



CAPACITY SCENARIOS

Dr. Schultz's capacity evaluations can answer questions such as:

- An aging family member wants to change a will. Does the family member have the capacity to do so?
- Family members disagree on whether an older relative needs a guardian to be safe, and the elder does not think so. Who is correct?
- Is someone being taken advantage of financially, or can he/she still make reasonable decisions about finances?
- A patient was given a temporary guardian during a medical emergency, but now states that he can manage his life himself. Does this person have capacity to do so?



Amy Schultz, Ph.D.

Dr. Schultz is a licensed psychologist in Oregon and Washington. Her specialty is in clinical geropsychology (aging issues and brain function). She received her Ph.D. in clinical psychology from Arizona State University with a focus on health and geropsychology and completed postdoctoral training in geropsychology and geriatric neuropsychology through Harvard Medical School and the Boston VA Medical System. In 2004 she founded the OPAL Institute to collaborate with medical and legal professionals on capacity issues and best practices when assisting elders.



OPAL Institute

Oregon Passionate Aging and Living

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Will your decisions stand?



Prevention and protection are key factors to insure that your wishes are fulfilled.



OPAL Institute

Capacity Evaluation Services

Prevention and protection are key factors in making your decisions stand.



Amy Schultz, Ph.D.

Capacity Consultant and Expert Witness

Risk is real. Problems occur all too often when it comes to our final wishes. People make thoughtful decisions about the future of their assets and later fall prey to family controversy. Those final wishes, so carefully set down, may be destroyed due to a legal challenge.

Don't let this happen to you.

FOR ATTORNEYS

- Have you documented your client's capacity?
- How are you managing capacity-related risk?
- Does your team include a capacity expert?

FOR INDIVIDUALS & FAMILIES

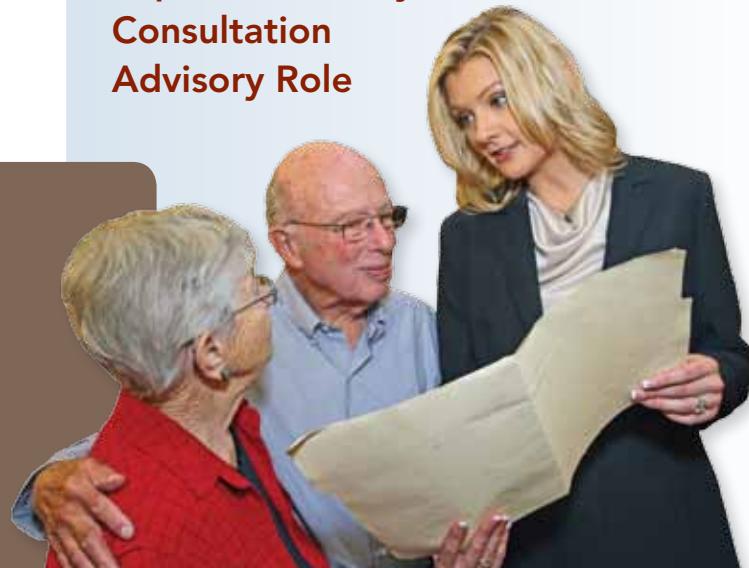
- Are you contemplating a change that might be challenged?
- Do you worry that your family may object to your decisions?
- Do you need help proving that you are in control of your life?

S E R V I C E S

Capacity Evaluations

- Two patient evaluation sessions (one to four hours for each session)
- Record review
- Clinical interview
- Collection and review of collateral information
- Cognitive and functional evaluation with age/education/culture-appropriate norms
- Written report with summary and capacity recommendations
- Prompt scheduling and turnaround

Expert Testimony Consultation Advisory Role



Dr. Schultz's services reduce your risk and increase your sense of security.