

**Missouri Chapter of the National
Academy of Elder Law Attorneys
Presents:**

**2016 MoNAELA
Annual Symposium**
*"A Focus on Trusts in the Elder
Law Practice"*

Sponsored by:



**December 2-3, 2016
Holiday Inn Country Club Plaza
One East 45th Street, Kansas City, MO**

Lunch sponsor



Reception Sponsor

THE PALUMBO GROUP
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Conference Schedule

Friday, December 2, 2016

7:30—8:15 AM	Registration and Continental Breakfast
8:15—8:30 AM	Welcome and Opening Remarks - Moderator: Jessica Kruse, President MoNAELA Sponsor: Country Club Trust Company
8:30—9:30 AM ATTORNEY	Alternative to Trusts —Is a special needs trust always the best option for handling money for a person who has special needs? If so, what type should it be? And if not, what other options are there? This presentation will cover the practical aspects of counseling a client who has these questions. Speaker: Craig Reaves, CELA, Fellow, CAP, Kansas City, MO
8:30—9:30 AM PARALEGAL	How to Organize Medicaid Packets — Learn the do's and don'ts of preparing MO HealthNet applications from Family Support Division officials themselves. Miller County FSD members will provide insights on organizing and submitting MO HealthNet applications, including tips on how to avoid common mistakes that can delay the application process. Speakers: Shellie Bledsoe and Dawn Rising, Department of Social Services, Family Services Division, Miller County Specialized Processing Unit, Eldon, MO and Umo Ironbar, Assistant Special Counsel , DSS, FSD, Division of Legal Services.
9:30—9:45 AM	Break— Visit Exhibitors
9:45—11:00 AM ATTORNEY	Beyond the MIDGT: The federal statutes provide for other trusts that are exempt for Medicaid qualifying purposes. Too often practitioners rely on the MIDGT (Medicaid Qualifying Intentional Defective Grantor Trust) as the sole planning technique to use. This session will discuss sole benefit trusts, spousal annuity trusts, c2bi trusts among other trusts. This is a must attend session for the elder law attorney. Speaker: Bob Mason, CELA, CAP, Asheboro, NC
9:45 —10:45 AM PARALEGAL	Mechanics of Funding/Un-funding Trusts — A trust is just a piece of paper until it is funded. Country Club Trust officers will provide guidance on funding trusts to help avoid common mistakes. They will also provide tips for transferring assets out of a trust. Speakers: Jonathan Klem and Alisha Thomson, Country Club Trust Company, Kansas City, MO
10:45 —11:00 AM	Break—Paralegals only
11:00 AM-Noon ATTORNEY	Miller Trusts —Miller Trusts can be a tool in every Missouri elder law attorney's practice. In the right scenario, Miller Trusts can assist clients with higher than allowable income to become eligible for Waiver Services. Ms. Karraker has recently worked with the state on getting several clients eligible using Miller Trusts and is able to share some of the things she has learned along the way. Speaker: Vonne Karraker, JD, Farmington, MO
11:00 AM-Noon PARALEGAL	Medicaid Annuities —Annuities are a common tool used by attorneys to assist clients in planning for their long term care. 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. Speaker: Stuart Otto, Krause Financial Services, De Pere, WI
Noon—1:00 PM	LUNCH — Sponsored by ElderCounsel
1:00 —2:00 PM ATTORNEY	Retirement Benefits and SNTs —Retirement benefits like IRA's and 401k's are a common asset these days. Such retirement benefits may make up a large part of a client's estate. Because of the tax benefits, proper planning with these assets is of the utmost importance, especially when the client wishes these funds to be directed to a special needs beneficiary. Ms. Brown will particularly discuss options for planning that includes the specific interplay of retirement benefits and Special Needs Trusts. Speaker: Martha Brown, CELA, Fellow, CAP, St. Louis, MO
1:00—2:00 PM PARALEGAL	Mo HealthNet Approved! Now What? —Medicaid eligibility planning for one spouse must take into consideration the possibility that the Community Spouse may need to establish Medicaid eligibility in the future, or may pass away before the Institutionalized Spouse. There are also steps that must be taken immediately to maintain eligibility. This session will address these issues and practical techniques to avoid them. Speaker: Maureen Lester, JD, Overland Park, KS

