



# 2017 Basics of Elder & Special Needs Law

### LIVE • LIVE WEBCAST

Friday, October 27, 2017  
NC Bar Center, Cary

### CLE CREDIT: 7.0 Hours

Includes 1.0 Hour Substance Abuse/  
Mental Health  
Qualifies for North Carolina State Bar  
Elder Law Specialization credit

### VIDEO REPLAYS (at printing)

Asheville, Wed., November 29, 2017  
Cary, Tue., March 6, 2018  
Charlotte, Fri., February 23, 2018  
Fayetteville, Wed., January 10, 2018  
Hickory, Wed., January 10, 2018  
Pinehurst, Wed., November 29, 2017  
Winston-Salem, Tue., February 22, 2018

### UPDATES & REGISTRATION

[www.tinyurl.com/CLE625BEL](http://www.tinyurl.com/CLE625BEL)



Planned by the NCBA Elder &  
Special Needs Law Section

**SUMMARY:** The 2017 Basics program builds a stronger foundation for any elder law attorney, including experienced practitioners and attorneys who are new to the practice of elder law. This year's program offers practical guidance for guardianship proceedings and elder law litigation. In addition, attendees gain better understanding of strategies for long term care planning and Medicaid applications. Attendees also obtain the following benefits:

- Receive guidance about ABLE accounts and special needs trust planning
- Obtain information about public benefits eligibility and trust taxation
- Hear about how to achieve mental, physical and professional health
- Learn about common strategies in avoiding estate recovery

The North Carolina Bar Association is accredited by the North Carolina State Bar as a provider of continuing legal education.

**NORTH CAROLINA  
BAR ASSOCIATION**

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# 2017 Basics of Elder & Special Needs Law

#625BEL and #625LWC | October 27, 2017

## FOUR WAYS TO REGISTER

ONLINE\* [www.ncbar.org/CLE](http://www.ncbar.org/CLE) • PHONE\* 800.228.3402 • FAX\* 919.677.1774  
 MAIL\*\* Attn: Accounting—NCBA, P.O. Box 3688, Cary, NC 27519-3688

\*Credit cards only. \*\*Please make checks payable to NCBA.

**TUITION | LIVE • WEBCAST • VIDEO REPLAY (VR) |** Select format and tuition rate below.

REGISTRANT TYPE	EARLY BIRD TUITION <small>Received one week prior to program date.</small>	REGULAR TUITION <small>Received less than one week prior to program date.</small>	WEBCAST TUITION
NCBA Elder & Special Needs Law Section Member	<b>\$240</b> <input type="checkbox"/> Live <input type="checkbox"/> VR (see below)	<b>\$295</b> <input type="checkbox"/> Live <input type="checkbox"/> VR (see below)	<b>\$320</b> <input type="checkbox"/> Webcast
NCBA Member	<b>\$260</b> <input type="checkbox"/> Live <input type="checkbox"/> VR (see below)	<b>\$315</b> <input type="checkbox"/> Live <input type="checkbox"/> VR (see below)	<b>\$340</b> <input type="checkbox"/> Webcast
NCBA Paralegal Division Member	<b>\$170</b> <input type="checkbox"/> Live <input type="checkbox"/> VR (see below)	<b>\$225</b> <input type="checkbox"/> Live <input type="checkbox"/> VR (see below)	<b>\$250</b> <input type="checkbox"/> Webcast
Non-member	<b>\$315</b> <input type="checkbox"/> Live <input type="checkbox"/> VR (see below)	<b>\$370</b> <input type="checkbox"/> Live <input type="checkbox"/> VR (see below)	<b>\$395</b> <input type="checkbox"/> Webcast
Full-time LANC Attorney (NCBA Member)	These categories do not qualify for Early Bird tuition.	<b>\$170</b> <input type="checkbox"/> Live <input type="checkbox"/> VR (see below)	<b>\$195</b> <input type="checkbox"/> Webcast
1st Year Licensed in NC (NCBA Member)		<b>\$99</b> <input type="checkbox"/> Live <input type="checkbox"/> VR (see below)	<b>\$124</b> <input type="checkbox"/> Webcast
CLE Passport Holder		<b>7 tokens</b> <input type="checkbox"/> Live <input type="checkbox"/> VR (see below)	<b>7 tokens</b> <input type="checkbox"/> Webcast
<input type="checkbox"/> Judge (NCBA Member) <input type="checkbox"/> Clerk of Court (NCBA Member) <input type="checkbox"/> Law Professor (NCBA Member)	These categories do not qualify for Early Bird tuition or include any MCLE fees.	<b>\$75</b> <input type="checkbox"/> Live <input type="checkbox"/> VR (see below)	Choose from the applicable Webcast tuition options above.
<input type="checkbox"/> Law Student Division Member <input type="checkbox"/> Paralegal Division Student Member		<b>\$25</b> <input type="checkbox"/> Live <input type="checkbox"/> VR (see below)	

