2011 Special Needs Trusts
The National Conference

October 19, 2011
Pre-Conference:
The Elder Law Team

Pre-Conference:
The Basics for Pooled Trust Administrators

October 20, 2011
Basics of Special Needs Trusts

October 21, 2011
2011 Special Needs Trusts

Loews Don CeSar Hotel
St. Pete Beach, Florida

STETSON UNIVERSITY

Center for Excellence in Elder Law

ACCESS AND JUSTICE FOR ALL®

WEDNESDAY, OCTOBER 19, 2011

7:30 a.m.–6 p.m., *Buena Vista (Fifth Level)*
Registration Desk Open

PRE–CONFERENCE: THE ELDER LAW TEAM

8–8:30 a.m., *King Charles (Fifth Level)*
Continental Breakfast and Visit Sponsors & Exhibitors

8:30–8:40 a.m., *South Terrace (Fifth Level)*
Welcome and Announcements
Speaker: Professor Rebecca C. Morgan

8:40–9:15 a.m., *South Terrace (Fifth Level)*
The Lawyer–Staff Team: What the Lawyers Need the Staff to Know
Speakers: Robert B. Fleming and Roberta K. Flowers

The presenters in this session will cover the issues that staff need to know from the lawyer's perspective, including office goals and operations, ethical issues the attorney faces when supervising staff, and common ethical mistakes staff may make in going about their jobs.

9:15–9:45 a.m., *South Terrace (Fifth Level)*
The Judge and the Elder Law Staff
Speaker: Hon. David A. Demers

Judge Demers will discuss the line between attorneys and staff when interacting with the courts, and how staff can cross that line without recognizing it.

9:45–10:35 a.m., *South Terrace (Fifth Level)*
The Staff Team
Speaker: Dean Susan Demers

For an office to function effectively, the staff must function as a team. Dean Demers will cover interpersonal relationships and office dynamics and offer tips on enhancing teamwork and meshing personalities.

10:35–10:50 a.m., *King Charles (Fifth Level)*
Visit Sponsors & Exhibitors

10:50–11:45 a.m., *South Terrace (Fifth Level)*
Staff Working with Clients (Part 1)
Achieving Success: Working with Unstable Families and Difficult Beneficiaries
Speakers: Wil A. McCormick and Ruthann P. Lacey

The focus of this session is the legal team working through circumstances dealing with unstable families and difficult beneficiaries whether dysfunctional, struggling together to cope or in the process of breaking apart. We look at situations regarding newly injured beneficiaries, "seasoned" beneficiaries, and beneficiaries at the end of their lives.

11:45 a.m.–12:15 p.m., *South Terrace (Fifth Level)*
Staff Working with Clients (Part 2)
Care Managers/Case Managers to Clients
Speaker: Linda R. Chamberlain

This session will explore the use of professional geriatric care managers and case managers as part of the team and how the care/case managers can work with clients in an effective and successful way.

12:15–12:45 p.m., *South Terrace (Fifth Level)*
Getting Services for Beneficiaries in Times of Tight Budgets
Speaker: Stephen W. Dale

This session will offer suggestions and examples on how trustees can access programs and find services for their beneficiaries in light of budget cuts and program cuts. Some of the lesser known programs and privately funded programs will be reviewed in this session.

12:45–1:15 p.m., *South Terrace (Fifth Level)*
What Challenges are Facing the Elder Law Team?
Speaker: Roberta K. Flowers

The audience members will divide into small groups based on their job descriptions to discuss the challenges they face and share tips to improve the working relationship between the members of the elder law team.

Lunch on Your Own *(Visit the Don CeSar's restaurants)*

PRE–CONFERENCE: THE BASICS FOR POOLED TRUST ADMINISTRATORS

1–1:30 p.m., *King Charles (Fifth Level)*
Visit Sponsors & Exhibitors

1:30–1:40 p.m., *South Terrace (Fifth Level)*
Welcome and Announcements
Speaker: Professor Rebecca C. Morgan

1:40–2:30 p.m., *South Terrace (Fifth Level)*
Record Keeping and Accounting for Pooled Trusts
Speaker: Heather Nadler

This session will look at the laws and regulations on accountings and record keeping for pooled trusts, including those reports for beneficiaries, trustees, guardians, agencies and courts.

2:30–3:20 p.m., *South Terrace (Fifth Level)*
Pooled Trusts: Conflicts and Potential Conflicts
Speakers: Janet L. Lowder and Elena A Lidrbauch

A pooled trust must be cognizant of actual and potential policies conflicts, whether with board members or fee issues, and, must be developed to avoid conflicts and deal with those that occur. The presenters will also cover drafting and implementing grievance policies for beneficiaries to use.

3:20–3:40 p.m., *King Charles (Fifth Level)*
Casey's Cookies Break and Visit Sponsors & Exhibitors
Join us for cookie break and support the work of Casey's Cookies. Casey's Cookies is a 501c3 Florida Non-Profit that trains developmentally and physically disabled adults and then employs them to bake premium cookies so they can become contributing members of society and enjoy a higher quality of life. Visit www.caseyscookies.org for more information.

3:40–4:40 p.m., *South Terrace (Fifth Level)*
Annual Update on SSI and Medicaid Policies
Speaker: Neal A. Winston

The SSA has an explicit (but complicated) set of rules and rulings about the relationship of SSI to d4C pooled trusts. Centers for Medicare & Medicaid Services is less clear about its position on certain pooled trust policies, and often state Medicaid agencies make their own policy. This session discusses the definite (and not-so-definite) issues and changes that have come up over the past year for pooled trusts for the two programs on the national and regional levels.

4:40–5:30 p.m., *South Terrace (Fifth Level)*
Advocacy in This Economy
Speakers: Stephen W. Dale and Heidi J. Flatt

This session will offer suggestions and examples on how trustees can advocate for their beneficiaries in light of budget cuts, elimination of programs and services, and longer waiting lists.

THURSDAY, OCTOBER 20, 2011

8 a.m.–5 p.m., *Buena Vista (Fifth Level)*
Registration Desk Open

8–10 a.m., *Ballroom Arcade (First Level)*
Satellite Information Desk

BASICS OF SPECIAL NEEDS TRUSTS

7:30–8:40 a.m., *King Charles (Fifth Level)*
Continental Breakfast and Visit Sponsors & Exhibitors
Sponsored by Wolters Kluwer Law & Business.

Join Wolters Kluwer Law & Business for a special "Meet the Authors" session! This is your opportunity to meet Robert Fleming, author of The Elder Law Answer Book and Tom Begley, author of Representing the Elderly Client and Special Needs Trusts. Stop by, and get your questions answered personally by these experts.

8:40–8:45 a.m., *Grand Ballroom (First Level)*
Welcome and Announcements
Speaker: Rebecca C. Morgan

8:45–9:35 a.m., *Grand Ballroom (First Level)*
History of Special Needs Trusts
Speaker: Craig C. Reaves

Everyone has heard about trusts, but what about the elements of the trust? This session will cover basic trust law, what is needed to create a trust, and the issues that must be considered and resolved in drafting a trust.

9:35–10:25 a.m., *Grand Ballroom (First Level)*
The POMS We All Know and Love
Speaker: Robert B. Fleming

This session will examine the SSA Program Operations Manual System (POMS), the application to an SNT practice, and the more commonly used POMS provisions, as well as how to read and apply them.

10:25–10:50 a.m., *King Charles (Fifth Level)*
Break and Visit with Sponsors & Exhibitors
Sponsored by NYSARC, Inc. Trust Services.

10:50–11:50 a.m., *Grand Ballroom (First Level)*
What Could Possibly Go Wrong? The Problems and Pitfalls of SNTs
Speaker: Mary Alice Jackson

This session will examine the problems that have occurred when SNTs have not been recommended to clients—including malpractice claims against the attorneys—and some of the more common pitfalls in using SNTs.

