



Missouri  
NAELA

# 2014 MO NAELA Annual Elder Law Symposium

Friday December 5<sup>th</sup> and Saturday December 6<sup>th</sup>  
Holiday Inn Country Club Plaza  
One East 45th Street, Kansas City, MO 64111  
816-753-7400  
Presented by the Missouri NAELA

Sponsored By:



Attorneys  
Friday, December 5<sup>th</sup>

## **Use of Annuities in Medicaid & VA Planning (Dale M. Krause/ DePere, WI)**

As President of Krause Financial Services and a national expert in Medicaid/VA planning Mr. Krause will describe how annuities may be used to plan for Medicaid and VA eligibility for married couples and individuals. This seminar will focus on the practical aspects of calculating the annuity value as well as the advantages of using this strategy in Medicaid and VA planning, including real life examples of hypothetical uses of these products.

## **Promissory Notes, Life Estates, Income Producing Property (Paul M. Gantner/ St. Louis, MO)**

This seminar will cover some of the more unique topics in Medicaid planning. Mr. Gantner will answer some of the most frequently asked questions when you have a family farm, rental property or other income producing property and how the use of promissory notes or life estates may be a planning tool for your clients.

## **Trust as a Beneficiary of an IRA (Bradley J. Frigon, CELA, CAP/ Englewood, CO)**

Mr. Frigon has lectured nationally for NAELA, the ABA, Stetson University Special Needs National Conferences, among others. He will explain how and when to make a trust the beneficiary of an IRA for estate planning as well as for special needs trusts. After this seminar, you will be able to use this planning tool with confidence.

## **You be the Judge, Ethics and Malpractice issues in the Elder Law Practice (Rebecca C. Morgan, CAP, Stetson University School of Law/ Gulfport, FL)**

In this case study structured session, Prof. Morgan will highlight ethical issues through real life scenarios. This interactive session will ask participants to poll their answers. After getting the audience results, Prof. Morgan will walk participants through the court or disciplinary committee's findings for each scenario.

## **Trust Protectors (Craig C. Reaves, CELA, CAP/ Kansas City, MO)**

What is a trust protector? Why does my client's trust need this? Who should be the Trust Protector? Should the attorney be a Trust Protector? These questions and more will be answered when Mr. Reaves discusses everything you ever wanted to know about the role of a Trust Protector in estate and special needs planning.

## **Case Studies for Annuities, Life Estates, etc. (Samantha S. Shepherd, CELA/ Overland, KS)**

During this hands-on problem solving seminar, you will be presented with real life scenarios dealing with the topics presented. You will be given time to work through case studies on your own or in small groups followed by an explanation from experienced Elder Law practitioners.

## **Unprogram**

Back by popular demand! These small group sessions will be facilitated by seasoned elder law attorneys on topics that the attendees desire to discuss to help their clients and their practices. Suggested topics would include Medicaid planning strategies, useful research tools, case flow management and appealing adverse decisions. The sessions will be "hands-on" and help each member of the group do a better job serving clients, regardless of experience.

# 2014 MO NAELA Annual Elder Law Symposium

Paralegals  
Friday, December 5<sup>th</sup>

## **Medicaid Issues (Christine Santamarina/ Kansas City, MO & Amy Fennell/ St. Charles, MO)**

This session discusses completing and submitting a MO HealthNet Application. It will cover the basic issues that arise when completing an application, as well as other issues such as how to report assets discovered after approval and how to get coverage for pre-eligibility medical expenses.

## **Basic Probate Issues (Scott King/ Independence, MO)**

An overview of various probate proceedings, including small estate affidavits, refusal of letters, independent & supervised administration, rights of spouses, creditor claims and compelling administration. Learn how the probate court system works and how you can best support your team when probate issues arise.

## **VA Issues (Marissa Wills/ Overland Park, KS)**

Insights in dealing with VA applications and the approval process. Tips and practices in handling VA planning and applications.

## **Resources for the Paralegal including use of the IMM, POMS and VA (Maureen McHugh/ Overland Park, KS)**

This interactive seminar will teach you how to use free internet resources to solve problems. After a brief explanation of each resource, you will be asked to solve questions using these tools. Please bring a laptop or iPad if possible.

