

NORTH CAROLINA
BAR ASSOCIATION
seeking liberty + justice

2018 Basics of Elder & Special Needs Law



7.5
HOURS

TOTAL CLE CREDIT

1.0
HOUR

**Substance Abuse/
Mental Health**



**Qualifies for NC
State Bar Elder Law
Specialization credit**

LIVE and WEBCAST

Friday, October 12, 2018
North Carolina Bar Center
8000 Weston Parkway
Cary

REGISTER TODAY!

Save 10% if registration is
received by September 21, 2018.
www.tinyurl.com/CLE719BEL

AVAILABLE FORMATS



PROGRAM SUMMARY

The *2018 Basics of Elder & Special Needs Law* program features a range of relevant topics that appeal to both seasoned practitioners and attorneys who are new to the practice. It offers practical guidance for drafting health care planning documents, discussing end-of-life health decisions, HIPAA issues and palliative care with clients.

Attendees also obtain the following benefits:

- An understanding of when and how supplemental needs trusts, ABLE accounts and pooled trusts benefit individuals with disabilities
- A greater knowledge of the North Carolina Uniform Power of Attorney Act and its impact on elder law planning
- Information on eligibility for Medicaid and planning techniques

WHAT PEOPLE ARE SAYING...



Good program. Knowledgeable speakers.
Timely subject matter since our population is aging.



Well-organized and covered useful topics.



Great mix of topics in a single CLE event.

– Attendees, *2017 Basics of Elder & Special Needs Law*

REGISTER TODAY!

Online: www.tinyurl.com/CLE719BEL | **By phone:** 800.228.3402

By mail: Attn: Accounting-NCBA, 8000 Weston Parkway, Cary, NC 27513

STEP 1: Tell us who you are. (Please print clearly.)

Print Full Name: _____

Address: _____

City, State and ZIP: _____

Daytime Phone Number: _____

Email Address: _____

NC State Bar No. (Required for MCLE Credit): _____

STEP 2: Select your tuition rate. (Register early and save 10%. Payment must be received three (3) weeks prior to program date to qualify for the early rate.)

Standard Rate: \$410 / \$370 *Early*

NCBA Member: \$340 / \$305 *Early*

Elder & Special Needs Law

Section Member: \$315 / \$285 *Early*

CLE Premier Pass: \$0

STEP 3: Select your learning format.

Live (719BEL) Webcast (719LWC) Video Replay (See below.)

Video Replay registration (if selected).

Video Replays are scheduled for this program. The agenda may not include certain breakouts/tracks shown at the original program. For a list of dates and locations visit www.tinyurl.com/CLE719BEL, and indicate your choice below.

Location: _____ Date: _____ Code: _____

STEP 4: Complete your payment information.

(Registration is complete only after payment is processed. Please print clearly.)

I am registering for this program at the tuition rate checked above.

Enclosed is a check, payable to NCBA. Please charge my credit card.

Card Number: _____ Exp. Date: _____

Total Amount: _____ Signature: _____

Discounts are available for NCBA members who are students, law professors, judges or legal services/public interest attorneys. Call CLE at 800.228.3402 for details.

AGENDA

FRIDAY, OCTOBER 12, 2018 | 7:45 a.m. – 5:00 p.m.

- 7:45 Registration and Continental Breakfast** implications these documents have on a patient's health care.
- 8:15 Welcome and Introductions**
- 8:20 The Impact of the NC Uniform Power of Attorney Act on Elder Law** | Salines-Mondello
A review of the North Carolina Uniform Power of Attorney Act, focusing on the specific provisions of the Act that impact elder law issues and the planning needs of elder law clients.
- 9:20 Introduction to ABLÉ Accounts and the NC ABLÉ Program** | Chisholm
Learn how individuals with disabilities can save money on a tax-advantaged basis while preserving SSDI, SSI and Medicaid benefits. Topics include the benefits and uses of an ABLÉ account, eligibility for—and enrolling in—an ABLÉ account, restrictions on contributions and distributions, structure and features of the NC ABLÉ program, and rollovers and beneficiaries.
- 10:20 Break**
- 10:30 End-of-Life Health Documents, Decisions and Discussions** | Drickamer
Receive an overview of end-of-life and palliative care health documents such as health care powers of attorney, advanced directives, DNR forms and MOST forms with a focus on HIPAA issues and how these documents impact end-of-life care. Learn which end-of-life considerations to discuss with clients when executing these documents and obtain a better understanding of the medical
- 11:30 Networking Lunch**
- 12:15 Introduction to Medicaid Eligibility and Planning** | Smith
Receive a broad overview of Medicaid benefits, eligibility and planning techniques. Hear considerations and strategies for long-term care planning.
- 1:45 Comparison of Supplemental Needs Trusts, Pooled Trusts and ABLÉ Accounts** | Marcus
Explore the financial management options available to individuals with disabilities through supplemental needs trusts, pooled trusts and ABLÉ accounts. Learn how each of these accounts differ, when to use each type, and how they can be used individually and together to preserve an individual's Medicaid and SSI eligibility.
- 2:45 Break**
- 3:00 Ten Things Estate Litigators Want Estate Planners to Know** | Fuerst
Learn, from a litigator's perspective, how certain estate planning strategies can adversely create or beneficially avoid the potential for estate-related litigation.
- 4:00 The Price We Pay as Professional Problem Solvers[†]** | Borsman
Gain insight on problem solving for transitions in a law practice.
- 5:00 Adjourn**
- [†] Indicates portion providing Substance Abuse/Mental Health credit