11:50 a.m.–12:55 p.m., *Pavilion West (Poolside)*
Networking Lunch
Come prepared to network with your colleagues and our sponsors and exhibitors. Alternate weather location is the Grand Ballroom.

1–1:50 p.m.
Breakout Sessions
The Most Basic Session of All–Public Benefits and SNTs, *South Terrace (Fifth Level)*
Speaker: Neal A. Winston

This session will cover the eligibility criteria and effects of income and distributions from SNTs on public benefit programs, particularly Social Security, SSI, Medicaid, subsidized housing, and Food Stamps.

WSNT Talk Radio: Family Conversations, *North Terrace (Fifth Level)*
Speakers: Richard A. Courtney and James A. Caffry

Families of children or adults with special needs must have conversations with the SNT attorney and with other family members about decisions and the future. This session will look at these conversations from the role of the attorney as well as the parents of children with special needs.

Words and Music: Implementing the Words of the Trust, *Del Prado (Fifth Level)*
Speakers: G. Mark Shalloway and Susan Mesenbrink

The SNT is more than just the words on the page. This session will look at the words used in the SNT and how the Trustee implements those words to give them meaning.

1:55–2:45 p.m.
Breakout Sessions
Taxation of SNTs–Plain and Simple (maybe some not so plain and simple), *South Terrace (Fifth Level)*
Speaker: Bradley J. Frigon

This session is about tax issues regarding SNTs. It is a basic session that will review the IRS code and regulations that apply to SNTs. Yes, it is about taxes, but that does not mean it can't be a little fun.

Top 10 Tips for Drafting the Flawless First–Party Special Needs Trust, *Del Prado (Fifth Level)*
Speaker: Laurie Hanson

This session will cover the elements of the first-party SNT and explain the uses, criteria and implementation of a first-party SNT.

Administration Ins and Outs, the Dos and Don'ts, *North Terrace (Fifth Level)*
Speakers: Ruthann P. Lacey and Heather Nadler

After the SNT is drafted, fully executed and has achieved agency approval, proper administration is absolutely critical in order to achieve its intended purpose for the beneficiary. This session covers the best practices for properly administering the SNT and identifies and addresses how to avoid some commonly made errors and omissions in SNT administration.

2:50–3:40 p.m.

Breakout Sessions

Drafting Redux: Special Needs, Special Words, *South Terrace (Fifth Level)*
Speaker: Janet L. Lowder

Although an SNT is a trust, it is a special type of trust designed to provide for the needs of a beneficiary with special needs. This session will examine the drafting of an SNT and how to draft the trust so it not only qualifies as an SNT, but contains provisions to allow the trustee to provide for the special needs of the beneficiary.

Ethical Issues for Attorneys and Practical Solutions, *Del Prado (Fifth Level)*
Speaker: Roberta K. Flowers

This session will look at the common ethical issues encountered in a SNT practice, examine the applicable rules, and offer practical solutions for avoiding and responding to those ethical matters.

What You Need to Know About Third-Party SNTs, *North Terrace (Fifth Level)*
Speaker: Vincent J. Russo

This session will cover the elements of the third-party SNT and explain the uses, criteria and implementation of a third-party SNT.

3:40–4 p.m., *King Charles (Fifth Level)*

Break and Visit Sponsors & Exhibitors

Sponsored by Family Network on Disabilities Special Needs Trust Administration

4–4:40 p.m., *Grand Ballroom (First Level)*

Understanding SSA Disability Determinations and Navigating the Application and Appeals Process

Speaker: Lloyd King

A former Social Security administrative law judge, Lloyd King will explain SSA's decision-making process and appeals procedures from his viewpoint and experience all in 40 minutes.

4:40–5 p.m., *Grand Ballroom (First Level)*

Question-and-Answer Session

Speakers: James A. Caffry, Roberta K. Flowers, Laurie Hanson, Mary Alice Jackson, Lloyd King, Ruthann P. Lacey, Janet L. Lowder, Vincent J. Russo, G. Mark Shalloway and Neal A. Winston

5 p.m., *Executive Boardroom #1 (First Level)*

Friends of Bill W.

5–6:30 p.m., *King Charles (Fifth Level)*

Reception

Sponsored by Loews Don CeSar Hotel.

LOEWS
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ST PETE BEACH

FRIDAY, OCTOBER 21, 2011

7–8 a.m., Beach

Tai Chi

Taoist Tai Chi is a series of slow movements that promotes health, balance and stress reduction through continuous gentle stretching and turning. The Taoist Tai Chi Society is an international charitable organization composed primarily of volunteers who are dedicated to sharing the health improving qualities of Tai Chi with others. Alternate weather location is the 5th floor lobby.

7:30 a.m.–5 p.m., *Buena Vista (Fifth Level)*

Registration Desk Open

7:30–10 a.m., *Ballroom Arcade (First Level)*

Satellite Information Desk

2011 SPECIAL NEEDS TRUSTS

7:30–8:45 a.m., *King Charles (Fifth Level)*

Continental Breakfast and Visit Sponsors & Exhibitors

Sponsored by Wolters Kluwer Law & Business.

Join Wolters Kluwer Law & Business for a special "Meet the Authors" session! This is your opportunity to meet Robert Fleming, author of The Elder Law Answer Book and Tom Begley, author of Representing the Elderly Client and Special Needs Trusts. Stop by, and get your questions answered personally by these experts.

8:45–9 a.m., *Grand Ballroom (First Level)*

Welcome and Announcements

Speaker: Rebecca C. Morgan

9–9:50 a.m., *Grand Ballroom (First Level)*

Update from SSA

Speaker: Eric R. Skidmore (by video conference)

This session will provide an update from the SSA by Eric Skidmore, team supervisor of Deeming, Income,

Resources and State Supplementation Team with the Office of SSI and Representative Payee Policy.

9:50–10:10 a.m., *King Charles (Fifth Level)*

Break and Visit Sponsors & Exhibitors

Sponsored by Trust Employee Administration & Management

10:15–11:05 a.m.

Breakout Sessions

SNTs and Retirement Benefits, *South Terrace (Fifth Level)*

Speaker: Laurie Hanson

This session will explore how various retirement benefits interface with first- and third-party SNTs, and will propose discussion language to be included in the trust documents and beneficiary designations, should a person on needs-based benefits be the owner or beneficiary of a retirement benefit.

Trust Protectors: Should You Use Them? *Del Prado (Fifth Level)*

Speaker: Craig C. Reaves

This session will provide an analysis of options available when considering the use of a trust protector. Topics include how to decide what powers to grant the trust protector, who should serve, and how to design the trust protector provisions to accomplish the objectives (while not needlessly exposing the trust protector to liability).

The Affordable Care Act: What Attorneys and Trustees Need to Know, *North Terrace (Fifth Level)*

Speakers: William Browning and Mary Alice Jackson

The ACA makes many changes to Medicaid. This session will discuss those changes, what the impact will be on SNT beneficiaries and their families, and what SNT practitioners need to know about these upcoming changes.

11:10 a.m.–12 p.m.

Breakout Sessions

Family Catastrophes, Trustees and Trust Administration, *South Terrace (Fifth Level)*

Speaker: Patricia F. Sitchler

Life happens. Natural disaster and a whole host of things may happen. The SNT attorney needs to be aware of, and prepare for, the variety of catastrophes that may occur to the family of an SNT beneficiary, including a parent losing a job or unemployment benefits, a parent falling ill, the home being foreclosed on, an upside-down mortgage, and more. This session will offer various case studies of family catastrophes, the impact on the trustees, trust administration and the beneficiary, and possible solutions.

When the Trustee Hires Others: Thinking About and Drafting Employment Agreements, *Del Prado (Fifth Level)*

Speaker: Lauchlin Waldoch

This session will examine the issues that must be covered when a trustee hires others to provide services to a beneficiary, including background checks, insurance, services, taxes, liability to the trustee and others and considerations in drafting these agreements.

