

**2016 National Conference on Special Needs Trusts and Special Needs Planning • Oct. 19–21, 2016  
In-Person or Webcast Attendee Order Form Only • Register Online at [stetson.edu/snt](http://stetson.edu/snt)**

*Not able to attend? Visit [stetson.edu/snt](http://stetson.edu/snt) for non-attendee materials order form*

**A separate form must be received from each registrant from the same organization or firm.**

Mr. Ms. Dr. \_\_\_\_\_ First name (for badge) \_\_\_\_\_

Title \_\_\_\_\_ Phone (\_\_\_\_) \_\_\_\_\_

Organization/Firm \_\_\_\_\_ Mobile (\_\_\_\_) \_\_\_\_\_

Please list your mobile phone number in case we need to reach you during the conference.

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email \_\_\_\_\_  Stetson Law Alumni

In case of an emergency during the conference, please list an emergency name and phone number:

Contact Name \_\_\_\_\_ Contact Phone \_\_\_\_\_

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

**Early Registration • Ends September 23**

Pre-Conference Sessions (Oct. 19)

- Tax Intensive (TI) . . . . . \$250
- TI and National Conference . . . . . \$750

- Pooled Trusts Intensive (PT) . . . . . \$250
- PT and National Conference . . . . . \$750

National Conference (Oct. 20-21)

- Conference Only . . . . . \$595

**Registration • After September 23**

Pre-Conference Sessions (Oct. 19)

- Tax Intensive (TI) . . . . . \$275
- TI and National Conference . . . . . \$850

- Pooled Trusts Intensive (PT) . . . . . \$275
- PT and National Conference . . . . . \$850

National Conference (Oct. 20–21)

- Conference Only . . . . . \$675

**Webcast Only (Oct. 20–21)**

- National Conference . . . . . \$600

**Attendee Dietary Needs**

- Vegetarian  Vegan
- Gluten Free  Kosher

**CLE Information\***

- CLE/State \_\_\_\_\_

*\*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 his/her state.*

**Purchase Additional Materials**

Check your preferred option. Prices below.

- Flash Drive  Binder
- Tax Intensive . . . . . \$75
- Pooled Trusts Intensive . . . . . \$75
- National Conference . . . . . \$125
- All three (3) programs . . . . . \$250

Prices do not include 7% sales tax. Materials will be received at conference. Webcaster materials will be mailed 3-6 weeks post-conference.

**Audio Download**

- Tax Intensive . . . . . \$75
- Pooled Trusts Intensive . . . . . \$75
- National Conference . . . . . \$125
- All three (3) programs . . . . . \$225

Download will be available 3-6 weeks post-conference.

**Audio CDs**

- Tax Intensive . . . . . \$100
- Pooled Trusts Intensive . . . . . \$100
- National Conference . . . . . \$150
- All three (3) programs . . . . . \$300

Prices do not include 7% sales tax and \$9 shipping fee. Audio CD will be mailed 3-6 weeks post-conference.

**Guest Refreshment Registration**

Includes all continental breakfasts, lunches and breaks on chosen day. Does not include educational sessions.

- Wednesday, October 19 . . . . . \$100
- Thursday, October 20 . . . . . \$100
- Friday, October 21 . . . . . \$100
- All three (3) days . . . . . \$275

**Guest Dietary Needs**

- Vegetarian  Vegan
- Gluten Free  Kosher

Guest Name for badge (*please print*)

**Total Registration**

Conference \_\_\_\_\_

Guest Ticket(s) \_\_\_\_\_

**Conference/Guest Total** \_\_\_\_\_

Additional Materials Total \_\_\_\_\_

Additional Materials Tax (7%) \_\_\_\_\_

Shipping Fee (Audio CDs) \$9 \_\_\_\_\_

Webcaster Shipping Fee (FD) \$4 \_\_\_\_\_

Webcaster Shipping Fee (Binder) \$9 \_\_\_\_\_

**Additional Materials Total** \_\_\_\_\_

**Total Enclosed** \_\_\_\_\_

**Payment Information**

- Check (payable to Stetson Law)
- VISA  MC  AMEX

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**Mail, Fax, or Email Completed Registration Form(s) and Payment to:**

Stetson University College of Law  
Office of Professional Education  
1401 61st Street South  
Gulfport, Florida 33707

Phone: 727-562-7312

Fax: 727-345-1838

Email: [ope@law.stetson.edu](mailto:ope@law.stetson.edu)

**Cancellation, postponement and substitution policy available online at [stetson.edu/snt](http://stetson.edu/snt).**

Name \_\_\_\_\_ Email \_\_\_\_\_

Indicate the breakout sessions you plan to attend (non-binding). Webcast registrants DO NOT need to complete this section.

