



Special Needs Trusts X The National Conference

October 16–17, 2008

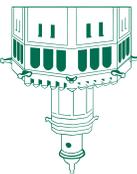
Don CeSar Beach Resort, St. Pete Beach, Florida

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Office of Conferences and Events
1700 North Tampa Street
Tampa, Florida 33602-2653

College of Law

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TUITION: Prices are listed on the registration form. Tuition for each program includes admission to all sessions, program materials on a flash drive, continental breakfasts, refreshment breaks, lunches and Thursday's reception. All attendees are strongly encouraged to bring their laptops to access materials on flash drives. Space is limited, so pre-registration is advised.

TO REGISTER: Online registration is available at www.law.stetson.edu/conferences/SNTX. Complete and return the registration form with payment by mail or fax to (813) 228-0155. Fax and telephone registrations will be taken if accompanied by an authorized credit card number for payment.

CONFERENCE RECEPTION: Conference tuition includes a reception at the Don CeSar Beach Resort at 5 p.m. on Thursday, Oct. 16, 2008.

GUEST MEALS: You may register your guest for the Thursday night reception for additional \$35. For an additional \$100 guests can also purchase a guest meal ticket, which includes refreshment breaks, continental breakfasts and lunches on both days. Please indicate on the registration form and include payment. Guest registrations canceled by Oct. 3, 2008 will be refunded. No refunds can be given after that date.

CANCELLATIONS: Individuals who cancel registration by 5 p.m. on Oct. 3, 2008, will receive a refund less a \$75 cancellation fee. No refunds will be given after that date, but individuals who cancel after Oct. 3, 2008, will have the option of sending a substitute attendee. Telephone cancellations must be confirmed in writing. In the unlikely event that this program is canceled, registration fees will be completely refunded. The sponsors are not responsible for other costs incurred by registrants, including travel and hotel accommodations.

SPECIAL NEEDS: If your attendance requires any aids or services, please notify the Office of Conferences and Events at (813) 228-0226 at least two weeks before the conference.

CONTINUING EDUCATION CREDIT: Application is being made to The Florida Bar for CLE and Elder Law Certification credit for 15 hours. Application is also being made for CPA, CFP, CTFA and Guardianship CE credits. Those who are requesting credit outside of Florida will receive forms to apply for credit in those states. (Please request on registration form.)

ACCOMMODATIONS: The Don CeSar Beach Resort is located on the island of St. Pete Beach on the Gulf of Mexico. The resort features 277 newly renovated guest rooms, a 24-hour fitness center, spa and beach club. The resort is located at 3400 Gulf Boulevard, St. Pete Beach, Florida. A Special Stetson Rate of \$199 single/double is available through Sept. 15, 2008 for a limited number of rooms. Call the hotel directly at (727) 360-1881 or (866) 728-2206 to make your reservation.

WEBCAST: Those who are unable to attend may view the conference via webcast by selecting a webcast option on the registration form. Individuals who register for the webcast by 5 p.m. Oct. 10, 2008 will receive materials on a CD. Individuals who register for webcast will be able to download the materials off the web after Oct. 10, 2008 only. *Please note:* All general sessions and Session 1 will be available for webcast viewing. Session 2 will be available on audio CD for \$35.

"GOING GREEN:" Stetson University College of Law is "going green" for the Special Needs Trusts X conference. To learn more about our *Go Green Initiative*, please visit www.law.stetson.edu/conferences/SNTX.

FACULTY

Professor Rebecca C. Morgan

*Program Chair, Boston Asset Management Faculty Chair in Elder Law
Stetson University College of Law, Gulfport, Florida*

Andrew K. Cuddy
Stephen W. Dale
Richard E. Davis
Kate Dussault
William L. E. Dussault
Robert B. Fleming
Bradley J. Frigon
Leo J. Govoni
Andrew H. Hook
Mary Alice Jackson
Bernard A. Krooks

David J. Lillesand
Janet L. Lowder
Pi-Yi G. Mayo
Vincent J. Russo
Craig C. Reaves
Art R. Rios
Nell Graham Sale
G. Mark Shalloway
Patricia F. Sitchler
Neal A. Winston

To view the speakers' biographies, please visit www.law.stetson.edu/conferences/SNTX.

Program Agenda

The Basics of Special Needs Trusts • October 16, 2008

8:00 - 8:45 a.m.	Registration & Continental Breakfast	1:15 - 2:00 p.m.	Basics of SSI <i>David J. Lillesand</i>
8:45 - 9:00 a.m.	Welcome <i>Professor Rebecca C. Morgan</i>	2:00 - 2:45 p.m.	Special Needs Trusts as an Advocacy Tool Working with Care Managers <i>Stephen W. Dale</i>
9:00 - 10:15 a.m.	Basics of SNTs <i>Bradley J. Frigon</i>	2:45 - 3:00 p.m.	Break
10:15 - 10:30 a.m.	Break	3:00 - 4:00 p.m.	Settlement Issues <i>Pi-Yi G. Mayo & Leo J. Govoni</i>
10:30 - 11:15 a.m.	Spending Issues: Maintain Their Benefits, Spend Their Money, Enrich Their Lives! <i>G. Mark Shalloway</i>	4:00 - 5:00 p.m.	Ten Best Practices for the Beginning Practitioner <i>Mary Alice Jackson</i>
11:15 a.m. - Noon	Taxation of SNTs <i>Bernard A. Krooks</i>	5:00 - 6:00 p.m.	Reception
Noon - 1:15 p.m.	Lunch		

