protect what they've worked hard to build, passing it on to the next generation. This mission-driven work empowers families to avoid the probate process, make informed decisions, and minimize potential conflict, all while creating a system that helps communities retain wealth rather than lose it to unnecessary legal costs.

Our Goal: Preserving Generational Wealth

Estate planning is an essential tool for preserving generational wealth, and at The Commons, we believe that everyone deserves access to these services. When low-income families do not have access to wills, trusts, powers of attorney, and other essential estate planning tools, they are more vulnerable to losing assets and wealth to court processes, legal disputes, and unnecessary taxation.

The consequences of a poorly or completely unplanned estate can be devastating to surviving family members—often resulting in family conflict, the forced sale of family homes, or financial instability for children and grandchildren.

Our EP/PRB department seeks to break this cycle by making estate planning accessible to underserved communities. We work with clients who may not be familiar with the importance of estate planning or who may feel they don't have "enough" to warrant planning. As I am sure this readership is well aware, the truth is that everyone, regardless of income, can benefit from estate planning. By providing affordable, quality legal services, we help people protect their homes, savings, and other valuable assets.

We ensure these resources can be passed on to children, grandchildren, or other heirs without becoming entangled in a lengthy, costly probate process. In this way, we contribute to preserving generational wealth and promoting financial stability across families and communities.

Additionally, our focus on wealth preservation is about more than just money. Estate planning can also ensure that important personal values and legacies are preserved and passed on, whether through setting up charitable trusts, leaving specific bequests for future generations, or ensuring that a loved one's final wishes are respected. By making estate planning accessible, we are helping to ensure that legacies—both financial and personal—are preserved for the future.

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Leveraging Technology for Efficiency and Access

The Commons Law Center is built on the belief that innovative use of technology can streamline legal services, making them more affordable and efficient. In our Estate Planning and Probate department, we employ technology in multiple ways to ensure we can offer services at significantly reduced rates while maintaining high-quality legal services and support.

One key innovation is our use of automation throughout our workflows. We have developed automated systems to handle much of the administrative workload, such as initial client onboarding. This automation creates an intuitive onboarding experience for clients, freeing up our legal staff to focus on complex tasks rather than getting bogged down in repetitive onboarding paperwork. Automated scheduling systems further streamline the process of setting up intake meetings, consultations, and document signing appointments, allowing for more flexibility and reducing delays in service.

Automated document generation plays a significant role in our practice. As we know, estate planning requires the drafting of multiple legal documents, such as wills, trusts, advance directives, and powers of attorney. Traditionally, this process is time-intensive, but our document automation tools cut down on drafting time by using comprehensive document automation systems. By automating standard legal forms and personalizing them for individual clients, we reduce the time needed to prepare these essential documents and can instead focus on the individual requirements of our clients where it matters most.

We've also integrated project management systems that allow us to track the progress of cases

efficiently, ensuring the entire team is on the same page.

These systems help us monitor important deadlines, track client communications, and ensure nothing falls through the cracks. The combination of technology and legal expertise enables us to offer affordable services without compromising quality. By adopting modern, efficient processes, we increase our capacity to serve more clients at lower costs, and we pass these savings on to the communities we serve.

Educating Our Community

One of the core components of our mission is community education. We understand that many people are unaware of the importance of estate planning, or they may hold misconceptions about what estate planning entails. This is why we prioritize community outreach through presentations and workshops designed to educate individuals on the value of planning for the future.

Our regular estate planning presentations focus on the basics, breaking down what estate planning is, who needs it, and why it's critical for people of all income levels. These presentations demystify concepts like wills, trusts, powers of attorney, and advance directives. We emphasize the importance of creating these documents before they're needed so that clients' wishes can be carried out effectively, and their families can avoid unnecessary legal disputes or financial burdens.

These sessions are particularly valuable in underserved communities, where misinformation or a lack of education on estate planning is prevalent. For instance, many assume that estate planning is only for the wealthy, but the reality is that people at every income level can benefit from having a well-constructed plan.

