Fundamentals of Special Needs Trusts Administration Webinar

Friday, April 24, 2015 | 1–5 p.m. EDT

STETSON LAW

This webinar will address challenging SNT administrative issues faced by trustees, attorneys, financial planners and money managers involved in special needs trusts administration.

Webinar Schedule of Events (all times listed in Eastern Daylight Time)

1–1:10 p.m.
Welcome and Announcements
Professor Rebecca C. Morgan, Program Chair

1:10–1:50 p.m.
The ABLE Update
Robert B. Fleming, Mary Alice Jackson
Since ABLE was approved late 2014, there has been a lot of discussion about the implementation of the law. This session will provide a brief status on implementation at the federal and state levels.

1:50–2:40 p.m.
Yours, Mine and the SNT's? Parental Duties v. Trust Responsibilities
Stuart D. Zimring
This session will review the requests made by parents of the trustee for distributions, how the trustee determines appropriate expenditures for the SNT, and when the parents should cover the expenditure.

2:40–3:30 p.m.
Things We Used to Do, but Won't Do Again
Mary Alice Jackson
This session will review some of the typical issues in administration, and reasons for handling them differently now.

3:30–4:30 p.m.
Administering SNT When Public Benefits Eligibility is No Longer an Issue
Robert B. Fleming
Sometimes, for various reasons, the beneficiary no longer receives (or needs) public benefits. The trustee is then faced with how to administer a SNT which is no longer needed to "supplement, not supplant" public benefits. This session will cover what a trustee should do in administering a SNT in such circumstance.

4:30–5 p.m.
How Do I Solve This Problem?
Robert B. Fleming, Mary Alice Jackson, Stuart D. Zimring
The day's speakers will problem solve for the audience. Registrants are encouraged to submit questions and problems in advance.

REGISTER NOW | www.law.stetson.edu/conferences/snt-webinar

Registration Form | 2015 Fundamentals of Special Needs Trust Administration Webinar

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CLE Information: Application will be made to The Florida Bar for CLE credits. Although we only apply for CLE credit in the state of Florida, we will provide you with a packet of materials via email if you would like to apply for CLE credit in another state. Stetson University College of Law does not pay the application fee for CLE applications in states other than Florida. For questions, please contact ope@law.stetson.edu or (727) 562-7312.

Cancellation: A full refund will be issued if your cancellation is received on or before March 30, 2015. If you wish to designate a colleague to participate in your place, we will transfer your registration at any point without penalty. A $35 cancellation fee will be retained for cancellations received after March 30, 2015. No refunds will be issued after April 6, 2015. Registrants who cancel after April 6, 2015, will receive a link to the webinar materials via email.

Webinar Registration

❑ $140 Individual registration

❑ $80 CD of materials only*

❑ $140 Audio CD (includes materials on CD)*

*Please include 7% sales tax on all material order sales + $6 shipping charge

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Additional information | www.law.stetson.edu/conferences/snt-webinar