Special Needs Trusts X • October 17, 2008

7:45 - 8:30 a.m.	Registration & Continental Breakfast	1:30 - 2:30 p.m.	Breakout Sessions
8:30 - 8:40 a.m.	Welcome <i>Professor Rebecca C. Morgan</i>	Session I	Immigracion y Fideicomisos: Interpreting the Relationship Between Immigration Law and Trusts <i>Patricia F. Stiehler & Art R. Rios</i>
8:40 - 9:30 a.m.	Case Law Update and New Legislation <i>Robert B. Fleming</i>	Session II	Keeping the Beach Cottage in the Family: Intergenerational Planning Using FLPs and LLCs <i>Andrew H. Hook</i>
9:30 - 9:45 a.m.	Break	2:30 - 2:45 p.m.	Refreshment Break
9:45 - 10:40 a.m.	Breakout Sessions	2:45 - 3:45 p.m.	Breakout Sessions
Session I	Irrevocability is a Relative Term (Especially When a Relative Has a Disability): Modification & Reformation of Irrevocable Trusts <i>Janet L. Lowder</i>	Session I	Elements of a (d)(4)(A) Fee Agreement <i>Mary Alice Jackson</i>
Session II	Your Worst Distribution Nightmare Solved: Accessible Transportation Made Easy <i>Kate Dussault & William L.E. Dussault</i>	Session II	Becoming an Employer? Hiring Help at Home – Taxes and Liabilities <i>Vincent J. Russo</i>
Session III	Special Education: A Growth Practice <i>Andrew K. Cuddy</i>	Session III	SNTastrophe Preparedness: Planning for Disasters <i>G. Mark Shalloway</i>
10:40 - 10:55 a.m.	Refreshment Break	4:00 - 5:00 p.m.	Hot Topics Panel Moderator: <i>Robert B. Fleming</i> <i>David J. Lillesand & Nell Graham Sale</i>
10:55 - 11:55 a.m.	Breakout Sessions	5:00 p.m.	Adjourn
Session I	Divorce American Style, Part Two: Divorce, Child Support and SNTs <i>Neal A. Winston</i>		
Session II	Uniform Trust Code and SNTs: Should it be Feared, Embraced, or Ignored? <i>Richard E. Davis</i>		
Noon - 1:15 p.m.	Lunch		
	Mission Possible: Creating an Independent and Safe Living Environment for Capable Adults with Cognitive and Developmental Disabilities <i>Craig C. Reaves</i>		

For session descriptions, please visit
www.law.stetson.edu/conferences/SNTX.

Special Needs Trusts X ♦ The National Conference

October 16-17, 2008 ♦ Don CeSar Beach Resort

REGISTRATION FORM

(Please submit a separate copy for each registrant from the same institution)

Mr. Ms. Dr. _____ Phone: (____) _____

Title: _____ Fax: (____) _____

Organization/Firm: _____

Address: _____

City: _____ State: _____ Zip: _____

E-mail: _____

In case of an emergency during the conference, please list an emergency name and phone number: _____

Attorneys: CLE Credit? If yes, list state(s): _____ Guardianship Certification Credit?

List other continuing education credits: _____

Org. Membership: _____

Interested in other CLE seminars Stetson University College of Law Alum

First-time attendee - Please enter number of years attended: _____

TUITION

Includes admission to all sessions, conference materials on a flash drive, continental breakfasts, refreshment breaks, lunches and reception.

THE BASICS OF SNT

October 16, 2008

- \$250 Group Discount*
- \$265 Early Registration (by Sept. 18)
- \$275 Standard Registration
- \$260 Webcast viewing
- \$35 Add a binder

SPECIAL NEEDS TRUST X

October 17, 2008

- \$250 Group Discount*
- \$265 Early Registration (by Sept. 18)
- \$275 Standard Registration
- \$260 Webcast viewing
- \$35 Add a binder

TWO SESSION SAVINGS

Attend BOTH and SAVE

- \$445 Group Discount*
- \$475 Early Registration (by Sept. 18)
- \$495 Standard Registration
- \$485 Webcast viewing
- \$70 Add binders for BOTH Sessions

*Group Discount: Combination of three or more registrations from the same firm or non-profit organization, must be mailed together.

- Vegetarian Meal Request (Attendee) Reception, October 16, 2008

GUEST REGISTRATION

- Vegetarian Meal Request (Guest)
- \$100 Guest Meal Ticket (for all continental breakfasts, refreshments breaks and lunches on Oct. 16-17; does not include Thursday reception).
- \$35 Guest Reception Ticket Only (Reception on Oct. 16).

Guest Name: _____

MATERIAL ORDERS ONLY (not attending seminar)

Printed Material Only

- \$150 The Basics of SNT
- \$150 SNT X
- \$225 Both Seminars

Materials on Flash Drive Only

- \$100 Flash Drive (The Basics of SNT)
- \$100 Flash Drive (SNT X)
- \$175 Flash Drives (Both Seminars)

Post-Conference Audio CD Only

- \$225 Audio CD of Basics of SNT
- \$225 Audio CD of SNT X
- \$450 Audio CD of Both Sessions

Includes a flash drive of materials.

TOTAL ENCLOSED: \$ _____

Check (Payable to STETSON UNIVERSITY COLLEGE OF LAW)

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Authorized Signature _____

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