

**Attorney &
Paralegal
Tracks**



2015 MoNAELA Annual Elder Law Symposium

December 4-5, 2015

Embassy Suites by Hilton

St. Louis Downtown

610 North 7th Street, St. Louis, MO



Presented by
Missouri Chapter of the National
Academy Of Elder Law Attorneys and
Sponsored by
First Bankers Trust Services, Inc.



Individual Event
Sponsors



Conference Schedule

Friday, December 4, 2015

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| 8:00—8:30 AM | Registration and Continental Breakfast |
| 8:30—8:45 AM | Welcome, Opening Remarks - Sponsor, First Bankers Trust Services, Inc. Moderator: Brigid Fernandez, CELA, President MoNAELA |
| 8:45—9:45 AM | Break-out Sessions |
| Attorneys | Case Law Update - In preparation for year 2016, Mr. Reaves will provide an update on 2015 case law and will highlight cases affecting areas of Elder & Special Needs law - Craig Reaves, CELA, CAP, Kansas City, MO |
| Paralegals | Medicaid Planning Strategies - This program will break down a few common Medicaid planning strategies to their most essential components. Mr. Coulson will help participants master the basics of these strategies that many elder law attorneys use daily - Wesley J. Coulson, CELA, St. Louis, MO & O'Fallon, IL |
| 9:45—10:00 AM | BREAK — Visit Exhibitors |
| 10:00—11:00 AM | Break-out Sessions |
| Attorneys | Inter-spousal Transfers: “Transfers between spouses are penalty free (right?)” - In light of the Ohio case, Hughes vs. McCarthy, 734 F.3d 473(6 th Cir. 2013) the commonly used statement ‘All transfers between spouses are penalty-free’ requires further refinement. Given the recent cases, the issue is not simple. This session will discuss the federal statutes concerning inter-spousal transfers and the emerging case law on this issue. - Martha C. Brown, CELA, CAP, St. Louis, MO |
| Paralegals | Medicaid Compliant Annuities - Annuities are a common tool used by attorneys to assist clients in planning for their long term care. Krause Financial Services is a leader in the industry for Medicaid compliant annuity products and information. This session will give participants an overview of these annuities and detailed description for filling out applications for commonly used products through Krause Financial Services - Aaron P. Kempen, Krause Financial Services, De Pere, WI |
| 11:00—Noon | Break-out Sessions |
| Attorneys | Hot Topics in Retirement Benefits – This session will explore three issues that we face for our clients (and ourselves): 1) modifying trusts/beneficiary designations after death to minimize taxation; 2) leaving charitable bequests to charities through retirement plans, and; 3) how to contribute to Roth IRAs for families who earn over the contribution limit. - Mark D. Munson, CELA, Wausau, WI |
| Paralegals | Medicaid Application Preparation & Processing - This session will include discussion focusing on the completion and submission of MO HealthNet applications and working with the new on-line forms, and other issues commonly encountered when preparing and submitting applications and the Declaration and Assessment of Assets form. - Reginald H. Turnbull, CELA, CAP, Jefferson City, MO |
| Noon—1:00 PM | LUNCH — Sponsored by ElderCounsel |
| 1:00—2:00 PM | Break-out Sessions |
| Attorneys | The Ethics of Being a Fiduciary for Clients - This session will focus on the ethics of serving as fiduciary for clients. Should an attorney agree to be a fiduciary for a client? What are the ethical constraints for an attorney to routinely serve as a fiduciary for clients. Is it a good business model? Or, are the ethical rules constraining such a practice? The speaker who serves as a trustee for many special needs trusts will discuss the ethical consideration for such a role. - Ruthann Lacey, CELA, CAP, Tucker, GA |
| Paralegals | How to Proceed Through Probate - This program will take participants step-by-step through the basic probate administration process in Missouri; what to expect and how to effectively manage the process; and the different types of decisions that must be made along the way. Learn about opening the estate, debts of the estate, inventory of assets, the chronology of the administration of the estate, and the basics of guardianship and conservatorship - Brigid Fernandez, CELA, St. Louis, MO |

