Boston Asset Management

Chair in Elder Law

Stetson University College of Law

1401 61st Street South

Gulfport, Florida 33707

(727) 562-7872

morgan@law.stetson.edu

***EDUCATION***

J.D. Stetson University College of Law, 1980

B.S. Business Administration, Central Missouri State University, 1975

***ACADEMIC POSITIONS***

2019-2024 Director, M.J. Health Care Compliance

2007-2023 Boston Asset Management Chair in Elder Law

2019-2020 Interim Director, Center for Excellence in Elder Law; Interim Director, LL.M. in Elder Law; Interim Director, M.J. in Aging

2014-2018 Co-Director, Center for Excellence in Elder Law

2007-2015 Director, LL.M. in Elder Law

1995-2014 Director, Center for Excellence in Elder Law

1992-95 Associate Dean, Academic Affairs

1991 Professor of Law, Stetson University College of Law

1990 Granted Tenure, Stetson University College of Law

1989-92 Assistant Dean, Student Services and Placement

1988-91 Associate Professor, Stetson University College of Law

1985-87 Visiting Assistant Professor, Stetson University College of Law

***TEACHING RESPONSIBILITIES***

J.D. courses:

Elder Law Seminar, Introduction to Law & Aging, Trusts & Estates

***ADMINISTRATIVE RESPONSIBILITIES***

Director, M.J. Health Care Compliance

2019-2020 Interim Director, Center for Excellence in Elder Law; Interim Director, LL.M. in Elder Law; Interim Director, M.J. in Aging; Director, M.J. Health Care Compliance.

***OTHER LEGAL EMPLOYMENT***

1989 University of South Florida: Adjunct Professor, taught course on guardianship during the spring semester.

1981-85 Gulfcoast Legal Services Senior Advocacy Unit: Staff Attorney 1981-83; Project Director for Senior Citizens Outreach Project for Pinellas & Manatee Counties (three offices) 1983-85.

***PUBLICATIONS***

***Books***

Tax, Estate & Financial Planning For The Elderly (co-author of semi-annually updated loose-leaf) (Matthew Bender)

Tax, Estate & Financial Planning For the Elderly Forms Book (co-author of semi-annually updated loose-leaf) (Matthew Bender)

Planning for the Elderly In Florida (co-author of annually updated loose-leaf) (LexisNexis).

Fundamentals of Special Needs Trusts (co-author of annually updated loose-leaf) (LexisNexis)

Ethics in an Elder Law Practice (co-author) (ABA)

Planning for Disability (co-author) (BNA)

Elder Law in Context (co-author) (Aspen)

Bankruptcy in Context (co-author) (Aspen)

Mastering Interviewing and Counseling (co-author) (Carolina Academic Press)

Third Party and Special Needs Trusts (ABA)

***Book Chapters***

*Elder Law for Rural Elders; chapter for Rural Aging (a compendium on elder rights in Maine)(Fall 2020).*

*Special Needs Trusts in the United States: Planning for the Needs of People with Disabilities, Regardless of Age*,in *Las Nuevas Herramientas de Protección Juridico-Privada de Las Personas Dependientes: Un estudio* (2015) (chapter within a book).

*An Essay on Reform: Guardianship in the United States* (2015) (in Festschrift in Honor of Dr. Mokoto Arai)*.*

*Comparative Ethics in Incapacity and Guardianship Matters* (chapter author) (editor, A. Kimberly Dayton).

*Future of Elder Law & Conclusion* (Chapter 10) Theories on Law & Ageing (chapter author) (Springer Publications) (2008).

*Health Decisions and Directives About the End of Life*, (Chapter 19) (co-author) Handbook of Gerontology: Evidence-Based Approaches to Theory, Practice & Policy (Wiley 2007).

*Health Care Decision-Making, Chapter 33,* Advising the Elderly Client, Mezzullo & Woolpert (Updated Chapter) (1995 Clark, Boardman, Callaghan Publishers).

*Children and Families Creation and Conflict*, 1B Current Perspectives in Psychological, Legal and Ethical Issues (chapter author) (1991 Jessica Kingsley Publishers).

*Life Planning in Florida* (co-author) (1988 D & S Publications).

***LAW REVIEW ARTICLES PUBLISHED***

*Failing Aging: Congress, the Social Contract, and “Saving” Social Security and Medicare* (forthcoming 2025)

*Empowering the Wicked: How Some Agents Use a Power of Attorney to Commit the Crime of Financial Exploitation* (co-author) 30 Ill. Elder L.J. 1 (2022).

*Maximizing Autonomy & Ensuring Accountability—Rights-Based Post-Appointment Issues in the “New Normal”* (co-author) 72 Syracuse L. Rev. 41 (2022).

*Financial Exploitation by Agents under Powers of Attorney: It Is a Crime! Criminal Justice Magazine* (co-author)(ABA Winter 2020).

*A View from the Bridge: A Brief Look at the Progression of Cases of Elder Financial Exploitation Prosecutions,* 25 Ill. Elder Law Journal 271 (2017-2018)(co-author)

*Family Matters*, Journal of American Academy of Matrimonial Lawyers (2016)

*An Essay on Reform: Guardianship in the United States,* published in *Festschrift* in honor of Dr. Mokoto Arai (September 2015) (co-author).

*What the Future of Aging Means to All of Us: An Era of Possibilities,* 48

Indiana Law Review 125 (2014).

*Standards for Financial Decision-Making: Legal, Ethical, and Practical Issues*, 3 Utah L. Rev. 1275 (2012) (co-authored with Robert B. Fleming).

*Introduction: Teaching Elder Law*, 40 Stetson Law Review 1 (Fall 2010).

*The Elderly in Bankruptcy and Health Reform,* 18 Georgetown J. on Poverty Law & Policy 1 (Fall 2010).

