Registration includes admission to all registered sessions, downloadable materials, continental breakfasts, refreshment breaks, lunches, and the Thursday reception.

Early Registration • Ends September 18
Pre-Conference Sessions
- Tax Intensive (Ti) $225
- Ti and Basics of SNT $450
- Ti and Special Needs Trusts $450
- Ti and Main Conference $725
- Pooled Trust Intensive (PT) $225
- PT and Basics of SNT $450
- PT and Special Needs Trusts $450
- PT and Main Conference $725

Main Conference
- Basics of SNT $300
- Special Needs Trusts $300
- Main Conference (Basics/SNT) $575

Registration • After September 18
Pre-Conference Sessions
- Tax Intensive (Ti) $265
- Ti and Basics of SNT $500
- Ti and Special Needs Trusts $500
- Ti and Main Conference $800
- Pooled Trust Intensive (PT) $265
- PT and Basics of SNT $500
- PT and Special Needs Trusts $500
- PT and Main Conference $800

Main Conference
- Basics of SNT $350
- Special Needs Trusts $350
- Main Conference (Basics/SNT) $650

Webcast Only
- Basics of SNT $300
- Special Needs Trusts $300
- Main Conference (Basics/SNT) $575

Purchase Additional Materials
Check your preferred option. Prices below.
- Flash Drive* $75
- Binder* $75
- Audio CDs** $75
- Tax Intensive $60
- Pooled Trust Intensive $60
- Basics of SNT $75
- Special Needs Trusts $75
- Main Conference (Basics/SNT) $125
- All four (4) programs $250
* Prices do not include 7% sales tax.
** Prices do not include 7% sales tax plus $9 shipping fee. Audio CDs will ship three weeks post-conference.

Guest Registration
Includes all continental breakfasts, lunches and breaks on chosen day.
- Wednesday, October 14 $100
- Thursday, October 15 $100
- Friday, October 16 $100
- All three (3) days $275

Guest Name for badge (please print)

Dietary Needs
- Attendee Meals
  - Vegetarian
  - Vegan
  - Gluten Free
  - Kosher
- Guest Meals
  - Vegetarian
  - Vegan
  - Gluten Free
  - Kosher

CLE Information
- CLE/State
- CPA
- CTEA
- Florida attorneys will be given Florida Bar Course credit approval. A CLE general information sheet will be given to all out-of-state attorneys and should be submitted by the individual attorney to her/his state.
Pre-Conference: Pooled Trust Intensive • Wednesday, October 14, 2015
1-1:50 p.m.
- “Too Old for a Pooled SNT—Think Again!” Funding Pooled Trust Sub-accounts for Beneficiaries Age 65 and Older, 2015 Update, Megan Brand, Laurie Hanson
- Setting Expectations and Communicating with Special Needs Beneficiaries, Dr. Kathy Piechura-Coure

1:55-2:45 p.m.
- The Power of the Petition: A Trustee’s Role in Protective Proceedings, Megan Brand
- Software Accounting Systems and PSNTs, Barb Helm

3-3:50 p.m.
- The Risks, Decisions and Processes for PSNTs: PSNT Administrators Need to Educate Their Directors, Ron M. Landsman
- Getting Your State Legislators to Listen: Suggestions for the Pooled Trust in Being Heard, John Ariale

Basics of Special Needs Trusts • Thursday, October 15, 2015
1:15-2:15 p.m.
- Veterans Benefits and the Person with Special Needs, Michael P. Allen, Kelly A. Thompson
- Tax Types and Why You Care: The Relationship Between Income Tax, Capital Gain Tax, Gift Tax, and Federal Estate Tax, Nell Graham Sale
- Crowdfunding for Medical Needs and the Special Needs Trust, Mary Alice Jackson

2:30-3:30 p.m.
- Creating the Trust: SSA Requirements to get a Self-Titled Trust Accepted and Funded, and Addressing the Technicalities of Doing It Right in Light of Recent Litigation, Patricia Sitchler
- Differences Matter—First vs. Third-Party SNTs: Structure and Creation, Jane Skelton
- (Re) Introduction to Pooled Trusts, Laurie Hanson

3:30-4:20 p.m.
- Understanding Mandatory and Optional Medicaid Recipients and Services; Relation to Waiver Services, G. Mark Shalloway
- Preparing to Present the SNT to the Court for Approval, Shirley B. Whitenack
- There’s More to Public Benefits than SSI and Medicaid, Janet L. Lowder

Special Needs Trusts National Conference • Friday, October 16, 2015
1-1:55 p.m.
- Challenge for Equity: Divorcing Parents and the Child With Special Needs, Katherine Barr
- Intellectual, Developmental Disabilities, and Dementia, Eileen Poiley
- SSI and SSDI Eligibility for Non-Citizens, Linda Landry

2:05-3 p.m.
- Estate and Long-term Care Planning for Adults Living with Disabilities, Laurie Hanson
- For Better or for Worse, In Sickness and in Health—Divorce and the Spouse With Special Needs, Stuart D. Zimring
- How to Lay the Groundwork: Appeal to a State Court the Specific Issue of Funding a (d)(4)(C) Pooled Trust Account by Someone Over 64, Ron M. Landsman

3:15-4:05 p.m.
- Work and Beneficiaries: What are the SSI and SSDI Work Incentives?, Linda Landry
- Marketing Your Special Needs Planning Skills to Others; Expanding Your Practice Focus, Shirley B. Whitenack
- Getting Properly and Legally Paid When Establishing or Defending a Special Needs Trust That Affects SSI Disability Benefits, David J. Lillesand