

STETSON UNIVERSITY

Center for Excellence in Elder Law

ACCESS AND JUSTICE FOR ALL[®]

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.

8-8:30 a.m.	Registration	Buena Vista
8-8:30 a.m.	Breakfast and Visit Sponsors and Exhibitors	King Charles
8:30-8:40 a.m.	Welcome and Announcements <i>Rebecca C. Morgan</i>	South Terrace
8:40-9:15 a.m.	The Lawyer-Staff Team: What the Lawyers Need the Staff to Know <i>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.</i> <i>Robert B. Fleming and Roberta K. Flowers</i>	South Terrace
9:15-9:45 a.m.	The Judge and the Elder Law Staff <i>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.</i> <i>Honorable David A. Demers</i>	South Terrace
9:45-10:35 a.m.	The Staff Team <i>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.</i> <i>Dr. Susan Demers</i>	South Terrace
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** **South Terrace**
of Tight Budgets
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** **South Terrace**
Law Team?
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**