*The Future of Elder Law*, 37 William Mitchell Law Review 1(Fall 2010).

*Today’s Elderly in Bankruptcy and Predictions for the Elderly of Tomorrow*, 6 NAELA J. 1 (2010) (co-authored with Professor Theresa Pulley Radwan)

*The New Importance of Advance Directives*, 2 Estate Planning & Community Property Law J. 1 (2010).

*Introduction*, *The Uniform Guardianship & Protective Proceedings Act of 1997–Ten Years of Developments,* Stetson Law Review (Winter 2007).

*Elder Law in the United States: The Intersection of The Practice and Demographics*, 2 Journal of International Aging, Law & Policy 103 (Summer 2007).

*From the Elder-Friendly Law Office to the Elder-Friendly Courtroom–Providing the Same Access and Justice for All*, 2 NAELA J. 325 (2006).

*The Practical Aspects of Practicing Elder Law–Making Your Office Elder Friendly,* 38 ABA Fam. L. Q. 269 (Summer 2004).

*Ethical Issues in Representing the Demented Client*, 35 U. Ga. L. Rev. 735 (2001) (co-author).

*Health Care Decision-Making for Nursing Home Residents,* 31 McGeorge L. Rev. 733 (2000) (co-author).

Book Review, *Freedom to Die*, 40 Santa Clara L. Rev. 609 (2000).

*Last Rights? Confronting Physician-Assisted Suicide in Law and Society-Legal Liturgies on Physician-Assisted Suicide,* 26 Stetson Law Review 481 (1997) (co-author).

*Representing the Client who is Older in the Law Office and the Courtroom*, 2 The Elderlaw Journal 1 (1994) (co-author).

*The Right of the Dying to Refuse Life Prolonging Medical Procedures: The Evolving Importance of State Constitutions*, 18 Ohio Northern Law Review 467 (1992) (co-author).

*The Issue of Personal Choice-the Competent Incurable Patient and the Right to Commit Suicide*, 57 Missouri Law Review 1 (1992) (co-author).

*Deciding the Right to Die*, 20 Stetson Law Review 77 (1991).

*Constitutional Development of Judicial Criteria in Right to Die Cases -- From Brain Dead to Persistent Vegetative State*, 23 Wake Forest Law Review 721 (1988) (co-author).

*Florida Law and Feeding Tubes -- The Right of Removal*, 17 Stetson Law Review 109 (1987).

***OTHER PUBLICATIONS***

Book Review, *The Short and Happy Guide to Elder Law*, NAELA eBulletin (2013).

*Statutory Analysis of Changes to Medicare and Medicaid Laws as a Result of the Deficit Reduction Act of 2005*, pamphlet, special publication by Matthew Bender (2006)(co-author).

***BAR ADMISSIONS***

Admitted to practice before the courts in the state of Florida and the United States Supreme Court.

***SELECTED PRESENTATIONS***

***2023-2024 Academic Year***

*Missouri NAELA chapter: Case Law Update* (by Zoom 2023).

*Missouri NAELA Chapter: Elder Law Ethics* (by Zoom 2023).

*U. Tex. Special Needs Trust CLE; Ethics in SNT Administration (co-presenter)*(Austin, 2024).

*ABA/SLD Ethics in SNT Administration webinar (co-presenter)* (May, 2024).

*National College of Probate Judges Spring 2024 Conference; Fiduciary Abuse* (Jacksonsville May, 2024).

***2022-2023 Academic Year***

*Undue Influence, Diminished Capacity and Elder Abuse,* South West Florida Estate Planning Council Distinguished Speaker Series (Sarasota 2023).

*Case Law Update,* Missouri NAELA (December 2022).

*Missouri Elder Law Ethics* Missouri NAELA (December 2022).

*Elder Abuse,* USF Honors Colloquium (October 2022).

*Doing the Right Thing: Ethical Issues for CPAs, Financial Planners, Trustees & Lawyers in Elder Abuse, Undue Influence, and Capacity Cases****,***WEDU PBS and Community Foundation Tampa Bay, 16th Annual Estate and Tax Planning Seminar (virtual September 2022).

***2021-2022 Academic Year***

[*When Bad Things Happen: Elder Abuse & Undue Influence*](https://www2.stetson.edu/law-faculty-highlights/when-bad-things-happen-elder-abuse-undue-influence/), John Hopkins All Children’s Annual Estate Planning Seminar (Virtual February 2022)

*Introduction to Guardianship*, National Judicial College (Virtual April 2022)

*Introduction to Probate, Will Contests, Undue Influence, Family Dynamics*, National Judicial College (Virtual April 2022)

*2020-2021 Case Law Update, Missouri NAELA Chapter (*Dec. 2021)

*Ethics Bingo, Missouri NAELA Chapter (*Dec. 2021)

*A*[*ccess & Justice for All: Elder Law in the Courts*](https://www2.stetson.edu/law-faculty-highlights/access-justice-for-all-elder-law-in-the-courts/), National Judicial College (Virtual November 2021)

[*Case Law Update*](https://www2.stetson.edu/law-faculty-highlights/arkansas-elder-law-section-case-law-update/), Arkansas Elder Law Section (Virtual November 2021)

[*Family Matters: Ethics in an Elder Law Practice*](https://www2.stetson.edu/law-faculty-highlights/family-matters-ethics-in-an-elder-law-practice/), Arkansas Elder Law Section (Virtual November 2021)

***2020-2021 Academic Year***

*2020-2021 Case Law Update*, NAELA (Virtual Jan. 2021).

*Ethics in an Elder Law Practice*, Kansas Chapter NAELA (Virtual Apr. 2021).,

*Thinking Outside the Box: Eleazer Courtroom & Access to Justice*, ABA (Virtual Mar. 2021)

*Missouri Case Law Update*, Mo. NAELA Chapter (virtual (Jan. 2021).

