

QUACK CARROL

After Mother had made changes to her Will with the new lawyer Fravel, Mother decided to hire a psychologist to confirm there was no doubt she knew what changes she made. His name was Dr. ken carrol. He came to her house, spent only one hour with her and charged her \$1,000. He claimed Mother was incapacitated. Just like ledakis, carrol never recorded his session to prove what he claimed about mother in his report. Somehow, weilheimer found out about it and used it against Mother. But, he was never called to the trail and so I could not expose his stupidity and incompetence of his "evaluation".

He did say Mother could come to court if she wanted. He used BS to say his report was only in his opinion. I knew mother best because I saw her every day for about 6 hours after my father died in 2013.

Report of Psychological Examination

Name: Jane Herring

Date: May 24, 2021

Date of Birth: May 16, 1925

Reason for Referral: Earlier this year, Mrs. Herring made some changes to her will and conveyed power of attorney exclusively to her son Arthur. Her daughter Jill, who had been sharing POA, objected, and raised concerns about Mrs. Herring's cognitive functioning and decision-making ability. As a result, Mrs. Herring's investments manager at the firm of Raymond James, refuses to honor the new POA. Her son Arthur has therefore requested a psychological examination.

Consent: I met Mrs. Herring at her home in Souderton today. Her son was there to introduce us but then went to a different part of the house, and the interview was conducted in private. I explained the purpose of my visit, Mrs. Herring agreed to participate, and signed a consent form.

History: Mrs. Herring grew up in the Germantown section of Philadelphia and graduated high school. She had limited work experience outside the home and was primarily a homemaker. She and her husband and two children, and he died in 2013.

The Environment: The home is in very good condition inside and out.

Health and Appearance: Mrs. Herring looks much younger than her years. She was clean, neatly dressed, and appears to be healthy. She had no difficulty ambulating. No physical abnormalities were noted. Vision and hearing were adequate.

Cognitive functioning:

Attitude, attention, and focus: Mrs. Herring was alert, clear, coherent, and friendly. She was somewhat anxious about the evaluation, but she was fully cooperative and had no difficulty maintaining attention.

Language: Mrs. Herring speaks clearly and fluently, with normal rate and rhythm, and correct syntax and grammar. She has no difficulty expressing herself.

Memory and Orientation: Mrs. Herring was fairly well oriented to place, although she could not recall the name of her town. She was poorly oriented to time. Remote memory appears to be intact. She could recall the basic facts of her history, although she was a little inaccurate about more recent events. She could not recall, for example, when her husband passed away, and guessed it was 11 or 12 years ago. Short-term recall was poor. She could not remember any of three words after a minute and did not improve with prompting, although she did recall two of the words when given multiple choice. Her score on the Folstein Mini Mental State Exam was 21 of a possible 30, clearly in the range of major neurocognitive impairment.

Mrs. Herring was asked a few questions from the Comprehension subtest of the Wechsler Intelligence Scales. These assess judgment and reasoning ability, and she had difficulty with them. She could not explain why deaf people have difficulty learning to talk, or why we have to cook our food.

Health Awareness: Mrs. Herring was able to name her physician. She said she has no significant health problems. (I have no independent information about her health.)

Financial Awareness: She knows little about her finances. She cannot estimate her monthly income or her expenses, though she reported that she pays all the bills herself from her checking account. Her son later told me that most of the regularly occurring bills are paid automatically. He also told me that she gives \$14,000.00 annually of each of her children. She did not recall that, even with some prompting. She could not estimate her total worth, could not even offer a guess. Her son estimates the house is worth about \$350,000, and Zillow has it at \$385,000. She guesses "it *might* be worth \$50,000."

Legal Issues: Mrs. Herring had a poor understanding of the concept of power of attorney: "It's hard to explain. There are people in government and in individual living. You need to have a leader." I offered a brief definition and asked her to repeat it, but her response was closer to a definition of executor. I gave her the definition again, fleshing it out with concrete examples from my experience with my own parents, and she finally seemed to understand on the fourth try.

