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Elder Law: What You Need To Know
Meeting the Legal, Financial, and Social Challenges of Aging Clients
Cosponsored by the ABA Senior Lawyers Division
January 17-18, 2008
Coral Gables, Florida

PROGRAM

Thursday, January 17, 2008
7:45 a.m. Registration and Continental Breakfast
8:45 a.m. Introductory Remarks and Course Overview
9:00 a.m. What Is Elder Law and Federal Benefit Programs: Social Security and Medicare — Mr. Burke and Professor Frolik
10:00 a.m. Networking Break
10:15 a.m. Basic Medicaid: Paying for Nursing Home Care — Ms. Waldoch
11:15 a.m. Medicaid Application and Financial Planning for Long-Term Care — Mr. Burke and Ms. Waldoch
12:15 p.m. Lunch Break
1:45 p.m. Long-Term Care Insurance and Medicaid Planning — Messrs. Burke and Gallant
2:45 p.m. Networking Break
3:00 p.m. Income Only Trust and Medicaid — Professor Frolik and Ms. Whitenack
4:00 p.m. Special Needs Trusts — Mr. Gallant and Ms. Schmitt-Smith
5:00 p.m. Adjournment for the Day

Friday, January 18, 2008
8:00 a.m. Continental Breakfast and Workshops (not webcasted)
- State Implementation of the DRA: New York, New Jersey, and Florida — Mr. Krooks and Ms. Whitenack
- Durable Powers of Attorney for Assets and Health Care — Messrs. Burke and Gallant
- Housing Options for the Older Client (Including Contracts with Assisted Living Facilities, Nursing Homes, and Continuing-Care Retirement Communities (CCRCs)) — Professor Frolik and Ms. Schmitt-Smith
9:00 a.m. Basic and Advanced Documents — Mr. Gallant and Ms. Schmitt-Smith
10:00 a.m. Advanced Medicaid Planning, Part I — Messrs. Johns and Krooks and Ms. Whitenack
11:00 a.m. Networking Break
11:15 a.m. Advanced Medicaid Planning, Part II — Messrs. Johns and Krooks and Ms. Whitenack
12:15 p.m. Lunch Break
1:45 p.m. Attracting and Dealing with Older Clients and Their Families — Mr. Burke and Ms. Schmitt-Smith
2:45 p.m.  Ethics and Professional Responsibility  
— Professor Frolik and Messrs. Burke, Gallant, and Johns

3:45 p.m.  Networking Break

4:00 p.m.  Case Studies: Bringing It All Together — Professor Frolik; Messrs. Burke, Gallant, Johns, and Krooks; Mss. Schmitt-Smith and Whitenack

5:00 p.m.  Adjournment
ALI-ABA Course of Study

Elder Law: What You Need To Know
Meeting the Legal, Financial, and Social Challenges of Aging Clients

Cosponsored by the ABA Senior Lawyers Division

January 17 - 18, 2008
Coral Gables, Florida

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Publications Include: *BOOMER BASICS: EVERYTHING YOU NEED TO KNOW ABOUT THE ISSUES FACING YOU, YOUR CHILDREN, AND YOUR PARENTS* (Co-Author) (McGraw Hill, 2000); *A LEGAL MANUAL FOR PHYSICIANS* (Co-Editor and Author) (NYSBA/Medical Society of the State of New York, 2006)

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Fellowships: American College of Trust and Estate Counsel; American Bar Foundation Memberships: American Bar Association (Bioethics Committee; Chair, Torts and Insurance Practice Section Seniors Issue Committee, 2002-03); Pennsylvania Bar Association (Chair, Elder Law Section, 2001-03); Allegheny County Bar Association; National Academy of Elder Law Attorneys; Past President, American Association of Law Schools (Section of Law and Aging); Past President, Pennsylvania Developmental Disabilities Advocacy Council
Publications Include: *THE LAW OF LATER-LIFE HEALTH CARE AND DECISION MAKING* (ABA, 2006); *LAW OF EMPLOYEE PENSION AND WELFARE BENEFITS* (Co-Author) (LexisNexis, 2004); *ELDER LAW IN A NUTSHELL* (Co-Author) (West, 3d Ed., 2003); *ELDER LAW: CASES AND MATERIALS* (Co-Author) (LexisNexis 3d Ed., 2003); *AGING AND THE LAW READER* (Editor) (Temple University Press, 1999); *ADVISING THE ELDERLY OR DISABLED CLIENT* (Co-Editor) (Warren, Gorham & Lamont, 2d Ed., 1999 and Supps.); *LAW & EVOLUTIONARY BIOLOGY* (Editor) (Gruter Institute, 1999); *RESIDENCE OPTIONS FOR OLDER OR DISABLED CLIENTS* (Warren, Gorham & Lamont, 1997); *COUNSELING THE OLDER CLIENT* (Co-Editor) (ALI-ABA, 1997); *FEDERAL TAX ASPECTS OF DAMAGE, INJURY AND LOSS* (BNA, 1987); *PENNSYLVANIA ELDER LAW MANUAL* (Co-Editor) (Legal Services Corp. of America, 1987); *NAELA JOURNAL* (Executive Editor)
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Fellow, American College of Trust and Estate Counsel (Fiduciary Litigation Committee; Elder Law Committee; Represenative to National Guardianship Network); Connecticut Bar Foundation