***2019-2020 Academic Year***

*The Case Law Update,* 2020 SDF Family Law Center Virtual Symposium: The Current State of Elder Law (Depaul University, Chicago, IL Oct. 2020)

*The Intersection of Family Law & Elder Law,* 2020 SDF Family Law Center Virtual Symposium: The Current State of Elder Law (co-presenter) (DePaul University, Chicago, IL Oct. 2020)

*Bankruptcy and Elders*, Stetson Law webinar, Gulfport, FL Sept. 2020)

*Stetson College of Law 2019 COVID-19 webinar, consumer scams (June 2020).*

*Stetson College of Law 2019 COVID-19 webinar (panelist) (10-minute session on elder law issues in the time of COVID) (May 2020).*

*Bankruptcy and Elders webinar (co-presenter), Elder Law Answers (May 2020).*

*University of Tex. Annual SNT CLE; two sessions: PSNT Best Practices and SNT Ethics Jeopardy (Austin, TX Feb. 2020).*

*MO. NAELA Chapter, Case Law Update (St. Louis, December 2019.).*

*University of Texas Annual Elder Law CLE; Elder Law Ethics Jeopardy (Galveston Texas) (August 2019)).*

***2018-2019 Academic Year***

*NAELA Case law update* (panelist), NAELA Annual Meeting (Ft. Worth, Tx.).

*History of Financial Exploitation Prosecutions,* Annual Texas Adult Protective Services (co-presenter) (Corpus Christi, Tx.).

Moderator, AALS Aging & Law Section Annual Meeting (New Orleans).

*Advanced Medicare Issues*: NAELA Advanced Elder Law Review.

*Ethics in Elder Law (*with Professor Flowers): University of North Florida Estate Planning Council (Jacksonville, Fl).

*Contemporary Issues in Probate*: National Judicial College webinar.

*Red Flags in Elder Financial Exploitation* (co-presenter): Suncoast Estate Planning Council (St. Petersburg, Fl.)

*Paying for Long-Term Care* (Moderator): American Society on Aging Annual Meeting (New Orleans).

*Missouri Case Law Update*: Missouri NAELA Chapter (Kansas City, Mo.)

*Why High Net Worth Families Need to Know About Elder Law*: FOX Family Office Executive Directors’ Meeting (Miami, Fl.)

*Case Law Update,* NAELA Annual Meeting, (co-presenter) (New Orleans, LA. May 2018)

*National Judicial College: Probate Update* (Reno, NV. March 2018).

*5th Annual Australian Elder Abuse Conference*, Financial Exploitation Prosecutions in U.S. (Sydney, Australia February 2018)

*Case Law Update,* Mo. NAELA Annual Meeting (St. Louis, MO Nov. 2017)

*Case Law Update,* NAELA Annual Meeting, (co-presenter) (Boston, Mass. April 2017)

*Florida Judges College Advanced Judicial Studies,* Day long program on Guardianships (co-presenter) (Orlando, FL May 2016)

*Welcoming Elders to Your Courts*, D.C. Judges annual meeting (Philadelphia, PA May 2016)

*Elder Abuse; Guardianships & Alternatives*, Redstone Arsenal JAG Training (Huntsville, AL April 2016)

*Case Law Update,* NAELA Annual Meeting, (co-presenter) (Denver, CO. April 2016)

*End of Life Decision-Making,* NAELA Annual Meeting (Denver, CO. April 2016)

*Case Law Update*, U. Texas Annual SNT CLE (co-presenter) (Austin, TX. February 2016).

*Florida ACTEC Fellows Presentation on Elder Law,* Tampa Law Center (September 2015)

*Ethics in an Elder Law Practice,* Denver University College of Law bi-annual conference on elder law (Denver, CO. March, 2015).

*Case Law Update*, U. Texas Annual SNT CLE (Austin, TX. February 2015).

*Panel Presentation* AALS Aging & Law section (Washington, D.C. January 2015).

*Ethics in an Elder Law Practice, NAELA* Missouri Chapter (Kansas City, December 2014).

*Case Law Update*, (co-presenter) NAELA Annual Conference (Atlanta, GA. May 2014).

*The Practice of Law*,(co-presenter) NAELA Annual Conference (Atlanta, GA. May 2014).

*Ethics in an Elder Law Practice,* UMKC Estate Planning CLE (Kansas City, KS May 2014).

*Third World Congress on Guardianship (3 panels)*, (Washington D.C. May 2014).

*Special Needs Practice Workshop for JAGS* (moderator) (Redstone Arsenal, Huntsville, AL April 2014).

*Case Law Update*, Ok. Bar Elder Law Section (Ok. City, OK April 2014).

*Attorney Fees,* Ok. Bar Elder Law Section (Ok. City, OK April 2014).

*Being an Expert Witness*, American Society on Aging (co-presenter) (San Diego, CA. March 2014)

*Case Law Update*, U Tx. 10th Annual SNT Conference (Austin, Tx. February 2014).

*Attorney Fees & Ethics*, U Tx. 10th Annual SNT Conference (Austin, Tx. February 2014).

*Ethics for Fiduciaries*, So. Az. Estate Planning Council (Tucson, AZ. February, 2014).

*Making Your Office Elder Friendly*, Tucson Elder Law Attorneys (Tucson, AZ. February 2014).

*Public Benefits 101*, U. Miami Heckerling Estate Planning CLE (co-presenter) (Orlando, FL January 2014).

*Ethics in the Practice of Elder Law*, Florida Bar Elder Law Section (co-presenter) (Orlando, Fl. January 2014).

*Panel Presentation*, International Elder Law Conference with Veterans’ emphasis (Honolulu, HI. November 2013).

*Elder-Friendly Offices*, NAELA Institute (panelist) (Washington, D.C. November 2013).

