Program Information

Planners

- **Nicole L. "Nicki" Applefield**, Patla Straus Robinson & Moore PA, Asheville
- **Kara O. Gansmann**, Cranfill Sumner & Hartzog LLP, Wilmington
- **David W. Silver**, The Graham Nuckolls Conner Law Firm PLLC, Greenville

Speakers

- **David Godfrey**, American Bar Association Commission on Law and Aging, Washington, DC
- **A. Frank Johns**, Booth Harrington & Johns of North Carolina PLLC, Greensboro
- **Hugh M. Lee**, Brody School of Medicine, East Carolina University, Greenville
- **B. Bailey Liipfert III**, Liipfert Law Group PLLC, Winston-Salem
- **Robert A. "Bob" Mason**, Mason Law, Asheboro
- **Nancy A. Mayer**, Nancy A. Mayer, Attorney at Law PLLC, Durham
- **Letha Sgritta McDowell**, Hook Law Center, Virginia Beach, VA
- **Valerie L. Peterson**, ElderCounsel LLC, Orange County, CA
- **Larry H. Rocamora**, McPherson Rocamora Nicholson & Wilson PLLC, Durham
- **Kathleen Rose Rodberg**, McGuire Wood & Bissette PA, Asheville
- **Aimee Smith**, Craige Jenkins Liipfert & Walker LLP, Winston-Salem
- **William C. "Bill" Trosch**, Conrad Trosch & Kemmy PA, Charlotte

Hotel Information

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

Pinehurst Resort
80 Carolina Vista Drive, Pinehurst, NC 28374

Rate: Modified American Plan (MAP):
MAP rate is per person, per night and includes lodging, breakfast and dinner.
$232 single occupancy or $159 double occupancy
Reservations: ***www.tinyurl.com/PinehurstResort*** or 855.235.8507
Cut-off Date: January 29, 2018
Rate Code: NC Bar Association

Elder & Special Needs Law

22nd Annual Elder & Special Needs Law Symposium

LIVE
Thursday–Friday, February 22-23, 2018
Pinehurst Resort, Pinehurst

CLE CREDIT: 11.0 Hours
Includes 1.5 Hours Ethics/Professional Responsibility credit

VIDEO REPLAYS, UPDATES & REGISTRATION
www.tinyurl.com/CLE697ELS

"I enjoyed the variety in topics. The speakers were knowledgeable. The attendees were friendly. I'm amazed that busy attorneys can pull off something like this so beautifully."

"The materials are great and we can read them on our own time. Organization was superb."

"It was a great opportunity for networking and, as a first time attendee, I learned a lot regarding the current state of things in Elder Law."

-Attendees, *21st Annual Elder & Special Needs Law Symposium*

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Planned by the NCBA Elder & Special Needs Law Section

SUMMARY: The *22nd Annual Elder & Special Needs Law Symposium* offers insight from respected elder law and special needs law practitioners from North Carolina and across the country. This year's program provides an in-depth review of the latest strategies for Medicaid and special needs planning, a discussion on the major ethical issues to be aware of when representing clients with disabilities, and insight for attorneys practicing fiduciary litigation. Attendees can expect to:

- Receive information on federal employees' retirement, pension and healthcare benefits
- Learn special needs trust planning strategies for dealing with retirement benefits
- Explore public housing benefits and other sources of public assistance
- Learn about supported decision making for clients with dementia

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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22nd Annual Elder & Special Needs Law Symposium

#697ELS | Thursday–Friday, February 22–23, 2018

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TUITION | LIVE • VIDEO REPLAY (VR) | Select format and tuiton rate below.

REGISTRANT TYPE	EARLY BIRD TUITION Received one week prior to program date.	REGULAR TUITION Received less than one week prior to program date.
NCBA Elder & Special Needs Law Section Member	$450 ☐ Live ☐ VR (see below)	$525 ☐ Live ☐ VR (see below)
NCBA Member	$470 ☐ Live ☐ VR (see below)	$545 ☐ Live ☐ VR (see below)
NCBA Paralegal Division Member	$295 ☐ Live ☐ VR (see below)	$370 ☐ Live ☐ VR (see below)
Non-member	$545 ☐ Live ☐ VR (see below)	$620 ☐ Live ☐ VR (see below)
Full-time LANC Attorney (NCBA Member)	These categories do not qualify for Early Bird tuition.	$295 ☐ Live ☐ VR (see below)
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☐ Judge (NCBA Member) ☐ Clerk of Court (NCBA Member) ☐ Law Professor (NCBA Member)	These categories do not qualify for Early Bird tuition or include any MCLE fees.	$75 ☐ Live ☐ VR (see below)
☐ Law Student Division Member ☐ Paralegal Division Student Member		$25 ☐ Live ☐ VR (see below)

VIDEO REPLAY LOCATIONS | To register for a Video Replay, visit this program's webpage at *www.tinyurl.com/CLE697ELS* to view all locations and dates, then enter your selection below.