SNTs and the Grantor Trust Rules, *North Terrace (Fifth Level)*

Speaker: Lawrence Eric Davidow

This session will cover the grantor trust rules including how grantor trust rules work with third-party trusts, what it actually means to be QDTs, the tax treatment, the IRS allowing continued tax deferral for IRA transferred to an SNT, and the PLR on the first-party SNT, as the owner of an IRA.

12–1 p.m., *Pavilion West (Poolside)*

Networking Lunch

Come prepared to network with your colleagues and our sponsors and exhibitors. Alternate weather location is the Grand Ballroom.

1:15–2:05 p.m.

Breakout Sessions

Minor Beneficiaries, Growing Up and Going to Work: Child Benefits, Aging Out and Working Beneficiaries, *South Terrace (Fifth Level)*

Speaker: David J. Lillesand

This session will examine the issues presented, the changes in programs, and what the SNT attorney needs to know.

The Changing Law and Regulations: State Statutes and Regional Decisions, *North Terrace (Fifth Level)*

Speakers: Scott C. Suzuki, Patricia F. Sitchler and Jason A. Frank

This session will provide an overview of the regional decisions, how what happens in one region seems to "creep" over into other regions, what statutes are being enacted, the pros and cons of those statutes, and what the SNT practitioner and trustee needs to know about these changing laws and regulations.

The Role of Life Care Plans in SNTs and MSA Calculations, *Del Prado (Fifth Level)*

Speaker: Janet L. Lowder

Life care plans play an important role in the settlement of a personal injury case, but the plans also have an important role in the SNT administration and the calculations for MSAs. This session will examine that role and how the drafting attorneys and the trustees must keep life care plans in mind.

2:10–3 p.m.

Breakout Sessions

Drafting a Medicare Set-Aside Subtrust into the SNT, *South Terrace (Fifth Level)*

Speaker: Bradley J. Frigon

SNT attorneys need to pay careful attention when Medicare Set-Aside (MSA) is created for a beneficiary receiving means-tested public benefits. This session will look at drafting considerations when you need to incorporate a MSA allocation as part of a first-party SNT.

Using Technology to Enhance Independence, Safety and Quality of Life for Beneficiaries, *Del Prado (Fifth Level)*
Speaker: G. Mark Shalloway
There are an increasing number of ways that technology can be used for beneficiaries to enhance independence, safety and overall quality of life. How can a trustee know about the technology, and more importantly, how is technology paid for? This session will look at a number of different approaches and how the trustee can learn more.

Splits, SNTs and Public Benefits: An Overview of Special Needs Planning in Family Law, *North Terrace (Fifth Level)*
Speaker: Scott C. Suzuki
This session will provide an overview of the issues that may arise in divorce cases in which a party has special needs or disabilities, and will discuss advocacy opportunities associated with alimony, child support and long-term care.

3–3:30 p.m., *King Charles (Fifth Level)*

Break and Visit with Sponsors & Exhibitors

Sponsored by Trust Employee Administration & Management.

3:30–4:30 p.m., *Grand Ballroom (First Level)*

Tips and Trends in the SNT Practice—The 2011 Update

Speaker: Robert B. Fleming
This session will look at the past year's developments, both through case law, statutes, regulations and administrative developments, and offer tips for the SNT practitioner and trustee in dealing with these trends.

Stetson Law Conference Staff

If you need assistance, please stop by the registration desk and ask for any of our Stetson conference staff:

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Trust Employee Administration & Management (TEAM)
8530 La Mesa Blvd., Suite 200, La Mesa, California 91942
Contacts: Art Candland, Terry Keating, Sharon Novak J.D. or Cheryl Doss
Phone: 877-767-8728 or 619-281-1100 Fax: 619-281-1926
Web: www.rmstrategy.com

Risk Management Strategies, Inc. d/b/a Trust Employee Administration and Management (TEAM) was formed in January 2003 by Arthur D. Candland and Terence J. Keating to provide employer-related services and to assume employer-related liabilities to the trust industry. With over 50 years of combined experience in employee benefits, risk management and employee staffing, The TEAM system allows you to manage your fiduciary responsibilities with the confidence that employee issues–including payroll, compliance, background checks, and national workers' compensation plan–are monitored and managed by experienced professionals. TEAM also has a national group health plan for all parents and dependent children, including disabled beneficiaries.

Gold Sponsors (in alphabetical order)

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Family Network on Disabilities Special Needs Trust Administration
2196 Main Street, Suite K, Dunedin, Florida 34698
Contact: Richard La Belle
Phone: (800) 825-5736
Web: www.fndusa.org

Family Network on Disabilities provides comprehensive special needs trust services, including service as a trustee, co-trustee or trust administrator. We handle all types of special needs trusts, including pooled trusts. Family Network serves as trustee for the Family Network on Disabilities National Pooled Trust, proudly serving persons with disabilities since 1999. We also serve as administrators for several other pooled trusts, including FND's Family Pooled Fund of third-party trusts, as well as many individual special needs trusts. We provide comprehensive trustee services, pre-settlement consultation and planning, and coordination of money management and custodial functions. Our core values are transparency, accountability, service and stability. Family Network on Disabilities is a national network of families and individuals of all ages who may be at-risk, have disabilities, or have special needs, and their families, professionals and concerned citizens. We are a grass roots organization with more than 25 years of service to the disability community.

NYSARC, Inc. Trust Services
318 Delaware Ave., Suite 22, Delmar, New York 12054
Contact: Heidi J. Flatt, CPA
Phone: 518-439-8323 ext. 353 Fax: 518-439-2670
Web: www.nysarctrustservices.org

NYSARC, Inc. Trust Services' mission is to create the opportunity, through the administration of a family of supplemental needs trust programs, for persons with a disability to remain in their natural home setting for as long as possible while maintaining their eligibility for community Medicaid or other government benefits. NYSARC, Inc. is committed to enhancing not only the desired quality of life for persons with disabilities and their families, but in promoting autonomy, maximizing the development of individual skills, and fostering integration into the community. In response to growing concerns commonly expressed by parents and others for safeguarding the personal and financial future of persons with intellectual and other developmental disabilities, NYSARC, Inc. established the NYSARC Unrestricted Trust Fund on July 19, 1972. The NYSARC, Inc. Community Trusts were established in 1997. In 2008, NYSARC began administering individual supplemental needs trusts as successor and initial trustee.

Exhibitors *(in alphabetical order)*

Academy of Special Needs Planners

150 Chestnut Street Box 15, Providence, Rhode Island 02903
Contact: Jacqueline Dias
Phone: 866-296-5509 Fax: 401-351-2642
Web: www.specialneedsplanners.com

The Academy of Special Needs Planners (ASNP) is a national membership organization that specializes in providing special needs planning attorneys with the educational, information and practice support they need to best service their special needs clients. The ASNP is the premier association for attorneys providing planning services to people with special needs and their families. As the largest membership organization solely for attorneys who provide planning services to people with special needs, ASNP consists of more than 200 member attorneys. The organization was established in 2006 to help attorneys provide their clients with the best planning services by improving their practices through involvement in a community of their peers.

Amramp

202 W. 1st Street, South Boston, Massachusetts 02127
Contact: Barbara Gayton
Phone: 800-649-5215
Web: www.amramp.com

Amramp helps people with limited mobility stay safely in their homes for as long as possible. Amramp provides safe access in, out and around the home with our Amramp modular wheelchair ramps, portable showers, the all-encompassing HomeNest® system-and other accessibility solutions. Our accessibility experts will personally visit the home and provide a free evaluation. Our products are also available for rent, which is great for short term disabilities, travel or apartments. Amramp modular wheelchair ramps are designed with safety in mind, with a unique open mesh, non-skid surface to allow moisture to pass through, minimizing dangerous ice film or mold build-up. Unlike wood or aluminum ramps, our steel ramps are fireproof, allowing for a safe exit in case of fire. Amramp now proudly carries an expanded line of accessibility equipment, including portable showers, automatic door openers, vertical platforms lifts, threshold and entry ramps, inclined stair lifts, portable ramps inclined platform lifts, pool lifts, overhead patient lifts, grab bars, wireless alert devices and more. HomeNest® is a patent-pending system of equipment and the services of a professional caregiver to offer your clients a safe alternative to a nursing home and keep them in their home and with the family they love.