*The Future of Aging*, Robert H. McKinney School of Law, Local Government Symposium (keynote) (October 2013).

*Case Law Update,* Alaska Elder Law section (Anchorage, Alaska September 2013).

*Future of Elder Law*, Pa. Elder Law Institute (Harrisburg, PA. July 2013)

*Case Law Update*, Missouri NAELA Chapter SNT CLE (St. Charles, MO. April 2013).

*Ethical Considerations in Elder Law*, (co-presenter) Ohio State Bar Elder Law Institute (Columbus, OH. Mar. 2013).

*Future of Elder Law Practice*, ElderCounsel (Las Vegas, NV Mar. 2013).

*Ethics in an Elder Law Practice*, (co-presenter) ElderCounsel (Las Vegas, NV Mar. 2013).

*Case Law Update*, (co-presenter) U. Texas SNT CLE (Austin, TX. Feb. 2013).

*Ethics of Elder Law Practice,* 2012 Missouri Elder Law Fundamentals Institute (Kansas City, MO. Dec. 2012).

*Communicating with Clients with Diminished Capacity* (co-presenter), 2012 Canadian Conference on Elder Law (Vancouver, B.C. Nov. 2012).

*Reporting In, Reporting Out: Updates from the 3rd National Conference on Guardianships and the World Congress on Guardianships* (co-presenter) 2012 Canadian Conference on Elder Law (Vancouver, B.C. Nov. 2012).

*There is no I in Team: The Ethical Elder Law Team* (co-presenter), NAELA National Aging & Law Institute (Washington, D.C. Nov. 2012).

*Finances and Fiduciaries: Diminished Capacity and Diminishing Resources in a Post-Election World* (co-presenter), NAELA National Aging & Law Institute (Washington, D.C. Nov. 2012).

*The Future of Guardianship and the Guardianship Family,* Kentucky Guardianship Assoc. (Covington, KY Oct. 2012).

*Guardianship and End of Life Issues* (co-presenter) Kentucky Guardianship Assoc. (Covington, KY Oct. 2012).

*Open Forum on Guardianship* (panelist) Kentucky Guardianship Assoc. (Covington, KY Oct. 2012).

*Ethics in an Elder Law Practice* (co-presenter), Co. Bar Elder Law Section (Vail, Co. Aug. 2012).

*Five Tips for an Ethical Elder Law Practice* (co-presenter), Maine State Bar Elder Law Section (Augusta, ME Sept. 2012).

*Ethical and Effective Representation of Clients with Diminished Capacity*, (co-presenter), Maine State Bar Elder Law Section (Augusta, ME Sept. 2012).

*Ethics in an Elder Law Practice* (co-presenter), Arizona NAELA Chapter (Phoenix, AZ. Sept. 2012).

*Ethics in an Elder Law Practice* (co-presenter), Co. Bar Elder Law Section (Vail, Co. Aug. 2012).

*Future of Elder Law Practice*, Co. Bar Elder Law Section (Vail, Co. Aug. 2012).

*Future of Elder Law Practice*, Alaska Bar Elder Law Section (Anchorage April 2012).

*Ethics in the Elder Law Practice*, Alaska Bar Elder Law Section (Anchorage April 2012).

*NAELA Aspirational Standards* (co-presenter), NAELA Annual Meeting (Seattle, April 2012).

*Case Law Update* (co-presenter), NAELA Annual Meeting (Seattle, April 2012).

*Elder-Friendly* Courts, Chicago Elder Courts Division Dedication (Chicago, March 2012).

*Future of Elder Law Practice*, State Bar Elder Law Section (New Orleans, April 2012).

*Ethics in the Elder Law Practice* (co-presenter), State Bar Elder Law Section (New Orleans, April 2012).

*Ethics in the Elder law Practice* (co-presenter), Ohio State Bar Elder Law Section CLE (Dayton, March 2012).

*Professionalism in the Elder Law Practice*, West Pasco Co. Bar Association (New Port Richey, March 2012).

*Case Law Update*, (co-presenter) U. Texas SNT CLE (Austin, February 2012).

*Five Commandments of Elder Law Ethics*, (co-presenter) Florida Bar Elder Law Section Certification Review (Orlando, January 2012).

*A Futurist View of the Practice of Elder Law* (panelist) NAELA 2011 Institute (Boston, MA, November, 2011).

*Elder Law Ethics*, (co-presenter), Academy of Florida Elder Law Attorneys (AFELA) (Orlando, December, 2011)**.**

*Teaching Ethics in Elder Law*, (panelist) Southern Association of Law Schools (SEALS) (August, 2011).

*Ethical Issues in Elder Law: Getting It Right*,) (co-presenter) ABA Webinar (June, 2011).

*2010-2011 Case Law Update*, NAELA 2011 Symposium co-presenter) (Las Vegas, NV) (May, 2011).

*Ethics in an Elder Law Practice,* (co-presenter) N.C. Bar Foundation Elder Law CLE, Cary, N.C. (February, 2011).

*Ethics in an SNT Practice,* U. Texas Annual Special Needs Trust Conference, Austin, TX. (January 2011)(panelist).

*Elders in Bankruptcy and Health Reform*, National Aging and Law Conference, Washington, D.C. (December, 2010) (panelist).

*Future of Elder Law,* Washington State Chapter of NAELA Annual Meeting, Seattle, Washington (November, 2010).

*Guardianships in the United States*, 2010 Canadian Conference on Elder Law, Toronto, Canada (October, 2010) (panelist).

*Guardianships in the United States*, World Congress on Adult Guardianships, Yokohama Japan (October, 2010) (keynote).

*2009-2010 Case Law Update*, (co-presenter) NAELA 2010 Symposium (Orlando, FL) (May, 2010).

