2011 Special Needs Trusts ♦ The National Conference
Pre-Conference The Elder Law Team
Wednesday, October 19, 2011

A half-day program for legal assistants, case managers, financial or investment staff, property managers or other office members and the attorneys who work with them.

8:00 a.m. – 8:30 a.m.  Registration

8:30 a.m. - 8:40 a.m. Welcome and Announcements
Rebecca C. Morgan

8:40 a.m. - 9:15 a.m. The Lawyer-Staff Team: What the Lawyers Need the Staff to Know
Robert B. Fleming and Roberta K. Flowers

9:15 a.m. - 9:45 a.m. The Judge and the Elder Law Staff
Honorable David A. Demers

9:45 a.m. - 10:35 a.m. The Staff Team
Dr. Susan Demers

10:35 a.m. – 10:50 a.m. Break and Visit Exhibitors

10:50 a.m. - 11:45 a.m. Staff Working with Clients (Part 1)
Achieving Success: Working with Unstable Families and Difficult Beneficiaries
William A. McCormick and Ruthann P. Lacey

11:45 a.m. – 12:15 p.m. Staff Working with Clients (Part 2)
Care Managers/Case Managers to Clients
Linda R. Chamberlain

12:15 p.m. - 12:45 p.m. Getting Services for Beneficiaries in Times of Tight Budgets
Stephen W. Dale

12:45 p.m. – 1:15 p.m. What Challenges are Facing the Elder Law Team?
Roberta K. Flowers

1:15 p.m. Adjourn
STETSON UNIVERSITY
Center for Excellence in Elder Law
ACCESS AND JUSTICE FOR ALL®

2011 Special Needs Trusts ♦ The National Conference
Pre-Conference The Basics for Pooled Trust Administrators
Wednesday, October 19, 2011

A half-day Program for Pooled Trust Administrators and Attorneys

1:00 p.m. – 1:35 p.m.  Registration

1:35 p.m. - 1:40 p.m.  Welcome and Announcements
  Rebecca C. Morgan

1:40 p.m. - 2:30 p.m.  Record Keeping and Accountings for Pooled Trusts
  Heather Nadler

2:30 p.m. - 3:20 p.m.  Pooled Trusts - Conflicts and Potential Conflicts
  Janet L. Lowder and Elena A Lidrbauch

3:20 p.m. - 3:40 p.m.  Break

3:40 p.m. – 4:40 p.m.  Annual Update on SSI and Medicaid Policies
  Neal A. Winston

4:40 p.m. – 5:30 p.m.  Advocacy in This Economy
  Stephen W. Dale and Heidi J. Flatt

5:30 p.m.  Adjourn
  (Business Meeting to follow)
2011 Special Needs Trusts ♦ The National Conference
The Basics of Special Needs Trusts
Thursday, October 20, 2011

8:00 a.m. – 8:40 a.m. Registration

8:40 a.m. - 8:45 a.m. Welcome and Announcements
Rebecca C. Morgan

8:45 a.m. - 9:35 a.m. History of Special Needs Trusts
Craig C. Reaves

9:35 a.m. - 10:25 a.m. The POMs We All Know and Love
Robert B. Fleming

10:25 a.m. - 10:50 a.m. Break and Visit Exhibitors

10:50 a.m. – 11:50 a.m. What Could Possibly Go Wrong? The Problems and Pitfalls of SNTs
Mary Alice Jackson

11:50 a.m. - 12:55 p.m. Networking Lunch

1:00 p.m. - 1:50 p.m. Breakout Sessions

The Most Basic Session of All – Public Benefits and SNTs
Neal A. Winston

Ethical Issues for Attorneys and Practical Solutions
Roberta K. Flowers

Words and Music – Implementing the Words of the Trust
G. Mark Shalloway and Susan Mesenbrink

1:55 p.m. - 2:45 p.m. Breakout Sessions

Taxation of SNTs- Plain and Simple (and maybe some not so plain and simple)
Bradley J. Frigon
Top Ten Tips for Drafting the Flawless First Party Special Needs Trust
Laurie Hanson

Administration Ins and Outs, the Dos and Don’ts
Ruthann P. Lacey and Heather Nadler

2:50 p.m. - 3:30 p.m. Breakout Sessions

Drafting Redux: Special Needs, Special Words
Janet L. Lowder

WSNT Talk Radio: Family Conversations
Richard A. Courtney and James A. Caffry

What You Need to Know About Third Party SNTs
Vincent J. Russo

3:30 p.m. - 4:00 p.m. Break and visit Exhibitors

4:00 p.m. – 4:40 p.m. Understanding SSA Disability Determinations and Navigating the Application and Appeals Process
Lloyd King

4:40 p.m. – 5:00 p.m. Question and Answer

5:00 p.m. Adjourn and Reception
2011 Special Needs Trusts ♦ The National Conference
Special Needs Trusts
Friday, October 21, 2011

8:00 a.m. – 8:45 a.m.  Registration

8:45 a.m. - 9:00 a.m.  Welcome and Announcements
Rebecca C. Morgan

9:00 a.m. - 9:50 a.m.  Update from SSA
Eric R. Skidmore (by video conference)

9:50 a.m. - 10:10 a.m.  Break and Visit with Exhibitors

10:15 a.m. - 11:05 a.m.  Breakout Sessions

SNTs and Retirement Benefits
Laurie Hanson

Trust Protectors – Should You Use Them?
Craig C. Reaves

The Affordable Care Act and Medicaid
William Browning and Mary Alice Jackson

11:10 a.m. – noon  Breakout Sessions

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

Noon - 1:00 p.m.  Networking Lunch
1:00 p.m. - 1:15 p.m. Visit with Exhibitors

1:15 p.m. - 2:05 p.m. Breakout Sessions

Minor Beneficiaries, Growing Up and Going to Work- Child’s 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 and Jason A. Frank

The Role of Life Care Plans in SNTs and MSA Calculations
Janet L. Lowder

2:10 p.m. - 3:00 p.m. Breakout Sessions

Drafting a Medicare Set Aside Subtrust into a 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

3:00 p.m. - 3:30 p.m. Break and Visit with Exhibitors

3:30 p.m. - 4:30 p.m. Tips and Trends in the SNT Practice – The 2011 Update
Robert B. Fleming

4:30 p.m. Adjourn