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

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## REGISTRANT INFORMATION | Please print clearly.

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Program Agenda

Friday, October 27, 2017, 7:45 a–4:45 p

7:45 a  
Registration

8:15  
Welcome and Introductions

8:20  
Introduction to Special Needs Planning
Brent W. Stephens
Overview of ABLE accounts, considerations involved in planning for special needs or supplemental needs individuals, and tips for drafting special and supplemental needs trusts.

8:25  
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.

9:20  
Break

10:20  
Introduction to 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.

10:35  
Networking Lunch (included at Live program only)

12:30 p  
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†
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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Program Information

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 & Bissette PA, Asheville
- Rachel A. Fuerst, Henson Fuerst PA, Raleigh
- Robert A. “Bob” Mason, Mason Law PC, Asheboro
- Sarah E. Nagae, Nexsen Pruet PLLC, Raleigh
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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

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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