*How to Take the Test*, (co-presenter) NELF Certification Review Panel Discussion (Orlando, FL.)(May, 2010).

*Ethics Issues in an Elder Law Practice,* (co-presenter) Florida Bar Elder Law Section Public Benefits CLE (Tampa, FL.)(March 2010).

*SNT Case Law Update,* (co-presenter) U. Tx. Annual SNT CLE (Austin, Texas) (February, 2010).

*Older Americans’ Act Reauthorization*, AoA Listening Session (Dallas, Texas) (February 2010).

*The New Importance of Advance Directives*, Estate Planning & Community Property Law Journal at Texas Tech Law School CLE (Lubbock, Texas.) (February, 2010).

*Five Commandments of Elder Law Ethics*, (co-presenter) Florida Bar Elder Law Section Certification Review (Orlando, FL.)(January, 2010).

*Ethics in an Elder Law Practice*, Spokane County Guardian *ad Litem* CLE (Spokane, Washington) (October 2009).

*Advance Directives*, National College of Probate Judges Fall Meeting (Rockport, Maine) (October, 2009).

*2009 Case Law Update*, NAELA Symposium (Washington, D.C.)(April 2009) (co-presenter).

*SNT Case Law Update,* U. Tx. Annual SNT CLE (Austin, Texas) (February 2009) (co-presenter).

*Ethics in an Elder Law Practice*, Illinois Bar Elder Law Section (Chicago, Il.)(December 2008) (co-presenter).

*Special Needs Trusts & Guardianships*, Canadian Conference on Elder Law (Vancouver, B.C.)(November 2008) (co-presenter).

*Case Law Update*, NAELA (Washington, D.C., April 2009) (co-presenter).

*Special Needs Trusts Case Law Update*, U. of Texas (Austin, February 2009) (co-presenter).

*Ethics in an Elder Law Practice*, Illinois Bar Elder Law Section (Chicago December 2008) (co-presenter).

*Special Needs Trusts & Guardianships*, Canadian Conference on Elder Law (Vancouver November 2008) (co-presenter).

*Theories in Ageing-Panelist*, World Study Group (Vancouver, November 2008).

*Elder Abuse*, National Judicial College (Charleston, November, 2008).

*The Court’s Role in End of Life Decision-Making*, National Judicial College (Charleston, November, 2008).

*Ethical Issues in Elder Law*, National Judicial College (Charleston, November, 2008).

Moderator*, Emerging Issues for Returning Veterans* (October, Eleazer Courtroom).

*The Social Security Alphabet*, University of Texas Elder Law Program (Galveston, August 2008) (co-presenter).

*Case Law Update*, NAELA Symposium (Maui, Hi) (May 2008) (co-presenter).

*Ethics Issues in Document Drafting (Good Ethics=Good Business)* NAELA Symposium (Maui, HI May 2008) (co-presenter).

*Cross-Border Issues in Late in Life Planning*, NAELA Symposium (moderator) (Maui) (May 2008).

*Ethics in an Elder Law Practice,* Mo. NAELA Chapter (Branson, Mo.)(April 2008) (co-presenter).

*Case Law Update*, Mo. NAELA Chapter (Branson, Mo.)(April 2008) (co-presenter).

*Protocol for Dying*, National Council on Aging/American Society on Aging Annual Meeting (Washington, D.C.) (March 2008) (co-presenter).

*Ethics in Guardianship Practice,* Virginia Guardianship Assoc. Annual Meeting (April, 2008) (Richmond, VA) (co-presenter).

*Guardians’ Liability when Wards Have Consensual Relations*, Virginia Guardianship Assoc. Annual Meeting (April, 2008) (Richmond, VA) (co-presenter).

*Ethics In an Elder Care Practice,* Tampa Bay Estate Planning Council (Tampa) (January 2008).

*SNT Case Law Update,* U. Tx. Annual SNT CLE (Austin) (January 2008) (co-presenter).

*Elder Law Update*, Suncoast Estate Planning Council (January 2008).

*Ethics in an Elder Law Practice,* National Academy of Elder Law Attorneys webinar (December 2007) (panel).

*The Politics of Dying*, Academic Lecture, International Conference on Aging, Canadian Centre for Elder Law Studies (Vancouver, B.C.)(Nov. 2007).

*Elder Abuse*, Academic Lecture, International Conference on Aging, Canadian Centre for Elder Law Studies (Vancouver, B.C.)(Nov. 2007).

*Elder Law: The Past, Present & Future*, Keynote, National Aging & Law Conference (Washington, D.C.)(Oct. 2007).

*Ethics in an Elder Law Practice*, National Aging & Law Conference (Washington, D.C.)(Oct. 2007).

*Durable Powers of Attorney*, National Aging & Law Conference (Washington, D.C.)(Oct. 2007).

*Guardians’ Liability when Wards Have Consensual Relations,* National Guardianship Association, Annual Meeting (San Antonio, TX.)(Oct. 2007).

*Ethics in an Elder Law Practice*, keynote, Washington State Bar Elder Law Section (Seattle, WA.)(Sept 2007).

*Elder Abuse*, Current Issues, National Judicial College (Bar Harbor, Me.)(Sept. 2007).

*End of Life Decision-Making*, Current Issues, National Judicial College (Bar Harbor, Me.)(Sept. 2007).

*Elders in the Courts*, Current Issues, National Judicial College (Bar Harbor, Me.)(Sept. 2007).

*Ethics in Elder Law Practice*, Missouri NAELA Program (Branson, Mo.)(May 2007).

*Case Law Update*, Mo. NAELA Program (Branson, Mo.)(May 2007).

*Guardians’ Liability when Wards Have Consensual Relations,* NAELA Symposium (Cleveland, Oh.)(May 2007).

*Case Law Update*, (NAELA Symposium (Cleveland, Oh. May 2007).

