The 22nd Annual Elder & Special Needs Law Symposium

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

CLE CREDIT: 11.0 Hours
Includes 15 Hours Ethics/Professional Responsibility credit
Qualifies for North Carolina State Bar Elder Law Specialization credit

VIDEO REPLAYS, UPDATES & REGISTRATION
www.tinyurl.com/CL697ELS

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
• Discuss Medicaid and special needs planning, a discussion on the major ethical issues to be aware of when representing clients with disabilities
• Explore public housing benefits
• Assess the latest strategies for Medicaid and special needs planning

The North Carolina Bar Association is accredited by the North Carolina State Bar as a provider of continuing legal education.
<table>
<thead>
<tr>
<th>Program Agenda</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Thursday, February 22, 2018, 11:45a–5:30p</strong></td>
</tr>
<tr>
<td><strong>11:45a</strong> Registration and Boxed Lunch (included at Live program only)</td>
</tr>
<tr>
<td><strong>12:20p</strong> Welcome and Introductions</td>
</tr>
</tbody>
</table>
| **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  
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  
Harry L. 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 Lilipert 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.

---

**22nd Annual Elder & Special Needs Law Symposium**

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

**FOUR WAYS TO REGISTER**

**ONLINE**: [www.ncbar.org/CLE](http://www.ncbar.org/CLE)  
**PHONE**: 800.228.3402  
**FAX**: 919.677.1774

**MAIL**: NCBA Accounting, P.O. Box 3688, Cary, NC 27519-3688

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

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

<table>
<thead>
<tr>
<th>REGISTRANT TYPE</th>
<th>EARLY BIRD TUITION</th>
<th>REGULAR TUITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>NCBA Elder &amp; Special Needs Law Section Member</td>
<td>$450</td>
<td>$545</td>
</tr>
<tr>
<td>NCBA Member</td>
<td>$470</td>
<td>$545</td>
</tr>
<tr>
<td>NCBA Paralegal Division Member</td>
<td>$395</td>
<td>$370</td>
</tr>
<tr>
<td>Non-member</td>
<td>$545</td>
<td>$620</td>
</tr>
<tr>
<td>Full-time LANC Attorney (NCBA Member)</td>
<td>$195</td>
<td>$195</td>
</tr>
<tr>
<td>1st Year Licensed in NC (NCBA Member)</td>
<td>$195</td>
<td>$195</td>
</tr>
<tr>
<td>CLE Passport Holder</td>
<td>$195</td>
<td>$195</td>
</tr>
</tbody>
</table>

**REGISTRANT INFORMATION**  
Please print clearly.

**PAYMENT**  
Registration is processed only after payment is received. Please print clearly.

| Enclosed is a check, payable to NCBA  
Card Number | Please charge my credit card |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Expiration Date</td>
<td>Signature</td>
</tr>
</tbody>
</table>

---

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

**REGISTRANT TYPE | VIDEO REPLAY LOCATION**

| NCBA Elder & Special Needs Law Section Member | *Avail. all week prior to program date.* |
| NCBA Member | *Avail. all week prior to program date.* |
| NCBA Paralegal Division Member | *Avail. all week prior to program date.* |
| Non-member | *Avail. all week prior to program date.* |
| Full-time LANC Attorney (NCBA Member) | *Avail. all week prior to program date.* |
| 1st Year Licensed in NC (NCBA Member) | *Avail. all week prior to program date.* |
| CLE Passport Holder | *Avail. all week prior to program date.* |

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

City:____________________  
Date:____________________  
Code: #697ELS

**PAYMENT**  
Registration is processed only after payment is received. Please print clearly.

| Enclosed is a check, payable to NCBA  
Card Number | Please charge my credit card |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Expiration Date</td>
<td>Signature</td>
</tr>
</tbody>
</table>

---

**THURSDAY BIRD TUITION**

<table>
<thead>
<tr>
<th>REGISTRANT TYPE</th>
<th>THRU 1ST WEEK</th>
<th>(Included at Live program only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>NCBA Elder &amp; Special Needs Law Section Member</td>
<td>$470</td>
<td>$545</td>
</tr>
<tr>
<td>NCBA Member</td>
<td>$470</td>
<td>$545</td>
</tr>
<tr>
<td>NCBA Paralegal Division Member</td>
<td>$395</td>
<td>$370</td>
</tr>
<tr>
<td>Non-member</td>
<td>$545</td>
<td>$620</td>
</tr>
<tr>
<td>Full-time LANC Attorney (NCBA Member)</td>
<td>$195</td>
<td>$195</td>
</tr>
<tr>
<td>1st Year Licensed in NC (NCBA Member)</td>
<td>$195</td>
<td>$195</td>
</tr>
<tr>
<td>CLE Passport Holder</td>
<td>$195</td>
<td>$195</td>
</tr>
</tbody>
</table>

---

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

**9:45** Navigating Housing and Public Benefits  
B. Bailey Lilipert 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.

---

**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)

**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 and strategies for ethically representing clients with disabilities with experts in the elder and special needs law field.

---

**Adjourn**

*Indicates portion providing Ethics/Professional Responsibility credit