



2017 Lake Tahoe Fiduciary-Attorney Summit
South Lake Tahoe, CA

Maurice Kamins
The Incapacitated Adviser
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A FRESH LOOK AT THE 12 STEPS

1. WE HAVE POWER AND OUR LIVES ARE BECOMING MANAGEABLE.
2. WE BELIEVE IN A GREATER POWER, WHICH WE CALL OUR INNER SELF.
3. WE MAKE A CONSCIOUS DECISION TO TURN OUR WILL AND OUR LIVES OVER TO OUR INNER SELF
4. WE MAKE A SEARCHING AND FEARLESS INVENTORY OF OURSELVES.
5. WE ADMIT TO OUR INNER SELF AND OTHERS THE EXACT NATURE OF OUR STRENGTHS AND WEAKNESSES.
6. WE STRIVE TO STAY IN TOUCH WITH THIS INNER SELF AND IMPROVE OUR POTENTIAL FOR AUTHENTICITY.
7. WE ASK OUR INNER SELF FOR THE STRENGTH, COURAGE AND WISDOM NECESSARY FOR HEALING AND RECOVERY.
8. WE MAKE A LIST OF PEOPLE TO CONTACT WHO CAN HELP US DO THE WORK WE NEED TO DO AND CONTINUOUSLY WORK AT NOT HIDING FROM COMMITMENTS NOR ISOLATING OURSELVES IN RELATIONSHIPS OR FROM THE COMMUNITY.
9. WE MAKE DIRECT CONTACT WITH OTHERS INTERESTED IN CONTINUED GROWTH EXCEPT WHEN TO DO SO WOULD NOT ALLOW US ENOUGH TIME TO BE WITH OUR INNER SELF.
10. WE OBSERVE OURSELVES IN ALL SITUATIONS, GIVE OURSELF CREDIT WHEN WE HAVE DONE A GOOD JOB AND PROMPTLY ADMIT WHEN WE HAVE BEEN WRONG.
11. WE CONTINUE THROUGH CONSCIOUS REFLECTION TO IMPROVE CONTACT WITH OUR INNER SELF AND THE ABILITY TO SERVE OTHERS APPROPRIATELY, NOT WISHING FOR THE FUTURE NOR LOOKING TO THE PAST BUT REMAINING IN PRESENT TIME.
12. WE CARRY THIS AWARENESS IN ALL OUR AFFAIRS AND SHARE IT WITH OTHERS.

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A TIBETAN BUDDHIST POEM
AUTOBIOGRAPHY IN FIVE CHAPTERS

1. I walk down the street.
There is a deep hole in the sidewalk
I fall in.
I am lost... I am hopeless.
It isn't my fault.
It takes forever to find a way out.
2. I walk down the same street.
There is a deep hole in the sidewalk.
I pretend I don't see it.
I fall in again.
I can't believe I'm in the same place.
But it isn't my fault.
It still takes a long time to get out.
3. I walk down the same street.
There is a deep hole in the sidewalk.
I see it is there.
I still fall in. It's a habit.
My eyes are open.
I know where I am.
It is my fault
I get out immediately.
4. I walk down the same street.
There is a deep hole in the sidewalk.
I walk around it.
5. I walk down another street.

Source unknown
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LEADING FROM BEHIND™

Components

Use of paradox: have you thought of

Reflection:

Interpretation

Giving the individual power

Being non-judgmental

Avoid value laden words: should, ought

Avoid absolutes

4 aspects of empathic listening:

- desire to be other directed

- desire to be non-defensive

- desire to imagine the roles, perspectives and /or experiences of the other

- desire to listen as a receiver, not as a critic, and the desire to understand the other rather than to gain either agreement from or change in that person.

CLIENT RELATIONSHIP TRAINING

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SELF REFLECTION WORKSHEET

What did you learn about the client's style that will help you in your planning?

What did the client learn about your services?

Where you aware of interrupting? When were you most likely to interrupt?

Looking back are there any other questions you might have asked to help make the client more comfortable?

Do you remember any questions that you could have answered more thoroughly?

Did you give clarification when it was needed? Do you remember if there were any specific areas where you were hesitant in your responses?

Did you practice active listening? Examples:

Did you make eye contact with all of the people in the room?

Did you show that you were listening? What were the non-verbal and verbal cues that you used?

Where you able to lead from behind at any time in the conversation?

Did you get upset or annoyed in any way?

Was there any time that you felt distracted during the interview? What was going on in the conversation at that time?

What were some of the non verbal cues that you used to show the client that you were listening and attentive?

What would you do different during your next interview?

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PAST, PRESENT, FUTURE WORKSHEET

During the day, take a few minutes out and ask yourself the question: What percentage of my thoughts is on past events, on present events and on future events.

DATE/TIME	% TIME IN PAST	% TIME IN PRESENT	% TIME IN FUTURE

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Common Barriers to Active Listening

Mind reading what the talker really thinks.

Planning your rebuttal or story to give next while “listening” to the client. The Yes...But syndrome.

Comparing yourself to the client while the client is speaking.

Be careful that you don't start advising the client in areas that are beyond your personal area of expertise.

Filtering the conversation so that one hears only certain topics or doesn't hear critical remarks.

Judging a client. Thinking the statement is naive, trivial, hostile, etc. If you have prejudged someone, you will not pay attention to what they are saying.

Preparing your financial plan or advice long before the talker has finished telling his/her financial story.

Considering every conversation an intellectual debate with the goal of putting down the opponent.

Talking about your own experiences or the experience of one of your clients, instead of listening to the talker

Placating the client with lines such as: Really! Sure! You're so right, etc.

Believing you have a better answer than the clients. Your energy is focused on designing and developing your next comment, rather than listening to what the client is saying.

Changing the topic or laughing it off if the topic gets serious. This will derail the conversation and may be very upsetting to the client.

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DRUG RETENTION TIME

Alcohol/Ethanol (Blood/Breath) metabolized at the rate of 2/3 drink per hour

Amphetamines 2-3 Days

Benzodiazepines (Valium, Librium, etc.) 1-2 Weeks

Barbiturates

Long Acting (e.g. phenobarbital) 1-3 Weeks

Short Acting (e.g. secobarbital) 2-3 Days

Cocaine (Crack) 2-3 days

Marijuana (THC) (times are only approximations)

Infrequent smoker 4-5 days

moderate smoker days-weeks

chronic smoker weeks

Opiates (Codeine, Morphine, Heroin Dilaudid, Percocet, Demerol) 2-3 days

Phencyclidine 1-7 days

(PCP, Angel Dust) chronic use may be up to 30 days

These are only approximations for detection periods on a urine drug test.

Drug detection depends on amount of drug ingested, time since use, rate of an individual's metabolism, and amount of fluid intake. Because of these variables, times presented are only a general guideline.