

Dear Ms. Shetty,

I am writing in support of HB 0320. I was one of the attorney's that represented Ms. Vess in her lawsuit against her uncle's financial advisor. I am in support of strengthening the law, as it relates to any influence that can be asserted by a financial advisor or someone with a confidential relationship, against an older/vulnerable individual. It is all too easy, for a vulnerable adult to be persuaded by a person whom they trust, to modify their financial documents and transfer their property to this person. Especially if there is isolation from their family or reliance solely on this other individual. Any transfers of assets, to someone with a close relationship, who is in a position of caregiving or financial capacity, needs to be highly scrutinized, to determine if there was undue influence. I support the proposed language in the HB 0320, as it provides more clarity for how these transactions should be reviewed and proving undue influence.

Thank you,

Rebekah

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