

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 (_____) _____

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

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
- Conference breakfasts, breaks and lunches
- Thursday evening reception

Programs

October 16 | SSA Mechanics Boot Camp, Veterans Benefits Intensive, Tax Intensive, Pooled Trusts Intensive

October 17-18 | National Conference

Early Registration • Ends September 20

- SSA Mechanics Boot Camp \$175
- SSA & National Conference \$775
- Veterans Benefits Intensive (VBI) . . \$175
- VBI & National Conference \$775
- Tax Intensive (TI) \$300
- TI & National Conference \$800
- Pooled Trusts Intensive (PTI) \$300
- PTI & National Conference \$800
- National Conference Only \$675

Registration • After September 20

- SSA Mechanics Boot Camp \$175
- SSA & National Conference \$850
- Veterans Benefits Intensive (VBI) . . \$175
- VBI & National Conference \$850
- Tax Intensive (TI) \$335
- TI & National Conference \$925
- Pooled Trusts Intensive (PTI) \$335
- PTI & National Conference \$925
- National Conference Only \$725

Webcast Only

- National Conference (Oct. 17-18) \$625

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. Visit stetson.edu/snt for VA Accreditation information.*

Purchase Additional Materials

Check your preferred option. Prices below.

- Flash Drive Binder
- SSA Mechanics Boot Camp . . . \$80.25
- Tax Intensive \$107
- Pooled Trusts Intensive \$107
- National Conference \$160.50
- Tax Intensive/Pooled Trusts Intensive National Conference \$294.25

Prices include 7% sales tax. Materials will be received at conference. Webcaster materials will be mailed 3-6 weeks post-conference.

Audio Download

- SSA Mechanics Boot Camp . . . \$75
- Veterans Benefits Intensive . . . \$175
- Tax Intensive \$100
- Pooled Trusts Intensive \$100
- Tax Intensive/Pooled Trusts Intensive/National Conference . . . \$300
- National Conference \$200

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

Bringing A Guest? Guest Meal Fee(s)

Includes all conference breakfasts, breaks and lunches on chosen day.

Does not include educational sessions.

- Wednesday, October 16 \$100
- Thursday, October 17 \$100
- Friday, October 18 \$100
- All three (3) days \$275

Guest Dietary Needs

- Vegetarian Vegan
- Gluten Free Kosher

Guest Name for badge (please print)

Total Registration

Conference _____

Guest Meal Fee(s) _____

Conference/Guest Total _____

Additional Materials Total _____

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
- Card Number _____

Exp. Date _____

Cardholder name (printed)

Cardholder Signature _____

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: 727-562-7393

Fax: 727-562-7673

Email: ope@law.stetson.edu

Cancellation, postponement and substitution policy available online at stetson.edu/snt.

Name _____ Email _____

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

Tax Intensive | Wednesday, October 16, 2019

12:50-1:40 p.m. | Breakout Session 1

- That UPIA Topic
- 2019 Tax Basis Planning

1:45-2:35 p.m. | Breakout Session 2

- The IRS and Audits of Estate & Gift Tax Returns
- Tax Return Position Ethics or Retaining Your Right To Practice

3:00-3:50 p.m. | Breakout Session 3

- Transferring Trust from One State to Another and Changing Situs of Trust for Tax Purposes; State Income Tax Treatment of Trusts
- Taxation of Investment Income including Capital Gains and Qualified Dividends

Pooled Trusts Intensive | Wednesday, October 16, 2019

1:15-2:05 p.m. | Breakout Session 1

- Investments-Who is the Investor and Who has Responsibility?
- How to Communicate with Nonverbal Beneficiaries - From Low Tech to High Tech
- Death, Grief, and Beyond: A Multitude of Issues to Consider when Beneficiaries Die

2:05-2:55 p.m. | Breakout Session 2

- Evaluating Applicants to the Pooled Trust. Are There Times to Turn Down an Enrollment?
- Emerging Issues in PSNT Administration
- Structured Settlements-A Valuable Tool for Settlement Planning

3:15-4:05 p.m. | Breakout Session 3

- Mental Disorders, Mental Capacity, and Warning Signs Impacting Gun Ownership for Special Needs Populations/Clients
- Beneficiary Portals
- Legal and Practical Issues in using Caregivers-Contracts, Quality Control, Selection, etc.

4:05-4:55 p.m. | Breakout Session 4

- Sexual Health and Safety of Persons with Disabilities
- The Nuance of Distributions When the Beneficiary is a Minor
- Public Benefits Jeopardy

National Conference on Special Needs Planning and Special Needs Trusts | Thursday, October 17 Breakouts

12:45-1:35 p.m. | Breakout Session 1

- A Guided Magical Mystery Tour of the POMS
- Best Practices on Liability Medicare Set-Asides... Proactive or Reactive
- Health Care Programs & Benefits for Beneficiaries

1:35-2:25 p.m. | Breakout Session 2

- Paying Caregivers and Employees from a Trust: 10 Easy Ways to Get Sued
- Orbiting Between Plenary Guardianship and Supported Decision-Making
- SNT Attorney & Litigators: How to Manage these Relationships and Approach Marketing to and Educating PI Attorneys

2:45-3:35 p.m. | Breakout Session 3

- Communication in the Digital Age
- Malpractice and Breach of Fiduciary Duty: What Can Go Wrong?
- My First Decanting: How I Learned to Let the Wine and the Trust Breathe

3:40-4:30 p.m. | Breakout Session 4

- All About ABLE
- Deescalating Danger: Communicating with Individuals with Mental Illness in an Emotional State
- The Very Basic Basics of Public Benefits

National Conference on Special Needs Planning and Special Needs Trusts | Friday, October 18 Breakouts

12:45-1:35 p.m. | Breakout Session 1

- What is the Effect of Work on SSI and SSDI Recipient Eligibility?
- 3rd Party SNT FAQs from Attendees
- Reasonable Compensation

1:35-2:25 p.m. | Breakout Session 2

- Dotting the I's and Crossing the T's
- Trustee School! How to Train Family Member Trustees
- Marketing your SNT Practice

3:00-3:50 p.m. | Breakout Session 3

- When are Non-citizens Eligible for SSI?
- Unique Challenges Faced by Trust Officers/Corporate Fiduciaries
- The Very Fundamental Fundamentals of SNTs