2019 Basics of Elder and Special Needs Law

TOTAL CLE CREDIT
7.5 HOURS

Ethics/Professional Responsibility credit
1.0 HOUR

Qualifies for North Carolina State Bar Elder Law Specialization credit

LIVE and WEBCAST
Thursday, October 10, 2019
North Carolina Bar Center
8000 Weston Parkway
Cary

REGISTER TODAY!
Save 10% if registration is received by September 19, 2019.
www.tinyurl.com/CLE875BEL
The 2019 Basics of Elder and Special Needs Law program offers a foundational knowledge base for building an elder and special needs law practice. This year’s program provides practical guidance for planning, qualifying and applying for Medicaid. In addition, attendees gain a better understanding of strategies for planning for children with special needs and also obtain the following benefits:

- Find out how and where to locate relevant statutes, rules and regulations, and resources for public benefits planning.
- Learn about common considerations in obtaining and administering guardianships.
- Gain increased knowledge of Medicare and Social Security benefits.
- Hear from the Department of Social Services how Medicaid applications are processed and determinations are made.

WHAT PEOPLE ARE SAYING...

Excellent program! Outstanding variety of speakers and topics.

I loved the interdisciplinary approach. It's great to get viewpoints of others for perspective.

I’m taking away a more in depth understanding of Medicaid rules, among many other things.

—Attendees, 2018 Basics of Elder and Special Needs Law
THURSDAY, OCTOBER 10, 2019 | 7:45 a.m. – 5:20 p.m.

7:45  Registration and Continental Breakfast

8:15  Welcome and Introductions

8:20  Ethical Issues that Arise in Representation*
Manus
Identify and navigate ethical issues that arise when representing elderly clients or clients with disabilities. This presentation walks through the process of identifying the client, working with fiduciaries and family members of a client, exploring the representation of a person with questionable capacity and other related ethical considerations.

9:20  Planning for Children with Special Needs
Vaughan
This session provides an overview of planning for children with special needs, including the potential benefits that may be available, questions to explore with clients and strategies for planning.

10:20  Break

10:35  Medicare and Social Security Benefits
Coble
Learn about Social Security and Medicare benefits and how to navigate the eligibility rules for both.

11:20  FAQs of Elder Law, Locating Resources and Other Elder Law Questions You May be Too Afraid to Ask
Ferri and Rodberg
This dynamic panel explores many of the frequently-asked questions posed by new elder law practitioners, and discusses how and where to locate certain rules and regulations pertaining to benefits. This informative discussion is not only instructive, but serves as an outlet for submitting questions to the panelists anonymously and getting answers to all the elder law questions you might be afraid to ask.

12:05  Networking Lunch
1:05 Introduction to Medicaid Eligibility and Planning Techniques  
Lawler  
The presenter provides a ground-level foundation to eligibility for Medicaid for individuals and married couples, as well as planning strategies for qualifying for Medicaid. Explore how to handle specific assets and some advanced methods for crisis planning.

2:35 Preparing and Submitting Medicaid Applications  
Smith  
Back by popular demand, this presentation reviews the basic considerations and strategies for preparing a Medicaid application, identifying supporting materials and the timing of an application. The discussion highlights the procedural and substantive methods for applying for Medicaid, submitting the application, advocating for the client and seeing the application through to an eventual approval.

3:35 Break

3:50 A View of the Medicaid Application from the Perspective of a DSS Caseworker  
Herkko  
This discussion, led by a Department of Social Services caseworker, explores the general Medicaid application process from their perspective. Learn how DSS reviews application materials, processes applications and makes determinations on issues that arise with applications. Learn what caseworkers like to see and what may frustrate them about the application process.

4:20 Guardianships: From Start to Finish  
Garlock  
Review the process of adjudicating a person incompetent and appointing a guardian, as well as administering a guardianship from a lawyer’s perspective.

5:20 Adjourn

*Indicates portion providing Ethics/Professional Responsibility credit
PROGRAM DETAILS

SPEAKERS

- Casey N. Ferri, Crisp Cherry McCraw PLLC, Charlotte
- Victor C. Garlock, Garlock & McKinney PC, Black Mountain
- Tami Herko, Wake County Department of Social Services, Raleigh
- Brian T. Lawler, The Van Winkle Law Firm, Asheville
- Roger T. Manus, Campbell University School of Law, Raleigh
- Aimee L. Smith, Craige Jenkins Liipfert & Walker LLP, Winston-Salem
- Hannah B. Vaughan, Vaughan Legal PLLC, Greensboro

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**: $174 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

- Kara O. Gansmann, Cranfill Sumner & Hartzog LLP, Wilmington
- Brian T. Lawler, The Van Winkle Law Firm, Asheville

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.

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 highest quality.
North Carolina Estate Administration Manual, ninth edition

Considered the gold standard for North Carolina estate practitioners, this bestselling procedural guide continues to improve the quality of probate practice through the use of systematic and uniform procedures.

Along with legislative updates, pertinent case law and more than 185 essential forms, this comprehensive ninth edition is enhanced with new and expanded sections on the following key topics:

- Basis consistency reporting (IRS Form 8971) (New)
- Uniform Adult Guardianship and Protective Proceedings Jurisdiction Act (New)
- Standby guardianship (Expanded)
- "Living probate" (Expanded)
- Trust administration (Expanded)
- Comprehensive back-of-the-book index (New)

**Print & E-version**
- Non-Member: $430
- NCBA Member: $365
- Estate Planning & Fiduciary Law Section Member: $330
- CLE Premier Pass: $260

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- Non-Member: $345
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- CLE Premier Pass: $196
Online: www.tinyurl.com/CLE875BEL | 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: ____________________________________________
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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 (875BEL) ☐ Webcast (875LWC) ☐ 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/CLE875BEL and indicate your choice below.

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

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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 canceled, 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.

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