Fundamentals of Special Needs Trusts Administration Webinar

Friday, April 29, 2016 | 1–5 p.m. EDT

STETSON LAW

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

1:10–2:10 p.m.
There's No Place Like Home...An Update On Housing Issues for Beneficiaries with Special Needs
Robert B. Fleming
This session will cover the number of topics regarding housing for beneficiaries, including whether the trust should buy a home for the beneficiary and HUD housing programs available for beneficiaries.

2:10–3:10 p.m.
Surviving the SSA Review Process
René H. Reixach
Notices from Social Security are often cryptic at best, so you will need an appointment of representative form signed by the SSI applicant/ beneficiary for Social Security to talk to you. In this session, we will examine an example of a cryptic notice and a memorandum for an administrative law judge hearing on the issue of paying back to the "State" as opposed to the "states" as well as a recent SSI administrative message concerning court order SNTs that is unfamiliar to some field offices and limits the need to re-evaluate SNTs.

3:10–4:10 p.m.
Having Your Cake and Eating It Too: Protecting the Grantor's Eligibility for Medicaid and SSI Benefits by Funding a Trust for Another Disabled Person
Shirley B. Whitenack
This session will address the federal requirements for making such transfers and the provisions that the trust must contain to protect the public benefits that the grantor and the disabled beneficiary must access.

4:10–4:40 p.m.
The New ABLE POMS
Robert B. Fleming
Various states are enabling legislation to allow ABLE accounts. This session will take a close look at the POMS covering ABLE accounts and make some predictions on the utility of ABLE accounts for SNT beneficiaries.

4:40–5 p.m.
How Do I Solve This Problem?
Robert B. Fleming, Shirley B. Whitenack
The day's speakers will problem solve for the audience. Registrants are encouraged to submit questions and problems in advance.

REGISTER NOW | stetson.edu/law/fundamentalswebinar

Registration Form | 2016 Fundamentals of Special Needs Trust Administration Webinar

Personal Information

Name ______________________________ Phone ______________

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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 April 4, 2016. 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 April 4, 2016. No refunds will be issued after April 11, 2016. Registrants who cancel after April 11, 2016, will receive a link to the webinar materials via email.

Webinar Registration

☐ $140 Individual registration

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Additional information | stetson.edu/law/fundamentalswebinar