*Ethics in an Elder Law Practice,* Fundamentals of Elder Law (Fla. Bar, Apr. 2007)

*Ethics in Guardianship Practice*, Florida NAELA Chapter Elder Concert (Tampa, Fl.)(Mar. 2007).

*Guardianship Update, Florida* NAELA chapter Elder Concert (Tampa, Fl.)(Mar. 2007)

*Case Law Update,* U. Texas SNT CLE (Austin, TX.)(Feb. 2007).

*Consumer Protection & Elders* (Keynote), Canadian Centre for Elder Law Studies Annual Conference, (Vancouver, B.C.)(Oct. 2006).

*Elder Consumer Protection*, National Committee for the Prevention of Elder Abuse Annual Abuse Conference (California) (Sept. 2006).

*Future of Elder Law (*National College Probate Judges, (Anchorage, Alaska) (Sept. 2006).

*Issues of Aging*, Tenn. NAELA, (Nashville, Tn.)(Aug. 2006).

*Dementia and the Law,* American Gerontological Society, (May 2006) (Chicago, Il.) (co-presenter)

*Elder Law Ethics*, Academy of Florida Elder Law Attorneys (May 2006) (Tampa, Fl.) (co-presenter).

*History of Patient Choice*, End of Life Program, (April, 2006) (Sarasota, Fl) (panelist).

*Case Law Update*, Florida Bar Elder Law Section (April, 2006) (Orlando, Fl).

*Consumer Scams vs. Elders,* NAELA (April, 2006) (Washington, D.C.) (co-presenter).

*Case Law Update*, NAELA (Washington, D.C., April 2006) (co-presenter).

*Bankruptcy & Elders* NAELA (Washington, D.C.)(April, 2006) (with Dean Radwan).

*Elder Law Ethics,* National Aging & Law Conference (Washington, D.C.)(April 2006) (co-presenter).

*Consumer Scams vs. Elders,* National Aging & Law Conference (Washington, D.C.)(April 2006) (co-presenter).

*Elder Law Ethics*, Elder Consumer Protection CLE for legal services attorneys Elder Law Ethics (Stetson campus) (January, 2006) (co-presenter).

*Ethics in Elder Law/Estate Planning,* Colorado State Bar (Snowmass, Co.)(January 2006).

*Clifton J. Kruse Jr. Keynote Speech on Professionalism*, NAELA (Tucson, AZ) (December 2005) (co-presenter).

*Case Law Update*, NAELA Symposium (San Francisco, Calif.)(May, 2005– SF)(co-presenter).

*Sex & Wards–the guardian’s obligations & Liabilities* (Spring, 2005) (Sarasota, Florida).

*Ethics in Elder Law*, NAELA Institute (November, 2004) (Colorado Spring, Colorado) (panel).

*Ethics in an Elder Law Practice,* Va. Bar Elder Law program (October, 2004) (co-presenter)

*Aging Academics & the Academy*, SEALS (August 2004) (panel).

*Ethics in an Elder Law Practice,* Ga. Legal Services Developers annual program (3 presentations) (co-presenter) (May, 2004).

*Ethical Issues in an Elder Law Practice,* Tucson Arizona Estate Planning Council, (Tucson, Az.)(April 2004).

*Ethical Issues in Representing Clients With Diminished Capacity*, Fundamentals of Elder Law CLE, Florida Bar Elder Law Section (Tampa, Fl.)(April, 2004).

*Case Law Update*, Public Benefits CLE, Florida Bar Elder Law Section (co-presenter) (Tampa, FL) (April 2004).

*Ethics in an Elder Law Practice,* NAELA *(*co-presenter) (Dallas, TX.)(November 2003).

*Ethics in an Elder Law Practice*, National Aging & Law Conference (NALC)(co-presenter) (Washington, D.C.)(October 2003).

*Case Law Update,* NAELA(co-presenter) (Miami Beach, FL) (May 2003).

*Ethical Issues in an Elder Law Practice,* NAELA (co-presenter) (Miami Beach, FL) (May 2003).

*Ethical Issues in Elder Law Litigation*, ABA Litigation Section (co-presenter) (Houston, TX. April, 2003).

*Case Law Update*, Public Benefits CLE, Florida Bar Elder Law Section (Cocoa Beach, FL) (January 2003).

*Elder Law in Today’s Courts: Elder Abuse* (St. Petersburg Beach, Florida) (January 2003).

*Elder Law in Today’s Courts: Physician-Assisted Suicide and the Right to Die* (St. Petersburg Beach, Florida) (January 2003).

*Case Law Update,* NAELA(co-presenter) (Baltimore, MD) (April 2002).

*Wingspan Presentation* (co-presenter) (Baltimore, MD) (April 2002).

*Ethics in Long-term Care Settings* (co-presenter) (Tampa, FL.)(June 2001).

*Ethics and Professionalism in Elder Law* (panel) (Miami, FL June 2001).

*Elder Abuse* (Broward Task Force on Elder Abuse) (Ft. Lauderdale, FL) (November 2000).

*Ethics in an Elder Law Practice,* NAELA Institute (panelist) (Colorado Springs, Co.)(November 2000).

*Drafting Advance Directives*, ABA RPPTL Section, (panelist) (New York, NY) (July 2000).

*Emerging Issues in Bioethics & Judicial Immunity*, National Judicial College-General Jurisdiction Course (Reno, NV. (July 2000, July 1999 and October 1998).

*Case Law Update*, NAELA (Philadelphia, PA) (May 2000).

*Ethics in an Elder Law Practice,* NAELA (Philadelphia, PA) (May 2000).

*Case Law Update*, Public Benefits CLE, Florida Bar Elder Law Section (Orlando, FL) (April 2000).