**VIDEO REPLAY LOCATIONS |** For details and updates, see [www.tinyurl.com/CLE625BEL](http://www.tinyurl.com/CLE625BEL).

- Asheville | #625ASV | Nov. 29, 2017
  - Cary | #625BAR | Mar. 6, 2018
  - Charlotte | #625CHA | Feb. 23, 2018
  - Fayetteville | #625FAY | Jan. 10, 2018
  - Hickory | #625HIC | Jan. 10, 2018
  - Pinehurst | #625PIN | Nov. 29, 2018
  - Winston-Salem | #625WIN | Feb. 22, 2018
- Other (if applicable, from website): **City:** \_\_\_\_\_ | **Code:** #625 \_\_\_\_\_

## REGISTRANT INFORMATION | Please print clearly.

625BEL-B

Print Full Name: \_\_\_\_\_  
 Firm/Organization Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City, State and ZIP: \_\_\_\_\_  
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## PAYMENT | Registration is processed only after payment is received. Please print clearly.

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 Card Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_  
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**Friday, October 27, 2017, 7:45a–4:45p**

7:45a **Registration**

8:15 **Welcome and Introductions**

8:20 **Introduction to Special Needs Planning**

**Brent W. Stephens**

Overview of ABLÉ accounts, considerations involved in planning for special needs or supplemental needs individuals, and tips for drafting special and supplemental needs trusts.

9:20 **Introduction to Guardianship**

**Lisa M. Salines-Mondello**

Provides a substantive and procedural overview of guardianship proceedings and tactical strategies for success in defending against or petitioning for guardianship.

10:20 **Break**

10:35 **Overview of Elder Law Litigation**

**Rachel A. Fuerst**

Offers guidance on litigating claims by nursing home and assisted living residents, residents of continuing care retirement committees, and claims against home care agencies and other related elder law litigation.

11:35 **Networking Lunch** (included at Live program only)

12:30p **Introduction to Medicaid Eligibility and Applications**

**Andrew D. Atherton**

Provides an introduction to Medicaid eligibility, addressing Medicaid gift penalties, successful planning strategies and tips on filing applications.

1:30 **Medicaid Strategies in Long Term Care Planning**

**Andrew W. Olsen**

Addresses considerations and strategies for long-term care planning and avoiding Medicaid estate recovery.

2:30 **Break**

2:45 **Attorney Wellness: Achieving Health Physically, Mentally and Professionally<sup>†</sup>**

**Sarah E. Nagae**

Detailed discussions on attorney vulnerability to dependency and health conditions, identifying and correcting health behaviors that contribute to less than optimal job performance, and in developing achievable short-term and long-term wellness goals.

3:45 **Public Benefits and Trust Taxation**

**Robert A. “Bob” Mason**

Offers discussion on how to identify and minimize tax consequences when engaging in Public Benefits Eligibility and Asset Preservation Trust Planning.

4:45 **Adjourn**

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## CLE Passport Pricing

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24 Hours (Tokens) for \$649

*Non-member pricing is also available.*

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You now enjoy first-class picture and sound in the NCBA auditorium, plus updated conference room technology for your CLEs and meetings.

