



ESTATE PLANNING WORKSHOPS

Estate planning counsel offered to seniors

“Volunteer attorneys Natalie and Mike are making a huge difference, one client at a time.”

Natalie Kadievitch is an electrical engineer and a shareholder at Fredrikson & Byron, P.A., practicing in the area of intellectual property law. She also has a soft spot for elders. She and Mike Cummings, a Fredrikson associate who counsels clients in the energy industry, are the force behind a new pro bono partnership that provides estate planning services for some of the lowest-income people in the Twin Cities.

“You might think low-income people wouldn’t have estate planning worries,” says Mike. “But they do. Their belongings and their health decisions are a concern for them, just like anyone else.”

Working in partnership with MMLA’s seniors unit, the pair from Fredrikson provides full estate planning services—power of attorney, will and health care directive—to low-income seniors who attend MMLA’s community education sessions.

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“MMLA doesn’t provide estate planning documents,” explains Genevieve Gaboriault, Supervising Attorney of MMLA’s Senior Law Project. “Due to limited resources, it falls outside of our priority area. Instead, we refer people out to elder law attorneys who provide free services or charge on a sliding scale, but there are others who never make it to our offices, or who can’t get to clinics or a law office. We wanted to find a way to fill that gap.”

Matchmaking

Pam Wandzel, Pro Bono & Community Service Manager at Fredrikson, has watched the project grow from a seed planted when Genevieve first approached her about a partnership two years ago. Pam began looking for available attorneys, and Genevieve began searching for a structure to make it happen.

Genevieve worked with MMLA Pro Bono Director Kirsten Olson to identify a community site for the project, Park ElderCenter in downtown Minneapolis. “As a senior center primarily serving low-income Hmong and Somali elders, it was an ideal place to develop our two-step model,” says Genevieve. “We could provide community education sessions on site, and then have attorneys work one-on-one with anyone who wanted to get the paperwork done.”

By the time Genevieve came back to Fredrikson with a developed plan, Pam had found volunteer attorneys. “My job is all about timing and finding a fit,” Pam says. “One of the hardest things is to find a project that not only fits personal interests and passion, but also fits the attorneys’ schedules. Natalie came to me saying specifically that she wanted to work with elders. Mike had been working with the VA, and had been trained on wills for veterans. It was a perfect match. The monthly workshops are a discrete commitment, with boundaried time. Natalie and Mike get to work together, work closely with MMLA, and provide a service to the community.”

Since June of 2014, MMLA has given several presentations at Park ElderCenter, including language-interpreted talks to a Hmong group adult daycare and a Somali elder group. After the presentation, attendees were able to sign up for attorney help. To date, Natalie and Mike have served 24 clients. More than half of these were Hmong speakers.

“We provide interpreters who know the culture,” says Genevieve. “We also gave Natalie and Mike some culturally specific training so they had a better understanding of the client population.”

MMLA Legal Assistant Tou Lee works with the project as an interpreter, and he provided the cultural training. “The health care directive is the most important document for the Hmong elders,” he says. “When asked about organ donation and cremation, the answers were a big NO. They said, ‘In our culture, we are to be buried underground only.’ They wanted to be sure that was clearly stated in the document.”

Natalie and Mike have found that sitting with clients and listening to them carefully is a big part of the job.

“It’s a balance between efficiency and taking the time to listen,” says Natalie. “I enjoy hearing their stories and helping them accomplish something they didn’t know how to go about doing. Especially with the health care directives, you can see what a comfort it is to get their desires documented.”

“Estate planning isn’t an easy topic,” says Mike. “But together we get it done.”

Each client leaves with their documents completed and properly executed, with three copies in hand to give to family members or health care providers.

“By locating in a senior center,” says Genevieve, “we find the very lowest-income people who are unlikely to access legal services any other way. We bring the program to them, in their own language.”

Expanding the program

The team has served most of the interested clients at Park ElderCenter, so in May they’ll be relocating the program to the Minneapolis Public Housing Authority (MPHA) Heritage Park Senior Services Center. MMLA recently held two presentations there and received overwhelming interest from MPHA residents. Natalie and Mike are happy to see the program expand. They hope to become ambassadors, bringing in other attorneys while continuing to do the work themselves.

“When we have a positive, well-structured experience like this,” says Pam, “the lawyers become recruiters. There is definitely room for this project to grow.”

“The miracle of this project,” says Genevieve, “is having Natalie and Mike in from the start as trained, committed attorneys. They have gotten this thing rolling and they are making a huge difference, one client at a time.”