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.

8:30 a.m.  Registration  Buena Vista
8:30 a.m.  Breakfast and Visit Sponsors and Exhibitors  King Charles
8:30-8:40 a.m.  Welcome and Announcements  South Terrace
  Rebecca C. Morgan
8:40-9:15 a.m.  The Lawyer-Staff Team: What the Lawyers Need the Staff to Know  South Terrace
  The presenters in this session will cover the issues that the staff need to know-from the lawyer’s perspective, including office goals and operations, ethical issues the attorney faces when supervising staff, and common ethical mistakes staff may make in going about their jobs.
  Robert B. Fleming and Roberta K. Flowers
9:15-9:45 a.m.  The Judge and the Elder Law Staff  South Terrace
  Judge Demers will discuss the line between attorneys and staff when interacting with the courts, and how staff can cross that line without recognizing it.
  Honorable David A. Demers
9:45-10:35 a.m.  The Staff Team  South Terrace
  For an office to function effectively, the staff must function as a team. Dr. Demers will cover interpersonal relationships and office dynamics and offer tips on enhancing teamwork and meshing personalities.
  Dr. Susan Demers
10:35-10:50 a.m.  Break and Visit Sponsors and Exhibitors
10:50 -11:45 a.m.  Staff Working with Clients (Part 1)  South Terrace
Achieving Success: Working with Unstable Families and Difficult Beneficiaries
The focus of this session is the legal team working through circumstances dealing with unstable families and difficult beneficiaries - whether dysfunctional, struggling together to cope or in the process of breaking apart — we look at situations regarding newly injured beneficiaries, “seasoned” beneficiaries and beneficiaries at the end of their lives.
Wil A. McCormick and Ruthann P. Lacey

11:45 a.m.-12:15 p.m.  Staff Working with Clients (Part 2)  South Terrace
Care Managers/Case Managers to Clients
This session will explore the use of professional geriatric care managers and case managers as part of the team and how the care/case managers can work with clients in an effective and successful way.
Linda R. Chamberlain

12:15-12:45 p.m.  Getting Services for Beneficiaries in Times of Tight Budgets  South Terrace
This session will offer suggestions and examples on how trustees can access programs and find services for their beneficiaries in light of budget cuts and program cuts. Some of the lesser known programs and privately funded programs will be reviewed in this session.
Stephen W. Dale

12:45-1:15 p.m.  What Challenges are Facing the Elder Law Team?  South Terrace
The audience members will divide into small groups based on their job descriptions to discuss the challenges they face and share tips to improve the working relationship between the members of the elder law team.
Roberta K. Flowers

1:15 p.m.  Adjourn