Fundamentals of Special Needs Trusts Administration Webinar

Friday, May 5, 2017 | 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:p.m.
Becoming a SNT Administrator
Travis D. Finchum
Serving as a SNT administrator is a lot like juggling while writing a scholarly paper. You must be knowledgeable about the law, regulations and policies, while managing staff and helping often-difficult beneficiaries. This session will cover what it takes to be an effective SNT administrator by someone who has been doing it successfully for many years.

2–3 p.m.
A Primer On Tax When Making Distributions
Michael Cahill
This session will consider the tax implications for a grantor trust, disbursements that count for income tax purposes, income tax reporting and its' impact on Medicaid eligibility, tax implications when trust pays beneficiary medical expenses, and other topics that trustees must consider.

3–3:50 p.m.
Changes in Laws and SSA Regulations (You Know —the POMS) and How Those Impact the Administration of Your SNT
Mary Alice Jackson
Keeping up with all the changes in the law, regulations, and POMS isn't easy, but we are making it easy just for you! During this session, Mary Alice Jackson will discuss changes in law, regulations and public policy, and how the changes might affect the administration of Special Needs Trusts.

3:50–4:40 p.m.
SNT Administrators: More Choices Than You Think
Robert B. Fleming
SNT administrators do more than just administer a SNT. This session will look at the various services and products available, including ABLE accounts, 1st party SNTs, PSNTs, and debit cards when administering the funds of a beneficiary with special needs.

4:40–5 p.m.
Question and Answer Panel
Michael Cahill, Travis D. Fichum, Robert B. Fleming and Mary Alice Jackson
The webinar speakers will problem solve for the audience. Registrants may (and are encouraged to) submit their questions and problems in advance.

REGISTER NOW | stetson.edu/law/fundamentalswebinar

Registration Form | 2017 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 Policy: There are no refunds. If you are unable to attend the live webinar, the video presentation will available to you until Thursday, May 11. You may designate a colleague to participate in your place by emailing ope@law.stetson.edu.

Webinar Registration (includes materials)	❑ $150 Individual registration
Audio Download (includes materials)	❑ $150 (Download will be made available 3-6 weeks post-webinar)
Video Download (includes materials)	❑ $150 (Download will be made available 3-6 weeks post-webinar)
Audio CDs (including materials)	❑ $190 (Audio CDs will be mailed 3-6 weeks post-webinar)

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Additional information | stetson.edu/law/fundamentalswebinar