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Our educational efforts help break down these misconceptions and empower people with the knowledge to make informed decisions.

In addition to these general presentations, we offer monthly workshops on specific aspects of estate planning, such as powers of attorney and advance directives. During these workshops, attendees not only learn about the importance of these documents but are also given the tools to complete them on the spot. By empowering community members to take these steps themselves, we further reduce the legal burden on courts while helping people feel more confident and prepared.

Community Partnerships and Sustainability

At The Commons, we recognize that access to justice extends beyond the provision of legal services. That’s why we strive to build strong community partnerships and create educational programs that feed back into our legal service offerings. Charitable donations serve as seed capital, allowing us to develop new services, develop community outreach initiatives, and create long-term sustainable programs. This financial model allows us to provide affordable services while reinvesting in the community.

Our Legal programs support each other, allowing us to serve more people in need and create a ripple effect that extends across the community. Through our partnerships with other nonprofits, social service providers, and community organizations, we ensure that our clients have access not just to legal services but also to a broader network of support.

Our initial goal for the Estate Planning and Probate department was to be self-sustaining through earned fees, even at our reduced rates. We successfully

reached that goal towards the end of 2023 and have been working to further streamline our processes to be able to help more clients and to be able to create a more sustainable work environment for our attorneys and staff.

Revolutionizing Access to Estate Planning

At the heart of this work is a commitment to bridging the access-to-justice gap and ensuring that everyone, regardless of income, can protect what matters most. As we continue to grow and evolve, our goal remains the same: to provide affordable, timely, and essential legal services that help individuals and families build a legacy of security and stability for generations to come. ♦

About the Writer:

Riley (he/him) has been a Pacific Northwesterner for most of his life, growing up in Battle Ground, WA before settling in Portland. His practice has consisted of estate planning, probate, and business, but his passion is in developing systems and processes to improve the efficiency and quality of legal services to better reach currently under-served populations.

Riley received a B.A., cum laude, with a major in Business Administration from Washington State University (Vancouver) in 2011 and earned his J.D., cum laude, in 2016 from Lewis & Clark Law School, where he was an Article Editor of the Lewis & Clark Law Review.

In his spare time, Riley enjoys playing tabletop games with friends and family, hiking fantastic local trails, and perfecting favorite dishes from his backyard garden’s harvest. Whenever possible, he relishes the opportunity to travel with his wife to castles, art museums, and other stunning landmarks around the world while experiencing the local culture.

Ready, Aim, Fire...or Maybe Not:

The Ordeal of Terminating a Client

By Hong Dao, Director of the Practice Management Assistance Program at the OSB Professional Liability Fund



Editor's Note:

This article was originally published on the Professional Liability Fund's blog, inPractice, March 5, 2021, by Hong Dao. The author is the Director of the PLF's Practice Management Assistance Program.

You can read other inPractice posts or subscribe to the blog at <https://www.osbplf.org/blog/>

It's fairly easy for clients to fire their attorney. Some clients might issue an overt announcement like "you're fired!" Others might just make a polite statement that sounds more like a request such as, "Would you please give me my file so I can find another lawyer?" On the other hand, it's not always easy for lawyers to fire their clients. For many lawyers, terminating a client is a big ordeal that involves ruminating over many factors and then eventually delaying the actual firing. Issues such as the lawyer's ethical obligations toward that client, how and when to fire, or the client's response to being fired — including possible retaliatory action — are all worthy of consideration. While firing a client is not pleasant, it's sometimes a necessary risk management step that can preserve the lawyer's well-being and ultimate practice success.

Why fire clients

Certain types of clients make it challenging for lawyers to do their job and enjoy the practice of law. If not properly dealt with, these clients can become a malpractice risk. They may be more likely to blame the lawyer for a bad result in their matter, or they may not even be satisfied with the desired outcome stated at the outset. They may be more likely to find fault and

nitpick any course of action that the lawyer takes and use that as a basis to file a malpractice claim against the lawyer. At some point, the lawyer needs to cut his or her losses and terminate those types of clients.