*Ethics in an Elder Law Practice*, Florida Bar Elder Law-RPPTL Sections (Tampa, FL) (March 2000).

*End of Life Issues*, National College of Probate Judges (Phoenix, AZ) (November 1999).

*Emerging Issues in Bioethics and Judicial Immunity*, National Judicial College-General Jurisdiction Course, (Reno, NV.)(October and July 1999).

*Guardianship and Fiduciary Liability*, Arizona Bar Elder Law Section (Prescott, AZ) (September 1999).

*Physician-Assisted Suicide*, National Judicial College-General Jurisdiction Course, (Reno, NV) (August 1999).

*Case Law Update*, Florida Probate Judges (Ft. Meyer, FL) (June 1999).

*Elder Abuse*, NAG Task Force (Deerfield Beach, FL) (March 1999).

*Ethics in an Elder Law Practice* (Chicago, IL.)(March 1999).

*Elder Law Update,* Florida Bar Elder Law Section, (Howey in the Hills, FL) (January 1999).

*Guardianship Update*, NAELA Institute (panelist) (Washington, DC) (November 1998).

*Emerging Issues in Bioethics* and *Judicial Immunity*, National Judicial College-General Jurisdiction Course, (Reno, NV) (October 1998).

*Medicare Part C* and *Ethics in an Elder Law Practice*. PESI (Ft. Lauderdale, FL, and Tampa, FL) (October 1998)

*Medicare Part C and Federal Law Update*, PESI (Honolulu, HI) (September 1998)**.**

*Physician-Assisted Suicide* (National Judicial College-Appellate Judges Course, Reno, NV) (August 1998).

*Advance Directives and the Right to Die*, Pinellas County Estate Planning Council, (St. Petersburg, FL) (May 1998).

*Death by Design: When & How an Individual Can Be Assisted in Dying*, Hospice of Southwest Florida (panelist) (Sarasota, FL) (April 1998).

*Emerging Issues in Torts and Medical/Legal Liability & Judicial Immunity*, National Judicial College-General Jurisdiction Course (Reno, NV) (September 1997).

*Physician-Assisted Suicide*, Hospice of Pinellas County (panelist) (Largo, FL) (February and June 1997)**.**

*Physician-Assisted Suicide*, Florida Geriatric Care Managers, (Deerfield Beach, FL) (May 1997)**.**

*Elder Law Update*, NAELA Symposium (panelist) (Las Vegas, NV) (May 1997)**.**

*The Ethics of Right to Die Cases*, University of South Florida Gerontology and Ethics class, (Tampa, FL) (February 1997, February 1995, January 1994, February and April 1993, March 1992).

*Elder Law Update***,** NAELA Institute (panelist) (Tucson, AZ, November 1996)**.**

*Ethics and the Elderly*, NAAG (St. Petersburg Beach, FL) (October 1996).

*Physician-Aided Dying*, ABA Annual Meeting, Real Property, Probate & Trust Division (panelist) (Orlando, FL) (August 1996)**.**

*Emerging Issues in Torts and Medical/Legal Liability & Judicial Immunity*, National Judicial College-General Jurisdiction Course, (Reno, NV) (April 1996).

*Elder Law-Current Issues in Civil Litigation*, National Judicial College (Phoenix, AZ) (February 1996).

*Elder Law Update*, NAELA Institute (panelist) (Denver, CO) (November 1995)**.**

*Teaching Elder Law*; *Revisions to the Uniform Guardianship and Protective Proceedings Act;* and *Ethics in an Elder Law Practice* (three sessions), Joint Conference on Law and Aging (Washington, DC) (October 1995).

*Emerging Issues in Torts and Medical/Legal Liability & Judicial Immunity,* National Judicial College-General Jurisdiction Course, (Reno, NV) (September 1995).

*Protecting Vulnerable Elderly***,** ABA Annual Meeting, Senior Lawyers Division (panelist) (Chicago, Ill.)(August 1995)**.**

*Building Coalitions**to Protect Vulnerable Elderly*,Department of Elder Affairs-Building Coalitions (panelist) (Lake Yale, FL) (May 1995).

*Physician-Aided Dying,* American Society on Aging Annual Meeting (panelist) (Atlanta, GA) (March 1995).

*Access to Justice for Seniors*, ABA Litigation Section, Mid-Year Meeting (Miami, FL) (February 1995)**.**

*Inter-generational Warfare*, Stetson University, Business III Class (DeLand, FL) (February 1995).

*Health Care Issues for Older Workers ,* Stetson University, Executive Briefing (panelist) (Daytona Beach, FL)(February 1995).

*Ethics and Guardianship,* Florida State Guardianship Association, Annual Meeting (Ft. Lauderdale, FL) (November 1994).

*Teaching Elder Law Across the Curriculum* and *Physician-Aided Dying* (two sessions), Joint Conference on Law and Aging (Washington, DC) (October 1994).

*Surrogate Decision-Making and the Court's Role in Termination of Treatment Cases*, National Judicial College-Current Issues in Civil Litigation Course (Reno, NV) (July 1994).

*Teaching Ethics in Law School*, Stetson University, Applied Ethics Program (DeLand, FL) (June 1994).

*Elder Law and Autonomy*, Stetson University, Religion and Decision-Making Class (DeLand, FL) (June 1994).

*Elder Law Issues*, WCEU, At Issue (Daytona Beach, FL) (June 1994).

*Elder Law Update*, National Academy of Elder Law Attorneys (Seattle, WA) (May 1994).

*Physician-Aided Dying-Moral, Ethical and Legal Considerations*, National Council on Aging Annual Meeting (panelist) (Washington, DC) (April 1994).

*Trends in Civil Litigation* and *Professional Liability* (two sessions), National Judicial College-General Jurisdiction Course (Reno, NV) (April 1994).