Session Level Key: (A) Administrative Level (AV) Advanced Level (B) Basic Level

### Pre-Conference: Tax Intensive • Wednesday, October 19, 2016

#### 3:30–4:15 p.m.

- Third Party SNT as a Tax Planning Device, *Nell Graham Sale*
- 529 Plans and ABLE Accounts, *Richard Gershon*
- Powers of Appointment to Get a Stepped Up Basis, *Dennis M. Sandoval*

#### 4:15–5 p.m.

- No Really, Does My Trust Need an EIN?, *Robert B. Fleming*
- The SNT as an Employer: Tax Issues, *Bradley J. Frigon*
- To Create or Not Create a Grantor Trust...That is the Question, *Dennis M. Sandoval*

### Pre-Conference: Pooled Trusts Intensive • Wednesday, October 19, 2016

#### 12:30–1:30 p.m.

- Leadership Topics: Managing People and Structuring Your Trust Personnel: What Works Well, *Heidi J. Flatt*
- Fiduciary Concerns Associated with Purchase and Modification of Homes for Special Needs Beneficiaries, *Tara Anne Pleat*

#### 1:40–2:40 p.m.

- Special Needs Trust Administrative Practices, *Bill Frazier*
- Managing Beneficiary Expectations: Beneficiary Needs vs. Fiduciary Duties, Trustee Best Practices and Compliance Oversight, *Peter J. Wall*

#### 3–4 p.m.

- Non-Monetary Incentives for Non-Profit Employees, *Jacqueline Gayle-Kelly*
- Marketing the SNT/PSNT with the ABLE Act, *Stephen W. Dale*

#### 4:10–5:30 p.m.

- Risk Management, *Gentry Barnett Byrnes, Paula Salinas*
- What Pooled SNT Administrators Need to Know About VA Benefits, *Dean Michael P. Allen*

### National Conference • Thursday, October 20, 2016

#### 1:15–2:05 p.m.

- The Most Basic of SNT Presentation (B), *Jane E. Skelton*
- Common Problems and Practical Solutions in Special Needs Trusts Administration (A), *Tara Anne Pleat*
- What Next? After Signing the SNT for Young Adult on SSI, What Benefits Might the Beneficiary Receive That May Impact Trusts Administration (AV), *Blaine P. Brockman*

#### 2:15– 3:05 p.m.

- Public Benefits Basics (B), *H. Amos Goodall Jr.*
- Discretionary Distribution Scenarios: Prioritizing the Beneficiary Amid a Family Environment of Entitlement (A), *Elizabeth N. Rollings*
- Trusts in Minor Chords: Using Lesser Known Trusts in Perfect Harmony in Your Practice (AV), *Bryn A. Poland*

#### 3:15– 4:05 p.m.

- Drafting Basics of SNTs (B), *Patty F. Sitchler*
- Defusing Dangerous Situations When Working With Beneficiaries with Mental Health Problems (A), *Robert Pierce*
- Medicare Set Asides in Special Needs Planning (AV), *Susan K. Tomita*

#### 4:15– 5:05 p.m.

- Bet You Didn't Know This About SSA (B), *Ben Belton*
- Trustees Being Proactive About Distributions (A), *Judge Kristin Booth Glen*
- Where the Rubber Meets the Road: Engaging Your Local Public Housing Authority (AV), *Blaine P. Brockman, Dennis S. Guest*

### National Conference, Day 2 • Friday, October 21, 2016

#### 1:15–2:05 p.m.

- Think Before You Spend, So You Don't Get Sued (A), *Harrison Bergman, Ann Koerner*
- The ABLE Update and How to Use ABLE in Special Needs Planning (AV), *John Ariale*
- Reverse Mortgages—Ins, Outs, Good, Bad and Then Some (B), *Mark D. Bauer*

#### 2:15–3:05 p.m.

- Grantor Trust Rules (B), *Robert B. Fleming*
- Crowdfunding in 2016 (AV), *Mary Alice Jackson*
- What Trustees Need to Know About Supported Decision-Making (A), *Judge Kristin Booth Glen*

#### 3:15–4:05 p.m.

- Practice Basics for Attorneys New to Special Needs Planning: Client Concerns, Client Interactions and Marketing the Practice (B), *Barbara S. Hughes*
- The Spiritual Art of Being a Special Needs Counselor (AV), *Evan J. Krame*
- The DeCambre Decision and Your Local Housing Authority (A), *Ron M. Landsman*