**FINE PRINT • REGISTRATION** Registrations are limited by space, and may include a live video broadcast overflow room. **TRANSFERS** Registrants may transfer from a Live program, Video Replay, Webcast, Webinar or Phone/Audio Streaming Program without penalty within three business days after the program date. **CANCELLATIONS** Cancellations must be received by 9:00 a.m. the third business day prior to the program to qualify for a refund (less \$75 administrative fee). Those not attending will receive the digital program materials in full consideration of tuition paid. **MCLE CREDIT** The North Carolina Bar Association is an accredited CLE sponsor under the MCLE Regulations promulgated by the North Carolina State Bar Board of Continuing Legal Education. This program is approved (but not sponsored) by the Board for the designated number of CLE hours. Each attorney must maintain a record of his/her attendance for the NC State Bar annual report. MCLE credit is reported by NCBA only if a NC State Bar number is provided. Your CLE tuition includes mandatory State Bar fees used to support the State Bar's Mandatory Continuing Legal Education program, the Chief Justice's Commission on Professionalism and the Chief Justice's Equal Access to Justice Commission. Your tuition also includes digital access to all program materials. **DIGITAL PROGRAM MATERIALS** You will receive a notification email when digital materials are available to download. To retrieve digital materials, log in and select "Your Course Materials" on the CLE website. All of the materials for this program will be available for download in advance of the program. **VIDEO REPLAYS** To qualify for the Early Bird tuition, registration must be received one week prior to program date. NC State Bar rules require a minimum number of preregistered active State Bar members. NCBA reserves the right to cancel any video program prior to the program date if registrations do not meet the NC State Bar requirement. Some sites require additional registration or evaluation forms. Visit [www.tinyurl.com/CLE625BEL](http://www.tinyurl.com/CLE625BEL) to confirm video replay registration and program start times. CLE credit hours at Video Replays are subject to change. Video replay program attendees may purchase the printed manuscript at cost. Due to printing and shipping lead times we are unable to accommodate requests for print materials made fewer than seven (7) days prior to any video replay program. **PERSONS WITH DISABILITIES** We make every effort to ensure that our programs are held in facilities which are fully accessible to persons with disabilities. If you plan to attend our program and need special facilities or assistance relating to a disability, please contact the CLE Department at least one week prior to the date of the program. **INCLEMENT WEATHER** We make every effort to notify registrants when a program is canceled or delayed due to weather. If inclement weather is forecast, please check your local news listings or contact event venue. NCBA programs will follow the work schedule of the hosting institutions, to include delayed openings. **CLE SCHOLARSHIPS** A limited number of scholarships are available to members in financial need. Contact Membership Services at 1.800.662.7407 or email [akemple@ncbar.org](mailto:akemple@ncbar.org). **EVENT SPONSOR AND EXHIBITOR OPPORTUNITIES** Interested in meeting the attendees of this program? Become an exhibitor or sponsor! Contact Jennifer Shapiro at [CLESponsorship@ncbar.org](mailto:CLESponsorship@ncbar.org) for detailed information about these opportunities and their benefits. **FOR MORE INFORMATION, VISIT [WWW.NCBAR.ORG/CLE](http://WWW.NCBAR.ORG/CLE).**



## Planners

- Nicole L. “Nicki” Applefield, Patla Straus Robinson & Moore PA, Asheville
- Kara O. Gansmann, Cranfill Sumner & Hartzog LLP, Wilmington

## Speakers

- Andrew D. Atherton, McGuire Wood & Bisette PA, Asheville
- Rachel A. Fuerst, Henson Fuerst PA, Raleigh
- Robert A. “Bob” Mason, Mason Law PC, Asheboro
- Sarah E. Nagae, Nexsen Pruet PLLC, Raleigh
- Andrew W. Olsen, Cranfill Sumner & Hartzog LLP, Wilmington
- Lisa M. Salines-Mondello, Salines-Mondello Law Firm PC, Wilmington
- Brent W. Stephens, Craige Jenkins Liipfert & Walker LLP, Winston-Salem

We extend our sincere gratitude to the NCBA Elder & Special Needs Law Section and the planners and speakers who volunteer their time and expertise toward the goal of presenting an educational program of the very highest quality.

## Hotel Information

Contact hotels directly for reservations at the special NCBA room rate. Rates are based on availability and may sell out.

- **Embassy Suites, 201 Harrison Oaks Boulevard, Cary**  
**Nightly Rate:** \$169 single/double and includes evening manager’s reception and full, cooked-to-order breakfast  
**Reservations:** [www.tinyurl.com/NCBA-Embassy](http://www.tinyurl.com/NCBA-Embassy)  
**NCBA Corporate Account Special Rate Code:** 2691626  
**Please note:** The rates may vary according to guest room availability.
- **TownePlace Suites by Marriott, 120 Sage Commons Way, Cary**  
**Nightly Rate:** \$114 studio queen with sleeper sofa (Sunday–Thursday) and includes complimentary hot breakfast. All rooms have a fully equipped kitchen.  
**Reservations:** 919.678.0005 | **Ask for the NC Bar Association corporate rate.**

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“The Medicaid presentation was great.”

“This gave me an overview of the areas of law encompassed by elder law.”

“The materials for this program were fantastic.”

—Attendees, 2016 Basics of Elder & Special Needs Law