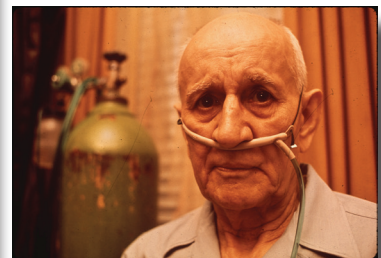
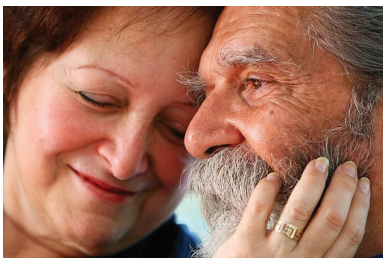
## **Basic Estate Planning**

### **(Melissa Q. Leavy/ St. Louis, MO & Michael C. Weeks , CELA/ St. Charles, MO)**

When to use wills or trusts, non-probate transfers, durable powers of attorney for financial and health care, advance directives, beneficiary deeds and other estate planning tools.

## **Unprogram**

No question is too small for this open- minded session! Discussion can bounce from office management to dealing with difficult clients and everything in-between. Please bring topics you would like to discuss and learn how other paralegals handle the issues you face every day



MO & KS CLE credit pending (10.5 total to include 1.2 in Ethics)

# 2014 MO NAELA Annual Elder Law Symposium

Attorneys Moderated by Martha C. Brown CELA, CAP

FRIDAY	TOPIC	SPEAKER
8:00-8:30	Registration & Breakfast	
8:30-8:45	Welcome	Country Club Trust
8:45-9:45	Trust Protectors	Craig Reaves
9:45-10:00	Break - Visit Exhibitors	
10:00-11:00	Use of Annuities in Medicaid & VA Planning	Dale Krause
11:00-noon	Trust as Beneficiary of an IRA	Brad Frigon
noon-1:00	Lunch Provided	
1:00-2:00	Promissory Notes, Life Estates and Income Producing Property	Paul Gantner
2:00-2:15	Break - Visit Exhibitors	
2:15-3:15	Malpractice & Ethics	Rebecca Morgan
3:15-3:25	Short Break	
3:25-4:25	Case studies for Annuities, Life Estates, Trust Protectors, Ethics, etc.	Samantha Shepherd
4:30-5:30	Networking Reception	Krause Financial

Paralegals

FRIDAY	TOPIC	SPEAKER
8:45-9:45	Medicaid Issues	Christine Santamarina & Amy Fennell
9:45-10:00	Break	
10:00-11:00	Basic Probate Issues	Scott King
11:00-noon	Basic Estate Planning- Wills, Non-Probate Transfers, Trusts, etc.	Mike Weeks & Melissa Leavy
noon-1:00	Lunch	
1:00-2:00	VA	Marissa Wills
2:00-2:15	Break	
2:15-3:15	Resources for the Paralegal- IM, POMS, VA	Maureen McHugh
3:15-3:25	Break	
3:25-4:25	Paralegal Unprogram	TBD

Attorneys & Paralegals

SATURDAY	TOPIC	SPEAKER
8:00-8:30	Breakfast	
8:30-11:30	Unprogram- Topics will be determined by attendees	TBD

Missouri National Academy of Elder Law Attorneys  
2420 Hyde Park Road, Suite A  
Jefferson, MO 65109

Sponsored By:  **Country Club Trust**  
C O M P A N Y



Attorneys	Register Before 11/25	Register After 11/25
MO/KS NAELA Member	\$295.00	\$350.00
Non-Memeber	\$370.00	\$425.00
\$80.00 discount offered on rates for second or additional attorneys from the same firm (e.g. \$215 or \$270, if from the same firm and MO NAELA Members)		
Paralegal/Legal Asst./Secretary	Register Before 11/25	Register After 11/25
MO/KS NAELA Member/Non-Member	\$195.00	\$245.00
Registration only permitted if with attorney from the same firm.		
\$80.00 discount offered on rates for second or additional paralegal/legal asst/secretary from the same firm (e.g. \$115 or \$165, if from the same firm and MO NAELA Members)		

▶ Room Block available until 11/20 at the Holiday Inn, request the group rate of \$109 ◀

Rates for event to include breaks, Networking Reception, Friday Buffet Lunch, Saturday Buffet Breakfast  
To Register for event, fill out the form below and send in with payment.

Make check payable to: MO-NAELA

Mail to: 2420 Hyde Park Road, Suite A, Jefferson City, MO 65109

Name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Amount Enclosed \_\_\_\_\_ For \_\_\_\_\_ # of Paralegal \_\_\_\_\_ # of Attorneys

Paralegal Name(s) \_\_\_\_\_

Paralegal Email \_\_\_\_\_