ElderCounsel, LLC

P.O. Box 13, Sisters, Oregon, 97759
Contact: John Shickich
Phone: 888-789-9908 ext. 85 Fax: 888-320-6782
Web: www.eldercounsel.com

ElderCounsel is a membership organization that helps elder law and special needs planning attorneys across the country become more efficient and profitable through our top-notch document drafting system, education and member support.

Guardian Trust

901 Chestnut Street, Suite C, Clearwater, Florida 33756
Contacts: Travis Finchum or Steven Hitchcock
Phone: 800-669-2499 Fax: 727-631-0970
Web: www.guardiantrusts.org

The Trustees of the Guardian Trust are the Premier Special Needs Trust Administrators in the United States, and administer all forms of Special Needs Trusts. The Trust's founders identified the need for professional, responsive and client centered Special Needs Trusts. Established by the charity National Non-Profit for Americans with Disabilities, Inc. (NNAD), Guardian Trust was created for the sole purpose of helping people with disabilities manage their finances while financially qualifying for Public Assistance Programs such as Medicaid and Supplemental Security Income (SSI). Guardian Trust has been serving beneficiaries and their families for over nine years and is proud of the level of customer service and satisfaction that has been provided. There is professional supervision over of all of the Trusts as well as professional liability insurances covering errors and omissions and theft of funds. An independent CPA auditing firm conducts an audit of all procedures and accountings annually. We truly believe we are here to serve our beneficiaries.

Home Modification Solutions, Inc.

15339 Corter Boulevard, Brooksville, Florida 34613
Contact: Jennifer Myers
Phone: 866-939-6637
Web: www.homemodificationsolutions.com

Home Modification Solutions, Inc. is a national wide provider of accessibility modifications and specialized home remodeling products. We offer accessibility evaluations, consulting and complete accessibility management. Through our strategically aligned network of product suppliers and licensed construction professionals, we provide accessibility modifications tailored to suite specific needs throughout the United States. All too often, injured individuals return to their homes and face seemingly routine tasks that have become daunting as a result of their injury. Home is no longer the safe haven it once was. These challenges can be addressed, and we can help! Whatever your accessibility challenge, our knowledgeable and professional team will work with you to find the solution that is best for you including installation roll-in and walk-in showers, ceiling lifts and stair lifts, door widening, vehicle modification and much more. Our goal in this process is to promote increased mobility and independence by providing an accessible living environment with a focus on safety and functionality. The mission of Home Modification Solutions is to enrich the life of each customer by providing unique solutions and exceptional service. By fulfilling this mission, Home Modification Solutions will continue its tradition of being an innovative leader in the accessibility industry.

HOMELINK

8384 Adrian Drive, Brooksville, Florida 34613
Contacts: Jackie Dzugen
Phone: (352) 540-9257
Web: www.vgmhomelink.com

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HWA International, Inc.

8363 Wolf Lake Drive #101, Memphis, Tennessee 38133
Contact: Kathy Shanahan
Phone: (901) 388-6120
Web: www.hwainternational.com

HWA International has been providing trust accounting software since 1977. We are an independent, privately held corporation headquartered in Memphis. Our mission is to provide reliable, affordable tools for efficient portfolio management and trust operations with exceptional customer service. Our products provide a full range of processing and reporting solutions for banks, special needs offices, trust companies, family offices, attorneys, CPAs and other financial institutions. Pooled fund accounting is one of our specialties. We can provide an NAV calculator, automated pooled fund distributions tailored to fit your setup, automated fee calculation and processing, an easy export of K-1 information, and more. We are uniquely positioned to customize our systems to help you address the challenges posed by an ever-changing environment. Our team of experienced professionals welcomes the opportunity to work with you in creating a total solution to fit your needs.

InterActive Legal

140 Interlachen Road, Melbourne, Florida 32940
Contact: Steven Palumbo
Phone: 321-252-0100 Fax: 866-249-6649
Web: www.interactivelegal.com

InterActive LegalSuite™ is a collection of legal productivity solutions that will improve your efficiency and profitability. Each product combines powerful drafting software with collaboration tools, continuing education and innovation. Wealth Transfer Planning™, Elder Law & Special Needs Planning™ and Essential Estate Planning™ contain unique strategies developed by renowned estate and elder law planners (including Jonathan G. Blattmachr). Leverage these strategies every day to generate more revenue and improve client satisfaction. Spend more quality time counseling your clients and building your practice and less time drafting. Tap into the intellectual power of leading experts via our interactive on-line forums. Subscribers across the country, including many AmLaw200 firms, recognize InterActive LegalSuite as their key to success. Whether your clients are high-net-worth individuals in need of advanced tax planning or seniors interested in asset protection and Medicaid, elevate your practice to the highest level with InterActive LegalSuite. Connect, Collaborate and Create™.

Krause Financial Services, Inc.

1234 Enterprise Drive, DePere, Wisconsin 54115
Contact: Kendra Bishop
Phone: 866-605-7437 Fax: 866-605-7438
Web: www.medicaidannuity.com

Krause Financial Services is the only attorney-led financial services firm in the nation that specializes in helping families qualify for Medicaid and VA benefits through the use of insurance products. Dale M. Krause, J.D., LL.M., is known for his long-standing personal commitment to elder law attorneys and their clients. He is a national veterans benefits and crisis Medicaid planning advocate, and has earned the distinct reputation of being the "Pioneer of Medicaid Compliant Annuities." Mr. Krause has built a practice that supports elder law attorneys and their clients with insurance products that may reduce or possibly eliminate the monthly costs associated with an assisted living or nursing home stay. At the same time, to keep his VA and Medicaid products relevant to the times, Mr. Krause has established key relationships with marketing executives of major insurance companies to ensure that his insurance products are in compliance with Medicaid and VA requirements. Simply put, Krause Financial Services is the firm that is here to advise elder law attorneys on balanced, flexible solutions to meet their clients' needs.

MEMBERS Trust Company

14025 Riveredge Drive, Suite 280, Tampa, Florida 33637
Contact: Neil Archibald
Phone: 813-631-9191 Fax: 813-631-9898
Web: www.memberstrust.com

Since 1987, MEMBERS Trust Company has provided trust and investment services to credit union members and private clients throughout the United States. Owned and managed by America's credit unions, MEMBERS Trust Company abides by the management philosophy of our owners – to act in the best interest of our clients while fulfilling our fiduciary duty as a trust company. Formed through a cooperative alliance with credit unions across American, MEMBERS Trust Company embodies a new corporate mission for a professional trust and investment company as we operate for the benefit of members and clients, not individual stockholders. These credit unions, with over $80 billion in assets, provide MEMBERS Trust Company with its strategic values and underpin our strength as a national trust and investment firm. As a special purpose federal thrift, MEMBERS Trust Company is supervised by the Office of the Comptroller of the Currency, a federal banking regulator which charters and/or oversees national banks, federal savings banks and trust companies. As you might expect from a trust company owned by credit unions, the staff of MEMBERS Trust Company strives to apply the "Golden Rule" to the people behind each trust. We are committed to understanding the "whole story" and to never losing sight of the fact that someone's loved one is relying on our professional competency and responsibility to care. The question we always ask ourselves is, "How would we want our loved one to be treated by a corporate trustee?" MEMBERS Trust Company's job is more than just managing money. Our team of professional advisors believe that their efforts can and do make a difference in the lives of our clients. Our owners would not tolerate anything less.

MetLife Center for Special Needs Planning

300 Davidson Avenue, Somerset, New Jersey 08873
Contact: Kelly Piacenti
Phone: 877-638-3375 Fax: 908-655-7820
Web: www.metlife.com/specialneeds

The MetLife Center for Special Needs Planning℠ is dedicated to helping families secure lifetime care and quality of life for their dependents with special needs. The Center's mission is to help families plan for the future of their dependents, including preserving government benefits and providing insurance and other financial solutions that can help provide lifetime quality care.