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| 2:00-2:15 PM | Break — Visit Exhibitors |
| 2:15-3:15 PM | Joint Session |
| ALL | Alzheimer's Disease Research Update - Dr. David B. Carr, Associate Professor of Medicine and Neurology, Clinical Director for the Div of Geriatrics and Nutritional Science, Washington University School of Medicine, Director of The Memory Diagnostic Center and Medical Director at Parc Provence and for the Rehabilitation Institute of St. Louis. |
| 3:15-3:25 PM | Short Break |
| 3:25-4:25 PM | Break-out Sessions |
| Attorneys | VA Issues - Planning for VA Pension and other VA benefits could look very different in the near future under the proposed VA regulations. Mr. Weeks will present a case study analysis of VA planning comparing and contrasting strategies under the current rules vs. proposed regulations - Michael C. Weeks, CELA, St. Charles, MO |
| Paralegals | VA Issues - The VA Pension with Aid & Attendance benefit is a highly sought after benefit, and one that can be very beneficial to your clients who qualify. Ms. Shepherd will walk participants through the eligibility criteria and tips and tricks for filling out an application that gets approved - Samantha L. Shepherd, CELA, Kansas City, MO |
| 4:30-5:30 PM | Networking Reception — Sponsored by Krause Financial Services |

Saturday, December 5, 2015

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| 8:00—8:30 AM | Full Breakfast |
| 8:30-10:00 AM All | Litigating Capacity and Undue Influence Issues - This panel will focus on litigating capacity and undue influence issues in the courtroom. Often elder law attorneys encounter these issues in preparation and execution of documents without much information about how these issues play out in the contested case. The panel will include , Timothy Vujnich , a member of the legal staff of the St. Louis County Probate Court, Judge Carolyn Wittington of the St. Louis County Circuit Court, Martin D. Zehr, Ph.D., J.D. , a Kansas City, MO clinical psychologist who is an attorney and a frequent expert witness on these issues, and Mike Bartolacci , Thompson Coburn, St. Louis, MO, an attorney who litigates many undue influence/capacity issues. Timothy Murphy, Kansas City, Moderator |
| 10:00-10:15 AM | Break |
| 10:15-11:45 AM All | Stump the CELA Chumps - In this open forum panel program, Missouri CELA attorneys will answer questions from participants. Can you stump a CELA? Now is your chance to get the most difficult situations discussed by some of the most experienced Elder Law Attorneys. |

CANCELLATION POLICY

Cancellations 48 hours (or more) prior to the start of an event, a registrant will receive a refund less a \$25 processing fee. Substitutions for paid registrations are accepted. No refunds will be issued after the 48-hour deadline. Material may be sent upon request. No-shows will not receive a refund. No shows requesting refunds due to an emergency or hardship must be received in writing within 30 days after the event date.

Hotel Information: Guest rooms are available at Embassy Suites by Hilton St. Louis Downtown at a special rate of \$115.

The cutoff date is November 13, 2015. Call 1-800-EMBASSY (362-2779) or make your reservations online at <http://embassysuites.hilton.com/en/es/groups/personalized/S/STLWAES-MON-20151203/index.jhtml> .

Special Needs: If you are disabled and require assistance or have special food needs, please submit your requirements to MoNAELA three weeks in advance of this event.

Continuing Education: 10.8 hours including 1.2 Ethics MO Bar CLE, 10.8 hours KS Bar CLE and IL Bar CLE (all pending)



Missouri Chapter of the
National Academy of
Elder Law Attorneys
2420 Hyde Park Rd., Ste. A
Jefferson City, MO 65109



MoNAELA 2015 Elder Law Symposium ~ Registration Form

Company _____ Phone _____
 Address _____ Fax _____
 City _____ State: _____ Zip: _____

| Participant | Before 11/25/15 | After 11/25/15 |
|--------------------|------------------------|-----------------------|
| *MoNAELA Member | \$325 | \$375 |
| *Non-Member | \$400 | \$450 |
| **Paralegal | \$225 | \$275 |

*\$80 discount offered on rates for second or additional attorney from the same firm (\$245, \$295 for members and \$320, \$370 for nonmembers) ****Registration only permitted if with attorney from the same firm. \$80 discount offered on rates for second or additional paralegal from the same firm (\$145, \$195).**

| Participant Information | | | | |
|--------------------------------|--------------|-----------------|------------------|------------|
| Name | Email | Attorney | Paralegal | Fee |
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Total Fees Enclosed \$ _____

**Return Registration Form and Payment to:
 MoNAELA, 2420 Hyde Park Rd., Suite A, Jefferson City, MO 65109**

Financial Hardship Policy—For assistance with the registration fee, contact diana@monaela.org for the application.