STETSON UNIVERSITY

Center for Excellence in Elder Law

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2011 Special Needs Trusts The National Conference
Pre-Conference: The Basics for Pooled Trust Administrators
Wednesday, October 19, 2011

A Half-Day Program for Pooled Trust Administrators and Attorneys

1-1:35 p.m.	**Registration**	**Buena Vista**
1-1:35 p.m.	**Visit Sponsors and Exhibitors**	**King Charles**
1:35-1:40 p.m.	**Welcome and Announcements** *Rebecca C. Morgan*	**South Terrace**
1:40-2:30 p.m.	**Record Keeping and Accountings for Pooled Trusts** *This session will look at the laws and regulations on accountings and record keeping for pooled trusts, including those reports for beneficiaries, trustees, guardians, agencies and courts.* *Heather Nadler*	**South Terrace**
2:30-3:20 p.m.	**Pooled Trusts-Conflicts and Potential Conflicts** *A pooled trust must be cognizant of actual and potential conflicts, whether with board members or fee issues, and must develop policies to avoid conflicts and deal with those that occur. The presenters will also cover drafting and implementing grievance policies for beneficiaries to use.* *Janet L. Lowder and Elena A Lidrbauch*	**South Terrace**
3:20-3:40 p.m.	**Break and Visit Sponsors and Exhibitors**	**King Charles**
3:40-4:40 p.m.	**Annual Update on SSI and Medicaid Policies** *The SSA has an explicit (but complicated) set of rules and rulings about the relationship of SSI to d4C pooled trusts. Centers for Medicare & Medicaid Services (CMS) is less clear about its position on certain pooled trust policies, and often state Medicaid agencies make their own policy. This session discusses the definite (and not so definite) issues and changes that have come up over the past year for pooled trusts for the two programs on the national and regional levels.* *Neal A. Winston*	**South Terrace**
4:40-5:30 p.m.	**Advocacy in This Economy** *This session will offer suggestions and examples on how trustees can advocate for their beneficiaries in light of budget cuts, elimination of programs and services, and longer and longer waiting lists.* *Stephen W. Dale and Heidi J. Flatt*	**South Terrace**