Mobility Support Systems, LLC

8142 Biscayne Court, Saline, Michigan 48176
Contact: Cathy Breneman
Phone: 734-777-0491 Fax: 734-944-2341
Web: www.mobilitysupportsystems.com

Mobility Support Systems, LLC works nationally to provide a unique service to address the specific needs and concerns involved in accessible vehicle disbursements from Special Needs Trust. The MSS® program provides a variety services in addition to vehicle lease options as well as liability protection for the trust, trust beneficiary and trustee. The MSS® All Inclusive Program provides: safety review of appropriate vehicle options, WC-19 wheelchair compliance and wheelchair security restrain system review, 5-year extended warranty, full maintenance program, coordination of the MSS® million dollar liability insurance program, coordination and payment of all license and registration via local Department of Motor Vehicles, 24/7 emergency road-side assistance throughout the United States, liability protection for the Trust, Trust Beneficiary and Trustee. This protection is provided by MSS® holding title to the vehicle with the trust beneficiary and/or appropriate individual and via our unique insurance program. The program also eliminates vehicle disposal issues. In the event the trust beneficiary predeceases we will take the vehicle back with no further obligation by the Trustee of family. We also provide direct vehicle purchase options. All vehicles are personally delivered to the trust beneficiary's home anywhere in the United States (additional fees apply for Alaska and Hawaii).

National Care Advisors, LLC

3982 Powell Road, Suite 231, Powell, Ohio 43065
Contact: Ann Koerner
Phone: 614-309-6673 Fax: 614-538-0197
Web: www.nationalcareadvisors.com

National Care Advisors provides care management and quality of life consulting services to attorneys, trustees and financial managers working with clients that have special needs challenges. Our National services include:

- Third party benefits analysis and advocacy
- Long term quality of life planning and cost projection
- Housing, education, vocational advocacy
- Special needs expenditure planning,
- Service and product vendor selection
- Discount network access for private pay equipment & supplies
- Medicare set aside administration support
- Medical bill review and resolution
- Trust advisor services.

By collaborating with attorneys, financial planners, settlement consultants, corporate trustees and insurance companies, we've made it our core focus to make quality of life not only possible, but sustainable over a lifetime.

Platinum Eldercare

1872 Joe Crosson Drive #104, El Cajon, California 92020
Contact: John Alexander
Phone: 858-792-2897 Fax: 858-792-2899
Web: www.platinumeldercare.com

Let Platinum Eldercare take care of all the work. For the family, Platinum Eldercare provides the best solutions for in-home care by providing services customized to the needs of your loved one. Our time-proven methods stretch your funds extending the time care- giving can be provided in the home. We provide caregivers or hire yours. Our turnover rate is very low and our service most satisfying. You decide what your care budget can handle, and we work inside your budget limits. For the fiduciary, partnering with Platinum Eldercare guarantees you'll have an account "that still has assets left for you to manage" years after our expensive competitors would have burned through the clients funds, eliminating the need for you. Services are designed to help fiduciaries resolve the many issues that arise in providing care giving services for their clients.

Practical Planning System

2995 Main, Suite 1300, Salt Lake City, Utah 84111
Contact: Kim Mayberry
Phone: 877-284-7897 Fax: 866-593-9467
Web: www.practicalplanningsystem.com

The Practical Planning System provides HotDocs® automated will and trust documents, instructional videos, articles, webinars on fundamental and advanced topics, marketing, and practice management.

Regions Bank

100 SE 3rd Avenue, 17th Floor, Fort Lauderdale, Florida 33394
Contact: Diana Batchelor
Phone: 954-675-9245
Web: www.regions.com

If you have a disabled child or family member, meeting that person's needs is a top priority. A "special needs" or "supplemental needs" trust offers the peace of mind you want—and the effective financial solution you need. While you provide physical and emotional support, we will work with you to arrange for any required care; to assist with the coordination of government benefits; and to administer, manage and conserve financial assets. As Trustee, Regions Bank Trust Department complies with local and Federal Regulations to help maintain your loved one's benefits. Fort Lauderdale's locally based Special Needs Trust Group has a combined 60 years of experience. For more information contact one of our Special Needs Trust specialists at 800-833-2938.

Special Needs Alliance

6341 E. Brian Kent, Tucson, Arizona 85710
Contact: Jihane Rohrbacker
Phone: 520-546-1005 or 1-877-572-8472 (toll free)
Fax: 520-546-5119
Web: www.specialneedsalliance.org
Email: info@specialneedsalliance.org

The Special Needs Alliance is a national, not-for-profit organization of attorneys dedicated to the practices of disability and public benefits law.

Stetson University College of Law Office of Career Development

1401 61st Street South, Gulfport, Florida 33707
Contact: Stacy Elizondo
Phone: 727-562-7815 Fax: 727-347-5692
Web: www.law.stetson.edu

Stetson University College of Law, Florida's first law school, has educated lawyers, judges and other professionals for more than a century. Stetson Law offers JD and LLM degrees, top-ranked programs in advocacy and legal writing, four dual-degree programs, and international courses in nine countries. The law school is located in the Gulfport/St. Petersburg area with a satellite campus in downtown Tampa. Stetson University's historic campus, founded in 1883 in DeLand, is home to the College of Arts & Sciences, School of Business Administration and School of Music, and has a satellite center in Celebration offering advanced degrees.

Synergy Settlement Services

4025 Edgewater Drive, Orlando, Florida 32804
Contacts: Christina Sanchez and Jason D. Lazarus
Phone: 877-242-0022 Fax: 877-349-6980
Web: synergysettlements.com

Synergy is the only fully integrated settlement services firm in the United States. Finalizing a settlement has become overly complex, and we can help make things easier for you and your staff. Synergy's comprehensive collection of services allows you to focus on what you do best practice elder law. Our company provides the following services (we can provide all or just one):

- Asset Management Services – Settlement trusts and other settlement planning strategies.
- Lien Resolution – Flat-fee lien resolution services for Medicare, Medicaid, ERISA, Military and Private Healthcare liens.
- MSA/Medicare Secondary Payer Compliance Services–Medicare Set-Aside Allocation/Administration Services.
- Pooled Special Needs Trust Services.
- Structured Settlement/Settlement Services–Complex settlement planning and consulting.

SunTrust Bank

501 E. Las Olas Blvd, 3rd Floor, Ft. Lauderdale, Florida 33301
Contact: Denise A. Lettau
Phone: 954-765-7231 Fax: 954-765-7582
Web: www.suntrust.com

SunTrust's specialized team understands the complex requirements of special needs trusts. Many of our team members are attorneys who have practiced in this area of law, and are well-versed in different types of government benefits. The special needs trust team at SunTrust Bank is solely dedicated to supporting clients with special needs and their families, has the ability to make most discretionary decisions without the need to retain outside counsel, maintains a deep-rooted understanding of the strict technical requirements of maintaining eligibility for government benefits, is acutely aware of disability etiquette which fosters an environment of understanding and comfort, and works directly with individuals with disabilities to the greatest degree possible to help ensure their needs are properly addressed.

Vista Points, Inc.

1550 N. Mt. Juliet Road, Suite 203, Mt. Juliet, Tennessee 37122
Contact: Darlene A. Kemp
Phone: 615-758-4661
Web: www.vistapoints.org

Vista Points, Inc. is dedicated to raising awareness, providing education, and promoting advocacy with regard to Special Needs Trusts. With a properly-designed Special Needs Trust, people living with a disability can have the peace of mind that comes from knowing that assets are safe and their needs are met. The mission of Vista Points, Inc. is to help people living with disabilities, their parents and caregivers, and the professionals who serve and guide them. Vista Points, Inc. is the trustee of the Tennessee Pooled Trust.

