

**ETHICAL OBLIGATIONS  
IN MAINTAINING A  
PROFESSIONAL WILL**

American Board of Vocational Experts  
Friday, April 12, 2013  
Firesky Resort & Spa  
Scottsdale, Arizona  
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**Ethical Obligations in Maintaining a  
Professional Will**

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- Personal Wills
- Trusts
- Professional Wills

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- **Closing A Professional Practice:  
Clinical and Practical Considerations**  
By Catherine Selth Spayd, PhD and Mary O'Leary Wiley, PhD



Discussion: Other reasons than "retirement" occur to force one to close a practice, suddenly or over time.  
Let's discuss this and plan ahead to transition in a more controlled environment.

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- BLANK Professional Will
- DISCLOSURE:  
\*John Berg and Cynthia Grimley are not trained in accounting, law, or related. This template is a start to consider creating a will of your own and either retain a professional licensed to develop wills and related legal documents or purchase an on-line PW will for your practice.



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- **PROFESSIONAL WILL EXAMPLE:**
  - John Berg's own professional will (Copy write controls, see disclaimer).



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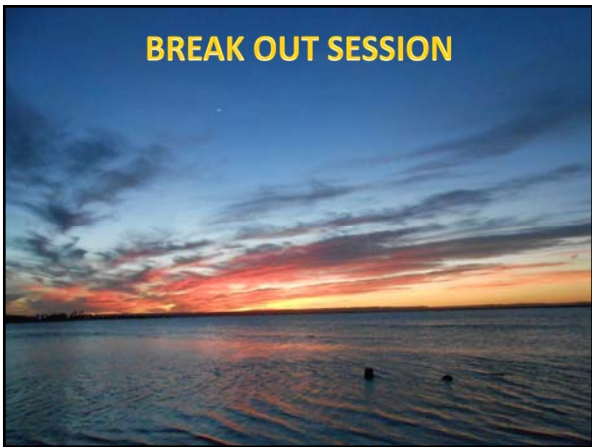
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**BREAK OUT SESSION**

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- Groups at table to review each of codes, list applicable codes, and choose a **SPOKESPERSON** to summarize findings and opinions to the audience.

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- ABVE - Codes of Ethics

What codes are applicable to Professional Wills?

**CONFIDENTIALTY**

Canon 5: R5.1, R5.2, R5.4

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- American Psychological Association (APA) Codes of Ethics

What codes suggest or require a Professional Will for Licensed Psychologists?

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### CRCC Codes of Ethics:

- Which codes apply to professional wills?
  - Section A: A.1 (a), A.4 (a), A.8 (a)
  - Section B: B.1. (b) and (c), B.3 (b), B.6 (a), (b), (c), (d), (e), (f)
  - Section F: F.3. (b)
  - Section H: H.1. (a)
  - Section J: J.3. (a), (b), (c); J.10. (c)
  - Section K: K.2. (a), (b), (c)

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### CCM Codes of Ethics:

- What codes apply to professional wills?
  - Section 4: S14, S17, S20

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### CDMS Codes of Ethics

- What codes apply to professional wills?
  - Section 1: RPC 1.10 a, b, c, d
  - Section 2: RPC 2.04

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Please take 10-15 minutes and start to write your own Professional Will using the Blank Template we have provided to you.

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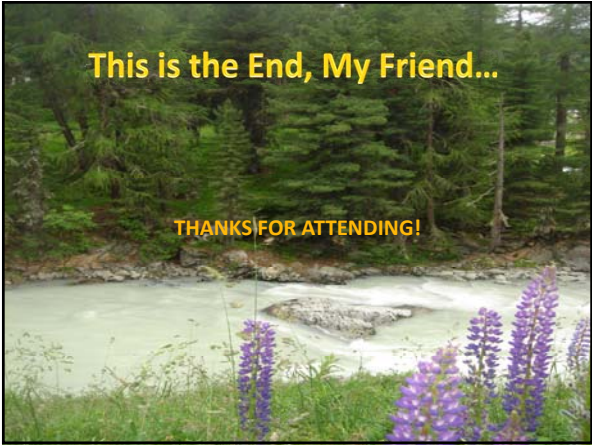
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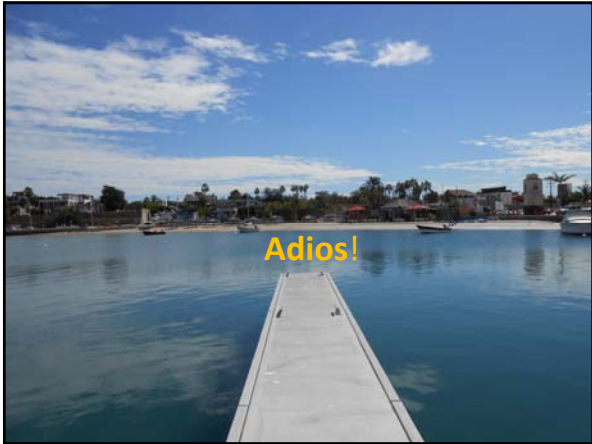
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