PROGRAM DETAILS

SPEAKERS

- **Lanéé Borsman**, Hutchens Law Firm, Fayetteville
- **Reid Chisholm**, Assistant General Counsel, North Carolina Department of State Treasurer, Raleigh
- **Margaret A. Drickamer, M.D.**, UNC Center for Aging and Health and Division of Geriatric Medicine, Chapel Hill
- **Rachel A. Fuerst**, Henson Fuerst PA, Raleigh
- **Joanne Marcus**, MSW, Commonwealth Community Trust, Richmond, VA
- **Lisa M. Salines-Mondello**, Salines-Mondello Law Firm PC, Wilmington
- **Aimee Smith**, Craige Jenkins Liipfert & Walker LLP, Winston-Salem

SPECIAL ACCOMMODATIONS

NCBA makes every effort to ensure a quality learning experience. If you have dietary restrictions or need special accommodations, please contact us at least one (1) week prior to the program start date.

CLE SCHOLARSHIPS

CLE scholarships are available. Contact Membership Services at 800.662.7407 or email Amy Kemple at akemple@ncbar.org for more information.

HOTEL INFORMATION

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

Embassy Suites

201 Harrison Oaks Boulevard, Cary

- **Nightly Rate:** \$169 single/double
- **Reservations:** 919.677.1840 or www.tinyurl.com/NCBA-Embassy
- **Corporate Account Code:** 2691626

TownePlace Suites by Marriott

120 Sage Commons Way, Cary

- **Nightly Rate:** \$114 studio queen with sleeper sofa (Sunday–Thursday)
- **Reservations:** 919.678.0005
- **Ask for the NCBA corporate rate.**

PLANNERS

- **Nicole L. “Nicki” Applefield**, Patla Straus Robinson & Moore PA, Asheville
- **Kara O. Gansmann**, Cranfill Sumner & Hartzog LLP, Wilmington
- **Nancy A. Mayer**, Nancy Mayer, Attorney at Law, PLLC, Durham

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 highest quality.



8000 Weston Parkway
Cary, NC 27513

Nonprofit Org.
US Postage
PAID
Raleigh, NC
Permit #297

2018 Basics of Elder & Special Needs Law

NCBA is an accredited CLE sponsor under the MCLE regulations promulgated by the North Carolina State Bar Board of Continuing Legal Education.

INTRODUCING...

premier pass

The 2018-2019 CLE Premier Pass is an exclusive NCBA member benefit **providing unlimited CLE** including access to hundreds of On Demand programs.

www.tinyurl.com/PremierPass

REGISTRATION: All registrations are processed after payment is received. To qualify for the early tuition rate, payment must be received prior to the deadline indicated. Stated early discount rate percentage is approximate. Registrations may be capped based on venue size and may include an overflow room with additional seating. **CHANGES TO EXISTING REGISTRATIONS:** Should an attendee need to cancel his or her registration to a Live, Webcast or Video Replay program, the cancellation request must be received by 9:00a ET one (1) week prior to the start of the program to receive a full refund. Any attendee requesting cancellation less than one week prior to the program will receive a refund, less a \$75 administrative fee. An attendee may choose to transfer his or her registration at a program to the Live, Webcast or Video Replay format of the same program only. Transfer requests must be received by 9:00a ET one (1) business day prior to the program start date. An attendee may further choose to substitute his or her registration to a Live or Video Replay program only. Substitution means sending another person to attend the Live or Video Replay program when the original registrant is unable to attend. Substitution requests must be received by 9:00a ET one (1) week prior to the program start date. The substituted person may be assessed a different fee based on their NCBA membership classification. Cancellation, transfer and substitution requests must be provided in writing by email at askcle@ncbar.org or by calling 800.228.3402. If an attendee misses any portion of a program, that portion is not subject to substitution, refund or transfer. Except as provided herein, registrations, including On Demand registrations, cannot be cancelled, substituted or transferred once purchased. **NO-SHOWS:** Anyone who is registered for a program, including CLE Premier Pass holders, but does not check in is considered a no-show. No-shows are not issued a refund, and Premier Pass holders will be assessed a \$75 administrative fee. These registrants will receive the digital materials, available in their online accounts, in full consideration of tuition paid. **MISCELLANEOUS:** The NCBA reserves the right to cancel or reschedule programs at any time. Should the NCBA cancel or reschedule a program, registrants may elect to receive a full refund or attend the newly scheduled program. Notifications regarding program changes will be sent to the email address on file. The NCBA is not responsible for any additional expenses incurred as a result of such cancellation or rescheduling. Each attorney must maintain a record of his or her attendance for the NC State Bar Annual Report. MCLE credit is reported by the NCBA only if a NC State Bar number is provided. Registration and attendance at NCBA CLE programs constitutes an agreement by the registrant with the NCBA for use and distribution of the attendee's image or voice in photographs, videotapes, electronic reproductions and audiotapes of such programs and activities. Unless specified, spouses or guests are not eligible to attend NCBA CLE programs and activities without registering to attend. These terms are subject to change.