

**Continuing Education Requested:  
7.2 CLE Hours Mo Bar and KS Bar**



**18011 Bass Pro Drive  
Independence, MO 64055**

Reservations: 1.800.659.2220  
Hotel Direct: 816.908.9600  
Room Rate: \$104.00  
(King or 2 Queen Beds)  
Group Name: MONAELA  
Deadline: May 16, 2016

MoNAELA  
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**Contact Person: Diana Love**



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

## **Mo Chapter National Academy of Elder Law Attorneys**

Presents...

**2016 Summer  
Program  
"The Basics of  
Elder Law...come  
find the answers"**

**June 17th, 2016**

Stoney Creek Hotel &  
Conference Center  
18011 Bass Pro Drive  
Independence, MO

**Sponsored by:**



## Program Schedule and Topics



**7:30 to 8:15 am ~ Registration &  
Continental Breakfast**

**8:15 to 8:30 am ~ Welcome**

**8:30 to 9:30 am ~ Medicaid Basics for the Single Person: Maureen D. (McHugh) Lester, Kansas City:**

This presentation will take participants step by step through creating a Medicaid plan for a single individual. You will be exposed to tools used by practitioners throughout the state and discuss how very specific facts are interpreted by MO HealthNet. Topics include: Medicaid eligibility rules; the straight spend-down strategy; and the gift and penalty strategy using both a Medicaid-compliant annuity and a promissory note.

**9:30 to 10:30 am ~ Medicaid Basics for the Married Couple: Timothy McCurdy, St. Louis:**

Learn how to preserve resources when the institutionalized spouse requires services while the community spouse does not. Topics include the Snapshot Date; Division of Assets; determining the Spousal Share; applying the Community Spouse Resource Allowance, and; application of the Minimum Monthly Maintenance Needs Allowance.

**10:30 to 10:45 am ~ Break with Exhibitors**

**10:45 to 11:45 am ~ Estate Planning for the Elderly: Erin Merkle, CELA, St. Louis:**

This session will provide an overview of basic estate planning documents included in most estate plans and a discussion on some of the expanded authority that may be included in the documents to deal with long-term care planning issues.

**11:45 am to 12:45 pm ~ Lunch with Exhibitors**

**12:45 to 1:45 pm ~ Ethics: Red Flags in Elder Law Planning: Linda Tabory, Leawood, Kansas:**

The complex world of Elder Law Planning can involve multiple generations and non-traditional estate planning techniques. Once you know the technical rules then you need to be aware of the warning signs of possible ethical issues. This session will set out some of those red flags as well as strategies for overcoming some issues and when you need to take another course of action. Discussion will include who is your client, how to competently represent your client and dealing with clients with diminished capacity.

**1:45 to 2:45 pm ~ How to Turn a Standard Trust into a "Special Needs Trust": Craig Reaves, CELA, CAP, Kansas City:**

This presentation will describe how to draft a third party-settled special needs trust. Participants will learn about the different types of special needs trusts, clauses that are important to include in a Special Needs Trust, and clauses which are standard in many trusts that should be left out. In addition, advantages and disadvantages of the different ways to establish and structure the trust will be covered. At the end of the presentation participants will have the information needed to convert a standard living trust document into a Special Needs Trust.

**2:45 to 3:00 pm ~ Break with Exhibitors**

**3:00 to 4:00 pm ~ VA Basics: Samantha Shepherd, CELA, Kansas City:**

This presentation will describe the types of benefits you should be thinking about when you have a Veteran, or the surviving spouse of one in your office. Learn the basics of Service-Connected, Non-Service Connected, Nursing Home and Medical VA benefits. Eligibility requirements for Non-Service Connected benefits will be covered in detail.

**4:00 pm ~ Wrap up and Evaluations**

**Please stay and join us for the MoNAELA Reception immediately following the program.**

**2016 Summer Program  
"The Basics of Elder Law...  
come find the answers"  
June 17th, 2016**

**Rates for Program:**

NAELA member: \$295.00

Non-NAELA Member: \$345.00

\*\$80.00 discount offered on rates for second or more attorneys from same firm

**Registration Form:**

Name: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

**Additional Attorney Attendees:**

Name: \_\_\_\_\_

E-mail: \_\_\_\_\_

Name: \_\_\_\_\_

E-mail: \_\_\_\_\_

**I/we plan to go to the Royals game on June 17th.  
Number of tickets needed \_\_\_\_\_ at \$37.00 each.  
Deadline to pay for tickets is June 1, 2016!!  
Limited number of tickets available**

Amount Enclosed: \_\_\_\_\_  
for \_\_\_\_\_ # of Attorneys & \_\_\_\_\_ # of tickets.

**Please make checks payable to MO NAELA  
Mail to: 2420 Hyde Park Road, Suite A,  
Jefferson City, MO 65109**

For cancellations at least 48 hours 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 no more than 30 days after the event date.