Memberships: Connecticut Bar Association (Past Chair, Estates & Probate Section; Executive Committee, Elder Law Section; Animal Law Committee); National Academy of Elder Law Attorneys; Center for Medicare Advocacy (Board of Directors); New Haven Free Public Library (Board of Trustees)


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Memberships: National Academy of Elder Law Attorneys (Fellow; President, 1999-2000; Chair, Council of Advanced Practitioners, 2006-07; Past Editor, NAELA QUARTERLY; NAELA JOURNAL Editorial Board); National Guardianship Association (Charter Board Member); North Carolina Bar Association (Charter Chair and Council member, Elder Law Section); Society of Settlement Planners (Charter Associate); Alzheimer’s Association (President, Western Carolina Chapter, 2005-07, and Board); Society of Financial Service Professionals (Board of Directors, 2006-09); Charlotte Mecklensburg Seniors Centers (Board of Directors, 1998-2005); Tristan’s Quest – Advocacy for Children with Mental Illness (Board of Directors); Corporation of Guardianship, Inc. (Board of Directors); Senior Resources of Guilford (Board and President Elect, 2007)

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Publications Include: Creative Advocacy in Guardianship Settings: Medicaid and Estate Planning Including Transfer of Assets, Supplemental Needs Trusts and Protection of Disabled Family Members, in GUARDIANSHIP PRACTICE IN NEW YORK STATE (New York State Bar Association); Co-Editor, Legislative News column and former co-editor, Fair Hearing Corner column, THE ELDER LAW ATTORNEY (New York State Bar Association - Elder Law Section)

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Accredited Investment Fiduciary Fellow, Academy of Elder Law Attorneys (Board of Directors)
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Memberships: Academy of Florida Elder Law Attorneys (Co-Chair, Public Policy Task Force); National Academy of Elder Law Attorneys (Board of Directors, 2002-04; Council of Advanced Practitioners; Guardianship, Trust and Practice Development Special Interest Group; Past Chair, Advocacy/Litigation Special Interest Group; Past Member, Public Policy Committee, Finance Committee, 2003 Symposium Committee, and the NAELA Fellows Selection Committee; guest editor for the Summer 2003 NAELA Quarterly); Academy of Florida Elder Law Attorneys (Director, 1999-2003); Florida State Guardianship Association (Past chair, Legislative Committee; Past Director); Big Bend Hospice, Inc. (Board of Directors); Tallahassee Senior Center (Board of Directors); Tallahassee Alzheimer Resource Association; Capital Coalition of Aging; Center for Special Needs Trust Administration, Inc. (Past Director); Berkshire Trust Advisory (Shareholder); Special Needs Alliance; Florida Bar Association (Past Chair, Elder Law Section; Past Chair, Legislative Committee); Life Care Planning Law Firm Association (Director; Steering Committee)

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Government and Public Service: Law Secretary to the Honorable Melvin P. Antell (N.J. App.); Faculty, Superior Court of New Jersey Judicial College
Memberships: NJICLE (Board of Trustees); Guardianship Association of NJ (Board of Trustees); Special Needs Alliance; New Jersey State Bar Association (Past Chair, Elder and Disability Law Section; Nominating Committee); American Bar Association (Litigation Section; Probate Committee); Morris County Bar Association (Estate and Trusts Committee); New Jersey State Bar Foundation (Program Development Committee)
Publications Include: NEW JERSEY ELDER LAW PRACTICE (3rd Ed.)(ICLE (contributing author); NEW JERSEY PRACTICE ELDER LAW: GUARDIANSHIP AND CONSERVATORSHIP (vol. 45)(West Group)(contributing author)