2:00-2:15 PM	Break—Visit Exhibitors
2:15—3:45 PM ATTORNEY	Trust Litigation Panel —Former Probate Commissioner, Dan Wheeler, and newly retired Judge, Kathleen Forsyth of the Probate Division in Jackson County and esteemed practitioner, Bob Selsor, share their thoughts about trust litigation in Missouri. Their insights provide a unique perspective on effectively litigating trust matters and spotting potential problems when drafting trusts. Speakers: Daniel P. Wheeler, JD, Liberty, MO; Honorable Kathy Forsyth, Kansas City, MO; Robert J. Selsor, JD, St. Louis, MO; Moderator: Timothy J. Murphy, JD, Kansas City, MO
2:15—3:45 PM PARALEGAL	Handling Difficult Clients—Un-program — What is taking so long? Why can't we do this? My neighbor was able to do this. Sound familiar? Moderator Brigid Fernandez, CELA, St. Louis, MO , an elder law attorney and former social worker, will lead a discussion among attendees about how they have addressed difficult clients, and share tips on how to address difficult situations.
3:45 –4:00 PM	Break— Visit Exhibitors
4:00—5:00 PM ATTORNEY	Trust Administration: Practical Checklists —Lawyers often take on the burden of organizing a Trust Estate when hired to assist in administering a trust. Mr. Smith will provide practical tips and checklists to efficiently work through this process. Speaker: Cort Smith, JD, St. Charles, MO
4:00—5:00 PM PARALEGAL	What is Giving Legal Advice/Unauthorized Practice of Law —As paralegals, you are constantly balancing the sometimes competing goals of providing excellent service to your clients and taking as much as possible off the plate of the attorney for the client while avoiding the unauthorized practice of law. This session will provide guidance on what is considered giving legal advice, and when you as a paralegal need to involve your attorney. Speaker: Linda Tabory, JD, Overland Park, KS
5:00—5:30 PM	NETWORKING RECEPTION Sponsored by The Palumbo Group of Oppenheimer & Co. Inc
Saturday, December 3, 2016	
8:00-8:30 AM	BREAKFAST BUFFET
8:30—9:30 AM ALL	Ethics: Techniques for Resolving “Pre-Litigation” Trust Disputes While Maintaining Duties to Your Client – When dealing with family matters, as elder law attorneys do, practitioners are often asked to remain involved, even after the death of a client. With no living client, what duties does the attorney have to the rest of the family members? May the attorney now begin representing the trustee of a trust he drafted? May the attorney begin to represent a beneficiary of a will s/he created for the late client? Ms. Rittman will discuss how to avoid trust disputes while maintaining duties to your client and the do's and don'ts of representing other parties in a related matter. Speaker: Sara Rittman, JD, Jefferson City, MO
9:30—9:45 AM	Break—Visit Exhibitors
9:45-10:45 AM ALL	Estate Recovery – This presentation will give a refresher on basic estate recovery topics, will discuss asset recovery litigation, and will walk through several examples of common estate recovery scenarios. Find out what the State is thinking in this area. Speakers: Assistant Attorney Generals Anna Connelly and Kelly Willyard, MO Attorney General's Office, Jefferson City, MO
10:45-11:45 AM ALL	Updating Outdated Estate Plans — With the increased asset limit that is subject to Estate Tax, many estate plans have become outdated in recent years. These outdated plans are often cumbersome during life and after the death of the settler. Learn effective ways to modernize these estate plans to better fit within current estate tax laws and client concerns for the surviving spouse and/or surviving descendants, as well as other considerations and tax planning opportunities. Speaker: Lori Gregory, JD, Kansas City, MO
11:45 AM-NOON	Closing remarks and complete evaluations
<p>Hotel Information: Guest rooms are available at Holiday Inn Country Club Plaza for \$125. The cutoff date is Friday, November 11, 2016. Call 1-866-280-6326 to make your reservations or use the following link: MoNAELA Group Discount Holiday Inn Reservations (Note: link is not compatible with all smart phones and tablets).</p> <p>Special Needs: If you have special needs, please submit your requirements to MoNAELA three weeks in advance of this event.</p> <p>Continuing Education: 11.7 hours including 1.2 Ethics MO Bar CLE, 11.7 hours KS Bar CLE (all pending)</p>	



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2420 Hyde Park Rd., Ste. A
Jefferson City, MO 65109



Save the Date!!
January 27, 2017
Membership Meeting in
Columbia, MO with
Mary E. O'Byrne,
Baltimore, MD, "Update
on Social Security
Administration
Treatment of Trusts"

MoNAELA 2016 Annual Symposium ~ Registration Form

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

Participant	Before 11/23/16	After 11/23/16
*NAELA 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) **\$80 discount offered on rates for second or additional paralegal from the same firm.**

Participant Information				
Name	Email	Attorney	Paralegal	Fee

Special Needs: _____ **Total Fees Enclosed \$** _____

Return Registration Form & 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 an application.
CANCELLATION POLICY: Cancellations 48 hours prior to the start of an event, a registration 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.