Let's examine some types of clients that lawyers normally fire: (1) difficult clients; (2) lying clients; (3) involuntary "pro bono" clients; and (4) clients whose cases missed initial screening for red flags.

Difficult clients

Difficult clients are hard to work with because they can be combative, angry, hostile, or unpredictable. They mistreat you or your staff, demand a lot from you, but are not responsive to you. These clients are uncooperative and regularly miss or show up late to appointments. They also have unrealistic expectations that cannot be changed or managed. Clients who want to be the "lawyer" can also be difficult to work with. They second-guess your professional judgment and don't listen to your advice because they think they know better than you.

It's best to screen out these types of clients during the initial intake process. Sometimes, difficult clients are tricky to screen out because they may appear easy-going, sweet, and cooperative at the beginning. When those clients start to reveal their difficult side, try to work with them and explain how their behavior is harming the attorney-client relationship and perhaps their own matter. If that doesn't work, and they continue to make your practice or life miserable, it's time to consider firing them.

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Lying clients

Clients who outright lie to you or only disclose certain facts while withholding pertinent information can impede your ability to competently or diligently represent them. It's exhausting to confront those clients, and if you don't, a sense of unease tugs at you. The most frustrating part is that you may not know the client has been lying to you until pivotal moments like in a deposition, at a dispositive hearing, or at trial. It's important to recognize red flags that clients may not be telling the truth. Look for inconsistencies in what they tell you, lack of details or vagueness when asked about factual events, and even anger or hostility when pressed for information. Keeping clients whom you know are liars is a high risk for you and your practice.

Involuntary "pro bono" clients

When clients stop paying their bills or pay only a portion of their bill — sometimes late — and you still provide them with legal services, you've made those clients your involuntary "pro bono" clients. These clients also tend to question every charge in your billing statement and make a big issue out of it to try to get you to discount the charge or write it off completely. The reasons for nonpayment are myriad. Some clients just don't have the money. Others don't want to pay if they feel their matter is not going well or won't be resolved in their favor. A few may feel they are entitled to free services. Whatever the situation, be intentional about who you want to help and at what rate. If you're representing a client with the expectation of being paid, explain your billing procedures to them and enforce the rules for nonpayment in your fee agreement.

While nonpayment by a client is not a malpractice risk per se, a deteriorating attorney-client relationship can become an issue later on. These clients start to form the expectation that you will continue to work for them whether or not they pay you. They can resort to anger, a plea for pity, or a sob story to manipulate you into doing legal work for them, and

then retaliate when you try to collect on your fees. If a client still owes you money and you've given that person plenty of chances to pay, there is little to no reason for you to continue representing them for free.

Clients whose cases missed initial screening for red flags

Even when clients are honest, nice, and pay on time, lawyers might overlook or ignore certain red flags about the case at the screening or intake level. It could be that the case falls outside the type of cases the lawyer normally accepts. Or the lawyer disregards their lack of requisite skill and knowledge to take on the case. Or the lawyer underestimates or dismisses the time and resources necessary to be thorough and prepared for the case. Or the issues in the case have grown more complex over time, and the lawyer is just at a loss and now in over their head.

It's hard to concede that another lawyer may be more suitable than you to help the client. But keeping a case that is inappropriate for you will only expose you to both malpractice and ethical issues if you cannot competently or diligently represent the client.

How and when to fire clients

Before firing a client, review Oregon Rule of Professional Conduct (ORPC) 1.16(b), which specifies the permissible grounds for withdrawal. Specifically, a lawyer may withdraw from the representation if:

1. Withdrawal can be accomplished without material adverse effect on the interests of the client. ORPC 1.16(b)(1).
2. The client persists in a course of action involving the lawyer's services that the lawyer reasonably believes is criminal or fraudulent. ORPC 1.16(b)(2).
3. The client has used the lawyer's services to perpetrate a crime or fraud. ORPC 1.16(b)(3).
4. The client insists upon taking action that the lawyer considers repugnant or with which the lawyer has a fundamental disagreement. ORPC 1.16(b)(4).