*Teaching Elder Law in Law School, Using a Problem Approach*; *Health Care Reform*; *Law School Elder Law Programs* (three sessions), Joint Conference on Law and Aging (panelist) (Washington, DC)(October 1993).

*Competency and Decision-Making Issues in Guardianship and Health Care Decision-Making Cases*, ABA Annual Meeting–Real Property, Probate and Trust Section (panelist) (New York, NY) (August 9, 1993).

*Surrogate Decision-Making and the Court's Role in Termination of Treatment Cases*, National Judicial College–Current Issues in Civil Litigation Course (Reno, NV, July 1993).

*Frontiers of Medical Ethics-End of Life Issues*, The Florida Center for Teachers (DeLand, FL) (June 1993).

*Living Wills and Termination of Medical Treatment*, Sarasota County Medical Society Risk Management Seminar (Sarasota, FL) (May 1993).

*After The Drafting -- The Enforceability of Advance Directives*, National Academy of Elder Law Attorneys Fifth Annual Symposium (panelist) (Atlanta, GA) (April 1993).

*Ethical and Legal Problems of the Elderly*, University of South Florida Ethics Class (St. Petersburg, FL) (April 1993).

Quality of Life Workshop; *Panel Presentation on Euthanasia* for intergenerational audience (St. Petersburg, FL) (February 1993).

*Law Schools and Elder Law*, Joint Conference on Law and Aging(panelist) (Washington, DC) (October 1992).

*Chapter 765: Advance Directives in Florida*, Clearwater Bar Real Property, Probate and Guardianship Section (panelist) (Clearwater, FL) (December 1992)**.**

*Surrogate Decision-Making*, Stetson University College of Law Second Annual Elder Law CLE (St. Petersburg, FL) (September 1992) (Also Conference Chair).

*Advance Directives,* Unit Administrators Meeting for Florida Region, Community Dialysis Centers, Inc. (Clearwater, FL) (September 1992).

*Surrogate Decision-Making and the Court's Role in Termination of Treatment Cases*, National Judicial College–General Jurisdiction and Current Issues in Civil Litigation Courses (Reno, NV) (July 1992).

*The Medical-Legal Family Dynamic in the Decision to Terminate Life Support for the Elderly Patient*, National Academy of Elder law Attorneys Fourth Annual Symposium (panelist) (San Francisco, CA)(May 1992).

*Surrogate Decision-Making and the Court's Role*, National Judicial College, 13th Annual Eastern Regional Conference–Access Issues for Aged and Disabled Americans (Princeton, New Jersey) (May 1992).

*The Ethics of Right to Die Cases* University of South Florida Gerontology and Ethics class (Tampa, FL) (March 1992).

*Making the Law Work for You* Black Law Students Association (panelist) (St. Petersburg, FL) (February 1992).

*Death and Dying: The College of University's Legal Responsibilities as to Terminally Ill Persons*, Stetson College of Law Thirteenth Annual National Conference on Law and Higher Education, panelist (Clearwater, FL)(February 1992).

*Consumer Scams, How to Recognize and Avoid Them*; *Ethical Problems in Representing Clients with Diminished Capacity* (two sessions), Stetson College of Law First Annual Elder Law CLE (St. Petersburg, Fl.)(1991).

*Guardianship Reform*, Joint Conference on Law and Aging (panelist) (Washington, DC) (October 1991).

*Crime & the Elderly*, Stetson College of Law CLE (St. Petersburg, FL) (February 1989).

*Life-Prolonging Measures, Ethics and the Law*, Hospice (St. Petersburg, Fl.)(August 1986).

***SELECT PROFESSIONAL ASSOCIATIONS AND ACTIVITIES***

* Center for Medicare Advocacy, Board of Directors, 2012-ongoing, Treasurer, 2015-2020.
* American Society on Aging, Board of Directors, 2017-2020.
* NAELA Foundation, Board of Trustees, 2016-2020.
* American Law Institute 2009-ongoing.
* Florida Department of Children & Families, Advisory Panel on Adult Protective Services, chair 2008-2011.
* National Judicial College Faculty 1992- ongoing.
* National Academy of Elder Law Attorneys, President 1998-1999
* National Academy of Elder Law Attorneys, Council of Advanced Practitioners, Vice-Chair 2011
* National Academy of Elder Law Attorneys Foundation Trustee 2011
* National Senior Citizens Law Center, Board of Directors 1997-2003, President, 2000-2002
* Florida Bar Elder Law Section Chair, 1994-1995
* Reporter, Uniform Guardianship & Protective Proceedings Act
* ABA Real Property, Probate and Trust Health Care Decisions Comm. Co-Chair
* American College of Trusts & Estates Council
* Attorney General's Task Force on Elder Abuse 1988
* USF Institute on Aging Associate Member
* ABA Commission on Law & Aging, Commissioner 1998-2001
* State Long-Term Care Ombudsman State Council 1999-2002
* Florida Supreme Court Access to Courts Committee Disabled and Elderly People
* Academic Advisory Board for the Borchard Center for Law and Aging
* Sixth Judicial Circuit Elder Law Committee, Chair, 2002
* Academy of Florida Elder Law Attorneys, Board of Directors 1993-1996
* Florida Supreme Court Committee on Rule-Making Process 1997-1998
* Senior Sleuths Board Member, 2001-2004
* City of St. Petersburg, Commission on Aging, 1995-1996
* Florida Bar Committee on the Elderly, 1981-1991, Chair, 1986-88
* AALS Law & Aging Section, Chair, 1995
* ABA Law Student Division, Client Counseling Faculty Committee 1993-1996, 2000
* All Children’s Hospital Ethics Committee 1987-1988
* Florida Supreme Court Long-Long-Range Planning Task Force, Probate and Guardianship
* Florida Legislative Study Commission on Guardianship Reform 1988-1990