Wells Fargo

999 Third Avenue, 40th Floor, Seattle, Washington 98104
Contact: Susan Mesenbrink
Phone: 954-765-3918
Web: www.wellsfargo.com

We recognize that living with a disability can have a profound impact on daily life. Working with a trustee who is experienced and understands these challenges can make all the difference in providing the highest quality of life possible. The Special Needs Trust team has ongoing and extensive experience in working with and addressing the needs of persons living with physical, mental and/or developmental disabilities such as traumatic brain injury, Multiple Sclerosis, Cerebral Palsy, Down Syndrome and Schizophrenia. Wells Fargo Special Needs Trust team has a core knowledge base to address specific client needs. Some of the areas in which we can help our clients are purchasing accessible vehicles, assisting communication devices and technology, education advocacy, speech, occupational, vocational and physical therapies, companion, care giving and respite services, accessible home acquisition, renovation and constructions, case management services, accessible recreational and socialization opportunities, adult family home and other congregate care facilities, non-profit organizations that provide services to those living with a disability and public and private benefits. Our team regularly works with a large number of outside professionals as well as offering the capabilities and resources of Wells Fargo Bank in order to provide a tailored service to meet our clients' needs.

Conference Faculty Chair

Rebecca C. Morgan, Boston Asset Boston Asset Management Chair in Elder Law, Director, Center for Excellence in Elder Law

Pre–Conference Faculty

Linda R. Chamberlain, Attorney at Law, Linda R. Chamberlain, P.A., Clearwater, Florida

Stephen W. Dale, Attorney at Law, The Dale Law Center, Pacheco, California

The Honorable David A. Demers, Sixth Judicial Circuit, St. Petersburg, Florida

Susan Demers, Dean, St. Petersburg College, Clearwater, Florida

Robert B. Fleming, Certified Elder Law Attorney, Fleming & Curti, PLC, Tucson, Arizona

Roberta K. Flowers, Professor of Law, Stetson University College of Law, Gulfport, Florida

Ruthann P. Lacey, Certified Elder Law Attorney, Law Office of Ruthann P. Lacey, P.C., Tucker, Georgia

Janet L. Lowder, Attorney at Law, Hickman & Lowder Co. LPA, Cleveland, Ohio

Wil McCormick, Practice Manager, Law Office of Ruthann P. Lacey, P.C., Tucker, Georgia

Heather Nadler, Certified Elder Law Attorney, Law Office of Ruthann P. Lacey, P.C., Tucker, Georgia

Neal A. Winston, Attorney at Law, Moschella & Winston LLP, Somerville, Massachusetts

Conference Faculty

William J. Browning, Certified Elder Law Attorney, Browning, Meyer & Ball Co., LPA, Worthington, Ohio

James A. Caffry, Attorney at Law, Caffry Law, PLLC, Waterbury, Vermont

Linda R. Chamberlain, Attorney at Law, Linda R. Chamberlain, P.A., Clearwater, Florida

Richard Courtney, Certified Elder Law Attorney, Frascogna Courtney, PLLC, Jackson, Mississippi

Stephen W. Dale, Attorney at Law, The Dale Law Center, Pacheco, California

Lawrence E. Davidow, Certified Elder Law Attorney, Davidow, Davidow, Siegel & Stern, LLP, Islandia, New York

The Honorable David A. Demers, Sixth Judicial Circuit, St. Petersburg, Florida

Susan Demers, Dean, St. Petersburg College, Clearwater, Florida

Heidi J. Flatt, Associate Executive Director for Trust Services, NYSARC Inc., Delmar, New York

Robert B. Fleming, Certified Elder Law Attorney, Fleming & Curti, PLC, Tucson, Arizona

Roberta K. Flowers, Professor of Law, Stetson University College of Law, Gulfport, Florida

Jason A. Frank, Certified Elder Law Attorney, Frank, Frank & Scherr, LLC, Lutherville, Maryland

Bradley J. Frigon, Certified Elder Law Attorney, Law Offices of Bradley J. Frigon, Englewood, Colorado

Laurie Hanson, Attorney at Law, Long Reher & Hanson, P.A., Minneapolis, Minnesota

Mary Alice Jackson, Attorney at Law, Boyer & Jackson, P.A., Sarasota, Florida

Lloyd King, Attorney at Law, Lloyd King Law Firm, PLLC, Raleigh, North Carolina

Ruthann P. Lacey, Certified Elder Law Attorney, Law Office of Ruthann P. Lacey, P.C., Tucker, Georgia

Elena A. Lidrbauch, Attorney at Law, Hickman & Lowder Co., LPA, Cleveland, Ohio

David J. Lillesand, Attorney at Law, Lillesand and Wolasky, P.L., Clearwater, Florida

Janet L. Lowder, Certified Elder Law Attorney, Hickman & Lowder Co., LPA, Cleveland, Ohio

Wil McCormick, Practice Manager, Law Office of Ruthann P. Lacey, P.C., Tucker, Georgia

Susan Mesenbrink, Certified Financial Planner, Wells Fargo, Seattle, Washington

Heather Nadler, Certified Elder Law Attorney, Law Office of Ruthann P. Lacey, P.C., Tucker, Georgia

Craig C. Reaves, Certified Elder Law Attorney, Reaves Law Firm, P.C., Kansas City, Missouri

Vincent J. Russo, Certified Elder Law Attorney, Vincent J. Russo & Associates, P.C., Westbury, New York

G. Mark Shalloway, Certified Elder Law Attorney, Shalloway & Shalloway, P.A., West Palm Beach, Florida

Patricia F. Sitchler, Certified Elder Law Attorney, Schoenbaum, Curphy & Scanlan, P.C., San Antonio, Texas

Eric R. Skidmore, Social Security Administration, Office of Income Security Programs, Office of SSI and Representative Payee Policy, Baltimore, Maryland

Scott C. Suzuki, Attorney at Law, Scott S. Suzuki, Honolulu, Hawaii

Lauchlin Waldoch, Certified Elder Law Attorney, Waldoch & McConnaughhay, P.A., Tallahassee, Florida

Neal A. Winston, Attorney at Law, Moschella & Winston LLP, Somerville, Massachusetts

To view faculty bios, visit www.law.stetson.edu/conferences/snt.

PROGRAM EVALUATION FORM
Pre-Conference: The Elder Law Team
Wednesday, October 19, 2011

A. My purpose in attending was: ❑ CLE Credit ❑ Education in area of practice ❑ Expanded practice to new area
B. Overall, I feel this program was: ❑ At the correct level for me ❑ Too basic ❑ Too advanced
C. Please rate the service you received from the Staff: ❑ Excellent ❑ Good ❑ Fair ❑ Poor
D. Please rate each presenter in the following categories on **scale of 1-5** with 1 being strongly disagree and 5 being strongly agree:

	Presenter	Presentation	Materials	Practical Information	Topic
The Lawyer-Staff Team: What the Lawyers Need the Staff to Know 8:40-9:15 a.m.					
Robert B. Fleming	_____	_____	_____	_____	_____
Roberta K. Flowers	_____	_____	_____	_____	_____
The Judge and the Elder Law Staff 9:15-9:45 a.m.					
Hon. David A. Demers	_____	_____	_____	_____	_____
The Staff Team 9:45-10:35 a.m.					
Dean Susan Demers	_____	_____	_____	_____	_____
Staff Working with Clients (Part 1) Achieving Success: Working with Unstable Families and Difficult Beneficiaries 10:50-11:45 a.m.					
Wil A. McCormick	_____	_____	_____	_____	_____
Ruthann P. Lacey	_____	_____	_____	_____	_____
Staff Working with Clients (Part 2) Care Managers/Case Managers to Clients 11:45 a.m.-12:15 p.m.					
Linda R. Chamberlain	_____	_____	_____	_____	_____
Getting Services for Beneficiaries in Times of Tight Budgets 12:15-12:45 p.m.					
Stephen W. Dale	_____	_____	_____	_____	_____
What Challenges are Facing the Elder Law Team? 12:45-1:15 p.m.					
Roberta K. Flowers	_____	_____	_____	_____	_____

E. What other CLE Topics are of specific interest to you at this time? _____
F. How did you first learn about this program? ❑Email ❑Colleague ❑Another Stetson Prograr ❑Brochure ❑Ad
G. For future green conferences, do you prefer materials on: ❑Flash Drive ❑CD ❑Binder ❑Publish on the Web

TEAR OUT AND RETURN TO REGISTRATION DESK - THANK YOU!