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5. The client fails substantially to fulfill an obligation to the lawyer regarding the lawyer's services and has been given reasonable warning that the lawyer will withdraw unless the obligation is fulfilled. ORPC 1.16(b)(5)

6. The representation will result in an unreasonable financial burden on the lawyer or has been rendered unreasonably difficult by the client. ORPC 1.16(b)(6)

7. Other good cause for withdrawal exists. ORPC 1.16(b)(7).

Most of these grounds will allow you to withdraw from representing the types of clients described above. Follow the steps in ORPC 1.16(c) and (d) to withdraw properly. You're required to: (1) obtain the court's permission to withdraw, if necessary; (2) give reasonable notice to the client; (3) allow them time to hire another lawyer; (4) surrender papers and property to which the client is entitled; (5) refund any advance payment of fee or expense that has not been earned or incurred; and (6) take other steps to the extent reasonably practicable to protect the client's interest.

The timing of termination is crucial to your ability to withdraw. If you wait until a week before a hearing or trial to fire a client, it's going to be hard to successfully argue that your withdrawal won't harm the client when they only have a few days to find another lawyer.

If you're going to fire a client, do it sooner rather than later — ideally, declining a problem client at the outset. Heed the bad feelings in your gut about taking on that client or the uneasiness you feel when interacting with them. Give the client a chance to prove you wrong by sitting down with them and

explaining your concern. If nothing changes, then take swift action. Don't linger. Postponing the decision will only make it more difficult to withdraw as you approach deadlines, major events, and milestones in the case. Timely termination will protect not only the client's interest but also your own in the long run.

Practice tip: document, document, document

Your termination of the client should not happen in a vacuum. You need to document your communication and interactions that establish a basis for the firing. Documentation will help protect you if the client files an ethics complaint or malpractice claim against you as a result of the termination.

Documentation can be as simple as writing a memo to the file or adding a note to the case in your practice management software program. You can memorialize a conversation or event in writing and promptly send it to the client. You can also document by taking contemporaneous notes during an interaction or conversation with the client.

If your client is unresponsive, write down the dates and times you tried to reach them, and make a note of any voicemails you left or text messages you sent. In addition to documenting your conversations (phone calls, meetings, etc.) with clients, specifically document the client's instructions and your advice by following up with a letter or an email to the client.

More tips on how to properly document your file are available [here](#).

About the Writer:

Hong Dao is the Director of the Practice Management Assistance Program at the OSB Professional Liability Fund.

The Senior Law Project:

Meeting the Legal Needs of Multnomah County's Growing Senior Population

by Brett Cattani, Pro Bono Coordinator, Legal Aid Services of Oregon



Editor's Note:

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The senior population in Multnomah County is growing rapidly, with the US Census Bureau recently reporting that the Portland metro area's population of adults aged 65 and older is growing at a faster rate than the national average. With this demographic shift, the legal needs of the senior community will continue to expand. Many seniors face diverse civil legal issues, including housing stability, estate planning, financial security, and protection from fraud. For many seniors, these legal services are essential to maintain their independence and protect their rights.

Legal Aid Services of Oregon's Senior Law Project (SLP) has been a critical resource in addressing these needs. As the longest-running pro bono program in Multnomah County, SLP offers much-needed civil legal assistance to seniors who might otherwise be left without help. With 15 clinics a month held at seven senior centers, volunteer attorneys meet with up to six clients per clinic (in person or remote consultations), providing advice and support on a range of civil legal matters such as wills, powers of attorney, advance directives, housing, and consumer rights. All seniors, regardless of income, are provided a 30-minute pro bono consultation. Seniors that meet LASO income eligibility guidelines may be eligible for additional pro bono assistance outside the clinic.