I asked if she had made any changes to any legal document in the past year, and she did not recall at first. But with further discussion, when asked specifically about her will, she remembered, "It was something divided equally. Then I changed it. Arthur is the main one now." She estimates she made the change about two years ago.

Other Mental Health Factors: Mrs. Herring was a little anxious, not inappropriately so. She denied any history of mental health treatment. She denied any history of suicidal ideas or passive death wish. She denied that she has ever had hallucinations. There was no evidence of delusional ideas or formal thought disorder.

Substance Use: Mrs. Herring reports she does not use alcohol.

Abuse History: She denies she has ever been abused in any way.

Insight: Mrs. Herring has some insight. She knows her memory fails her sometimes, but she minimizes that.

Diagnostic Impression: Major neurocognitive disorder (that is, dementia, probably due to Alzheimer's disease).

Discussion: Mrs. Herring has significant cognitive impairment, which limits her ability to recall and integrate information, to assess her circumstances accurately, to consider

Executive Function: This term refers to a higher-level set of cognitive processes that is responsible for organizing and coordinating sensory input, memory, and lower level cognitive functions. Put simply, executive function is the ability to entertain multiple ideas simultaneously, to weigh one thing against another. It is essential for interpreting information, discovering rules and patterns, reconciling inconsistencies, making decisions, planning, adapting to change, and initiating action. Difficulty in this area can be subtle but profoundly disabling.

Abstract reasoning - the ability to manage complexity, see beyond details, make connections, and find commonality - is an important manifestation of executive ability. On the Wechsler Similarities Test (Sample question: "How are an orange and a banana alike?") her score was 12, about average for her age.

But when asked to interpret proverbs, a less structured measure of abstract reasoning and facility with nonliteral language, she did not fare as well. She was asked to interpret *Don't judge a book by its cover*, and started out reasonably well, but could not maintain focus and her effort deteriorated:

A: Not to over...not to ignore...Find the base. Not to accept the first thing without thought.

Q: Does this apply just to books?

A: No...Anything you find that you'd be doing

Q: Does it apply to people?

A: It could

Q How so?

A: If you're thinking of a change. Anything... a thought process.... sometimes it doesn't apply purposely, it's just what comes to your thought.

When asked to draw a clock, she had difficulty placing the numbers and was stymied when directed to place the hands to read "ten after eleven." She struggled with this for a few moments, and then wrote an additional 10 and 11 between the 12 and the 1.

Mrs. Herring was given the Animal Naming Test, which assesses verbal fluency, semantic memory, and the brain's ability to make associations and devise organizing schemes. On average, people name 24-25 animals in a minute. Scores below 14 are considered indicative of dementia. She could name 6 animals. No organizing scheme emerged.

She was given the Trails Making test, a connect-the-dots task in two parts. The first involves connecting numbered circles in correct numerical order. The second and more difficult part requires alternating between numbers and letters, i.e., 1, A, 2, B, 3, C...etc. This requires simultaneous attention to two parallel but separate processes. She completed the first part, but could not retain the rule on the second part and could not complete a short practice test, even when given guidance.

options, to adapt to change, to make decisions, to have the judgment needed to make plans, and the initiative to carry them out.

I believe that Jane Herring is an incapacitated person. She is unable, in a consistent, sustainable manner, to receive information, evaluate it rationally, and make sound decisions.

Recommendations: To ensure her health, safety, and financial security, I believe Jane Herring needs the guidance of a guardian, of both her person and her estate.

➤ I do not believe she has the cognitive capacity to convey power of attorney, and I believe it is very unlikely she had that ability six months ago.

➤ I do not believe she would be harmed by attending court proceedings related to her competency.

➤ The statements and conclusions offered herein are made with a reasonable degree of scientific certainty.

Kenneth R. Carroll Ph.D.

**Kenneth R. Carroll, Ph.D.
229 Cornell Avenue
Swarthmore, PA 19081
Phone/Fax 610 328 6768**