City:____________________ | Date: ____________________ | Code: #697 ______

REGISTRANT INFORMATION | Please print clearly.

697ELS-B

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Program Agenda

Thursday, February 22, 2018, 11:45a–5:30p

11:45a **Registration and Boxed Lunch** (included at Live program only)

12:20p **Welcome and Introductions**

12:30 **Medicaid and VA Pension Benefits Planning**
Valerie L. Peterson
Learn about the latest Medicaid, VA benefits and special needs planning strategies for crisis cases and clients looking to plan proactively. Hear the latest news about the proposed changes to the VA pension eligibility regulations.

2:00 **Supported Decision-Making and Dementia Clients**
David Godfrey
The fundamental right of self-determination is priceless, and guardianship should always be a last resort. Supported decision-making (SDM) is a paradigm of person-centered planning that can be used to avoid a guardianship and promote autonomy. Learn about SDM and assessing capacity in clients with dementia.

3:00 **Recent Developments**
Letha Sgritta McDowell and **Kathleen Rose Rodberg**

4:30 **Blended Families and Divorce in Elder Law**
Letha Sgritta McDowell
As "gray divorces" and blended families are becoming more common among the aging population, this presentation focuses on key aspects to consider when planning for elder clients with these circumstances.

5:30 **Reception**
Sponsored by Resource Preservation Solutions

Friday, February 23, 2018, 8:15a–5:00p

8:15a **Continental Breakfast** (included at Live program only)

8:40 **Announcements and Introductions**

8:45 **Leaving Retirement Benefits to People with Special Needs**
Larry H. Rocamora
Planning for retirement benefits for persons with disabilities can be challenging. Learn about the various options for leaving retirement benefits to persons with special needs, including how to draft an effective accumulation provision in a special needs trust.

9:45 **Navigating Housing and Public Benefits**
B. Bailey Liipfert III and **Aimee Smith**
Help clients with special needs or disabilities navigate the benefits available to them by learning more about public benefits programs, personal care services and the unique housing issues these clients face.

10:45 **Break**

11:00 **Planning Strategies for Clients with Federal Employee Benefits**
Nancy A. Mayer
Federal employees and annuitants have many benefits that are unique to this workforce. This presentation describes these benefit programs, the applicability of different programs and choices available to Federal employees and annuitants. This allows attendees to better understand Federal employees and annuitants.

12:00p **Elder & Special Needs Law Section Annual Meeting**
Casey N. Ferri, Conrad Trosch & Kemmy PA, Charlotte, 2017-2018 Section Chair, presiding

12:15 **Networking Lunch** (included at Live program only)

1:45 **Breakout Sessions** (choose one)

- **Fiduciary Litigation Strategies**
  William C. "Bill" Trosch
  Fiduciary litigation requires sound trial strategies and a well-executed trial plan. Know the claims, tactics, and procedures required of fiduciary litigation to succeed. This presentation also includes drafting tips to avoid traps, pitfalls and fiduciary litigation.
- **Advising Clients About Long-Term Care Insurance**
  Hugh M. Lee
  A presentation to prepare attorneys to discuss and advise clients about trends in long-term care insurance. Topics include market trends, current costs, types of products offered, opportunity costs and methods for helping clients decide if long-term care insurance is appropriate for them.

3:15 **Break**

3:30 **Ethics Panel for Fiduciary Representation***
A. Frank Johns and **Robert A. "Bob" Mason**
Client identification, client capacity and conflicts of interest are just some of the ethical issues faced by elder law and special needs law attorneys. Review strategies for ethically representing clients with disabilities with experts in the elder and special needs law field.

5:00 **Adjourn**

* Indicates portion providing Ethics/Professional Responsibility credit

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