Since its inception, SLP has been a lifeline for many in the senior community, filling a gap where affordable legal services are scarce. SLP volunteer attorneys make a tremendous impact. Their dedication and generosity ensure that seniors can access the legal support they need. Whether advising on how to draft a will or helping resolve a consumer dispute, the support offered by SLP volunteer attorneys can provide peace of mind and help seniors

maintain their dignity and autonomy. Senior center staff and center volunteers also play a pivotal role by serving as a bridge to connect seniors to essential resources, including legal aid assistance.

They help ensure that legal assistance is within reach for seniors who might otherwise be unable to afford it or know where to seek help. Seniors can apply by phone or in-person at any of the following locations:

The Community for Positive Aging
(formerly Hollywood Senior Center)
www.communityfpa.org
1820 NE 40th Ave., Portland
503.288.8303

Friendly House
www.fhpdx.org/for-adults-seniors 4610 SE Belmont St., Portland
503.721.6760

Immigrant and Refugee Community Organization (IRCO)
www.ircoco.org
740 SE 106th Ave., Portland
503.484.6371

Impact NW
www.impactnw.org
1737 NW 26th Ave., Portland
503.224.2640

Neighborhood House
www.nhpdx.org
688 SW Capitol Hwy., Portland
503.244.5204

Urban League Multi-Cultural Senior Center
www.ulpdx.org/programs/senior-services
5325 NE MLK Blvd., Portland
503.280.2600

YWCA-East County
www.ywcapdx.org
600 NE 8th St., Room 100, Gresham
503.721.6771

As the senior population in Multnomah County continues to grow, so too does the importance of programs like the Senior Law Project. The demand for pro bono legal services will only increase, making it more critical than ever for attorneys to volunteer their time and expertise.

A heartfelt thank you to all volunteers for your commitment to providing pro bono services. If you are interested in volunteering with the Senior Law Project, please contact marc.beck@lasoregon.org. ♦

Important Elder Law Numbers

Updated for January 1, 2025

Supplemental Security Income (SSI) Benefit Standards	Eligible Individual	\$967.00/month
	Eligible Couple	\$1,450.00/month
Medicaid (Oregon)	Asset limit for Medicaid recipient	\$2,000
	Burial account limit	\$1,500
	Personal needs allowance in nursing home	\$79.07/month – VA \$90/month
	Personal needs allowance in community based care	\$215/month
	Room & board rate for waived community based care facility	\$752
	OSIP Maintenance Standard for person receiving in-home services	\$1,467.00
	SSI only: \$989.00	
	Long Term Care Income Cap	\$2,901.00/month
	Community Spouse Minimum Resource Standard	\$31,584
	Community Spouse Maximum Resource Standard	\$157,920
	Community Spouse Minimum Monthly Allowance Standard	\$2,555.00/month
	Maximum Community Spouse Monthly Allowance	\$3,948.00/month
	Excess Shelter Allowance Amount Above	\$766.50/month
SNAP Utility Allowance Used to Figure Excess Shelter Allowance	\$502/month	
Average Private Pay Rate for Calculating Ineligibility for Transfer of Assets at less than Fair Market Value after October 1, 2022	\$14,585/month	
Medicare	Hospital Part A deductible per illness spell	\$1,676
	Skilled nursing facility co-insurance for days 21-100	\$209.50/day
	Part B premium (up to \$106,000 single and \$212,000 joint return):	\$185/month
	<small>(plus Income Related Monthly Adjustment Amount if modified adjusted gross income above threshold)</small>	
	Part B deductible	\$257/year
	Part D Premium	Varies by plan

*The need standard for an individual who receives in-home services is the OSIPM maintenance standard (\$967 per month in 2025) plus \$500, or \$1,467 per month for 2025. OAR 461-160-0620

**Home equity limit for an individual: \$730,000

***ABLE account contributions for 2025 are capped at \$19,000. The beneficiary can also contribute an additional amount that is the lesser of the beneficiary’s compensation for the tax year OR \$14,580 (continental US).



ELDER LAW SECTION NEWSLETTER COMMITTEE

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