PROGRAM EVALUATION FORM
Pre-Conference: The Basics for Pooled Trust Administrators
Wednesday, October 19, 2011

A. My purpose in attending was: ❑ CLE Credit ❑ Education in area of practice ❑ Expanded practice to new area
B. Overall, I feel this program was: ❑ At the correct level for me ❑ Too basic ❑ Too advanced
C. Please rate the service you received from the Staff: ❑ Excellent ❑ Good ❑ Fair ❑ Poor
D. Please rate each presenter in the following categories on **scale of 1-5** with 1 being strongly disagree and 5 being strongly agree:

	Presenter	Presentation	Materials	Practical Information	Topic
Record Keeping and Accountings for Pooled Trusts 1:40-2:30 p.m.					
Heather Nadler	_____	_____	_____	_____	_____
Pooled Trusts - Conflicts and Potential Conflicts 2:30-3:20 p.m.					
Janet L. Lowder	_____	_____	_____	_____	_____
Elena A. Lidrbauch	_____	_____	_____	_____	_____
Annual Update on SSI and Medicaid Policies 3:40-4:40 p.m.					
Neal A. Winston	_____	_____	_____	_____	_____
Advocacy in This Economy 4:40-5:30 p.m.					
Stephen W. Dale	_____	_____	_____	_____	_____
Heidi J. Flatt	_____	_____	_____	_____	_____

E. What other CLE Topics are of specific interest to you at this time? _____
F. How did you first learn about this program? ❑Email ❑Colleague ❑Another Stetson Program ❑Brochure ❑Ad
G. For future green conferences, do you prefer materials on: ❑Flash Drive ❑CD ❑Binder ❑Publish on the Web

TEAR OUT AND RETURN TO REGISTRATION DESK - THANK YOU!

PROGRAM EVALUATION FORM
The Basics of Special Needs Trusts
Thursday, October 20, 2011

A. My purpose in attending was: ❑ CLE Credit ❑ Education in area of practice ❑ Expanded practice to new area
B. Overall, I feel this program was: ❑ At the correct level for me ❑ Too basic ❑ Too advanced
C. Please rate the service you received from the Staff: ❑ Excellent ❑ Good ❑ Fair ❑ Poor
D. Please rate each presenter in the following categories on **scale of 1-5** with 1 being strongly disagree and 5 being strongly agree:

	Presenter	Presentation	Materials	Practical Information	Topic
History of Special Needs Trusts 8:45-9:35 a.m.					
Craig C. Reaves	_____	_____	_____	_____	_____
The POMS We All Know and Love 9:35-10:25 a.m.					
Robert B. Fleming	_____	_____	_____	_____	_____
What Could Possibly Go Wrong? The Problems and Pitfalls of SNTs 10:50-11:50 a.m.					
Mary Alice Jackson	_____	_____	_____	_____	_____
BREAKOUT SESSIONS 1-1:50 p.m.					
The Most Basic Session of All - Public Benefits and SNTs					
Neal A. Winston	_____	_____	_____	_____	_____
WSNT Talk Radio: Family Conversations					
Richard A. Courtney	_____	_____	_____	_____	_____
James A. Caffry	_____	_____	_____	_____	_____
Words and Music: Implementing the Words of the Trust					
G. Mark Shalloway	_____	_____	_____	_____	_____
Susan Mesenbrink	_____	_____	_____	_____	_____
BREAKOUT SESSIONS 1:55-2:45 p.m.					
Taxation of SNTs - Plain and Simple (maybe some not so plain and simple)					
Bradley J. Frigon	_____	_____	_____	_____	_____
Top 10 Tips for Drafting the Flawless First Party Special Needs Trust					
Laurie Hanson	_____	_____	_____	_____	_____
Administration Ins and Outs, the Dos and Don'ts					
Ruthann P. Lacey	_____	_____	_____	_____	_____
Heather Nadler	_____	_____	_____	_____	_____
BREAKOUT SESSIONS 2:50-3:40 p.m.					
Drafting Redux: Special Needs, Special Words					
Janet L. Lowder	_____	_____	_____	_____	_____
Ethical Issues for Attorneys and Practical Solutions					
Roberta K. Flowers	_____	_____	_____	_____	_____
What You Need to Know About Third-Party SNTs					
Vincent J. Russo	_____	_____	_____	_____	_____

CONTINUED ON BACK PAGE

TEAR OUT AND RETURN TO REGISTRATION DESK - THANK YOU!

PROGRAM EVALUATION FORM, CONTINUED

	Presenter	Presentation	Materials	Practical Information	Topic
Understanding SSA Disability Determinations and Navigating the Application and Appeals Process 4-4:40 p.m.					
Lloyd King	_____	_____	_____	_____	_____
Question and Answer Session 4:40-5 p.m.					
James A. Caffry	_____	_____	_____	_____	_____
Roberta K. Flowers	_____	_____	_____	_____	_____
Laurie Hanson	_____	_____	_____	_____	_____
Mary Alice Jackson	_____	_____	_____	_____	_____
Lloyd King	_____	_____	_____	_____	_____
Ruthann P. Lacey	_____	_____	_____	_____	_____
Janet L. Lowder	_____	_____	_____	_____	_____
Vincent J. Russo	_____	_____	_____	_____	_____
G. Mark Shalloway	_____	_____	_____	_____	_____
Neal A. Winston	_____	_____	_____	_____	_____

E. What other CLE Topics are of specific interest to you at this time? _____

F. How did you first learn about this program? ❑Email ❑Colleague ❑Another Stetson Program ❑Brochure ❑Ad

G. For future green conferences, do you prefer materials on: ❑Flash Drive ❑CD ❑Binder ❑Publish on the Web

TEAR OUT AND RETURN TO REGISTRATION DESK - THANK YOU!

PROGRAM EVALUATION FORM
Special Needs Trusts
Friday, October 21, 2011

A. My purpose in attending was: ❑ CLE Credit ❑ Education in area of practice ❑ Expanded practice to new area
B. Overall, I feel this program was: ❑ At the correct level for me ❑ Too basic ❑ Too advanced
C. Please rate the service you received from the Staff: ❑ Excellent ❑ Good ❑ Fair ❑ Poor
D. Please rate each presenter in the following categories on **scale of 1-5** with 1 being strongly disagree and 5 being strongly agree:

	Presenter	Presentation	Materials	Practical Information	Topic
Update from SSA, by video conference 9-9:50 a.m.					
Eric R. Skidmore	_____	_____	_____	_____	_____
BREAKOUT SESSIONS 10:15-11:05 a.m.					
SNTs and Retirement Benefits					
Laurie Hanson	_____	_____	_____	_____	_____
Trust Protectors: Should You Use Them?					
Craig C. Reaves	_____	_____	_____	_____	_____
The Affordable Care Act: What Attorneys and Trustees Need to Know					
William Browning	_____	_____	_____	_____	_____
Mary Alice Jackson	_____	_____	_____	_____	_____
BREAKOUT SESSIONS 11:10 a.m.-12 p.m.					
Family Catastrophes, Trustees, and Trust Administration					
Patricia F. Sitchler	_____	_____	_____	_____	_____
When the Trustee Hires Others: Thinking About and Drafting Employment Agreements					
Lauchlin Waldoch	_____	_____	_____	_____	_____
SNTs and the Grantor Trust Rules					
Lawrence Eric Davidow	_____	_____	_____	_____	_____
BREAKOUT SESSIONS 1:15-2:05 p.m.					
Minor Beneficiaries, Growing Up and Going to Work: Child Benefits, Aging Out and Working Beneficiaries					
David J. Lillesand	_____	_____	_____	_____	_____
The Changing Law and Regulations: State Statutes and Regional Decisions					
Scott C. Suzuki	_____	_____	_____	_____	_____
Patricia F. Sitchler	_____	_____	_____	_____	_____
Jason A. Frank	_____	_____	_____	_____	_____
The Role of Life Care Plans in SNTs and MSA Calculations					
Janet L. Lowder	_____	_____	_____	_____	_____

TEAR OUT AND RETURN TO REGISTRATION DESK - THANK YOU!

