



## Risky Business

Legal/Ethical Case Studies for Your Classroom  
Session Length/Type: 60-Minute / Lecture and Q&A  
Saturday October 17, 2009, 5:30pm - 6:30pm  
Session Description

The real world of counseling practice can be risky. Two case studies based on a number of real life licensure board complaints and lawsuits will be offered for discussion. Utilizing an ethical decision-making model, counselor educators will learn to more effectively field complex legal/ethical questions around areas of: 1) privacy, privilege, and confidentiality (including subpoenas); and 2) boundary violations. The case studies can be used when teaching ethics or providing clinical supervision.

### Burt Bertram, Ed.D., LMHC, LMFT

#### Summary of experience relevant to topic

Burt Bertram has been in practice in Orlando, Florida since 1972. His practice is a unique combination of clinical counseling (individuals, couples and families); organization consulting (facilitation of team dialogue, planning, and conflict resolution); and staff development training. Additionally, he is adjunct faculty in the Graduate Studies in Counseling Program (CACREP) at Rollins College where he teaches ethics, consultation, couples and family counseling, and supervises both practicum and internship students. Within ACA, Burt has been president of the Florida Counseling Association, the Florida Mental Health Counselors Association, and member and Chair of the ACA Insurance Trust.

### Anne Marie "Nancy" Wheeler, JD

#### Summary of experience relevant to topic

Nancy is an attorney in private practice who represents counselors, physicians, mental health professionals and other health care clients on state and federal legal and regulatory matters and licensure board complaints. She has extensive experience in managed care contracting, licensure and health care privacy issues, including "HIPAA". Nancy has worked with ACA and the ACA Insurance Trust for many years and currently serves as the Coordinator of the Trust's Risk Management Helpline. She is an affiliate faculty member in the Graduate Pastoral Counseling Program of Loyola College in Maryland, where she teaches Legal, Ethical and Professional Issues.

Nancy and Burt have lectured, together and separately, across the country on legal, ethical and risk management issues for counselors. They are co-authors of *The Counselor and the Law: A Guide to Legal and Ethical Practice* (ACA, 2008).