PROGRAM EVALUATION FORM, CONTINUED

	Presenter	Presentation	Materials	Practical Information	Topic
BREAKOUT SESSIONS 2:10-3 p.m.					
Drafting a Medicare Set-Aside Subtrust into the SNT					
Bradley J. Frigon	_____	_____	_____	_____	_____
Using Technology to Enhance Independence, Safety and Quality of Life for Beneficiaries					
G. Mark Shalloway	_____	_____	_____	_____	_____
Splits, SNTs and Public Benefits: An Overview of Special Needs Planning in Family Law					
Scott C. Suzuki	_____	_____	_____	_____	_____
Tips and Trends in the SNT Practice - The 2011 Update 3:30-4:30 p.m.					
Robert B. Fleming	_____	_____	_____	_____	_____

E. What other CLE Topics are of specific interest to you at this time? _____

F. How did you first learn about this program? ❑Email ❑Colleague ❑Another Stetson Program ❑Brochure ❑Ad

G. For future green conferences, do you prefer materials on: ❑Flash Drive ❑CD ❑Binder ❑Publish on the Web

TEAR OUT AND RETURN TO REGISTRATION DESK - THANK YOU!

CONFERENCE DETAILS

Loews Don CeSar Hotel
3400 Gulf Blvd., St. Pete Beach, Florida 33706
Phone (727) 360-1881 Fax (727) 363-5034

Check-in/Check-out: Check-in time is 4 p.m. If you arrive earlier, the hotel will make every effort to check you in, providing there are rooms available. Check-out time is 11 a.m. You must check out prior to leaving for the day's session unless you have made other arrangements.

Spa Oceana: The Loews Don CeSar Hotel Spa Oceana is offering conference attendees a 20% discount off all retail and spa and salon services. Appointments are based on availability, so we highly recommend that you make your reservations in advance. Call today, (727) 363-5029 and mention 'Stetson Group' or dial ext. 2327 from any house phone during the conference. Show your conference name badge at the appointment.

Don CeSar Historical Tour: The Loews Don CeSar Hotel is offering its Historical Tour with Ghost Stories to guests of attendees on Friday, Oct. 21, at 2 p.m. The tour is limited to 20 people. Sign in sheet will be located at the lobby.

Transportation to and from airports: The hotel is located 30 minutes from Tampa International Airport and 25 minutes from St. Petersburg/Clearwater International Airport. If you decide not to rent a car, the cost of a one-way taxi ride from the airport and the hotel averages $65 –$70. Bats Taxi Company is offering a discounted rate to all Special Needs Trusts attendees. You can also reserve transportation by calling Bats Taxi at (727) 367-3702 and use code SNT2011 to receive a discounted rate. This offer is only available for trips from the Tampa International Airport to the hotel and back. Rates are per vehicle, not per person.

Parking: Self parking for attendees staying at the resort is included in your resort fee. Attendees not staying at the resort will receive a parking voucher at the registration desk. Make sure you keep the voucher in a safe place, as we will provide only one voucher per attendee not staying at the resort.

Registration Desk: The registration desk will be open during the following times for sign-in and materials pick up:
Tuesday, Oct. 18
4–9 p.m. *(Buena Vista–Fifth Level)*
Wednesday, Oct. 19
7:30 a.m.–6 p.m. *(Buena Vista–Fifth Level)*
Thursday, Oct. 20
8 a.m.–5 p.m. *(Buena Vista–Fifth Level)*
8–10 a.m. *Satellite Information Desk (Ballroom Arcade–First Level)*
Friday, Oct. 21
7:30 a.m.–5 p.m. *(Buena Vista–Fifth Level)*
7:30–10 a.m. *Satellite Information Desk (Ballroom Arcade–First Level)*

Badges: Please wear your name badge to all sessions. All badges will be at the registration desk when you register.

Materials: Conference materials will be distributed on a flash drive to all attendees, unless you ordered a binder with your registration. Materials will also be available online so you may access them on your laptops or iPads during the conference.

Laptop Users: A section in each room will be reserved for laptop users and will have power sources on a first-come first-served basis. There will also be a "charging station" in the King Charles.

Internet Access: The following rooms at the hotel will have wireless internet access: Grand Ballroom, King Charles, Del Prado, Buena Vista, North Terrace and South Terrace. Please see the registration desk for more information.

CLE Information: To receive CLE credit, it is **mandatory** for each attendee to sign-in at the registration desk each day. If you requested a CLE credit on your registration form, you will receive your CLE packet with your registration packet. A sign-in sheet at the beginning of the conference is required to verify attendance. All certificates of attendance must be signed off by the Director of Conferences and Events before you leave the conference.

Evaluations: We appreciate your feedback! Your evaluation forms are attached to this program. Please keep them with you as you attend each session and fill them out accordingly. At the end of each day, place the completed form in the basket at the registration desk. An overall conference evaluation e-mail will be sent to you shortly after the conference. Your suggestions are used to plan future conferences and much appreciated.

Advisory and Release: Stetson University College of Law reserves the right to use, publish, display, distribute, sell, and/or reproduce in any manner video/recorded voice/photographs, including the right to edit or use a portion of such video/recorded voice/photographs for educational purposes and/or the Stetson University College of Law marketing.

Sponsor and Exhibitor Drawing Card: We have placed cards in your registration packet. Please have 18 or more sponsors and exhibitors stamp your card, then return the stamped card to the registration desk to be entered in a drawing. The winner will be contacted via e-mail after the conference. Drawing prize is one-day free standard registration to 2012 Special Needs Trusts National Conference.

Sponsor and Exhibitor Schedule
King Charles (Fifth Level)
Wednesday, October 19
Continental Breakfast and Exhibits.....8–8:30 a.m.
Break and Exhibits.....10:35–10:50 a.m. and 3:20–3:40 p.m.
Visit Exhibits.....1–1:35 p.m.
Thursday, October 20
Continental Breakfast and Exhibits.....7:30–8:40 a.m.
Break and Exhibits.....10:25–10:50 a.m. and 3:40–4 p.m.
Networking Lunch.....11:50 a.m.–12:55 p.m.
Reception.....5–6:30 p.m.
Friday, October 21
Continental Breakfast and Exhibits.....7:30–8:45 a.m.
Break and Exhibits.....9:50–10:10 a.m. and 3–3:30 p.m.
Networking Lunch.....12–1 p.m.

About Stetson Law: Stetson University College of Law, Florida's first law school, has educated lawyers for more than 110 years. The law school is located in the Gulfport/St. Petersburg area with a satellite campus near downtown Tampa. Stetson University's historic campus, founded in 1883 in DeLand, is home to the College of Arts and Sciences, School of Business Administration and School of Music, and has a satellite center in Celebration offering advanced degrees.

Save the Dates!

Upcoming Center for Excellence in Elder Law Programs

March 3, 2012
Law School for Physicians & Medical School for Lawyers
Tampa Law Center, Tampa, Florida

May 4, 2012
Fundamentals of Special Needs Trust Administration Webinar

October 17–19, 2012
2012 Special Needs Trusts The National Conference

October 17, 2012
Pre-Conference

October 18, 2012
Basics of Special Needs Trusts

October 19, 2012
2012 Special Needs Trusts

Loews Don CeSar Hotel, St. Pete Beach, Florida

STETSON UNIVERSITY

Center for Excellence in Elder Law

ACCESS AND JUSTICE FOR ALL®

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