



MISSOURI CHAPTER NATIONAL  
ACADEMY OF ELDER LAW ATTORNEYS

*Presents:*

***2018 Winter Elder Law Symposium***

**November 29-30, 2018**

**Kansas City, MO**



*Kansas City Marriott Country Club Plaza  
4445 Main Street, Kansas City, MO 64111*



*Paralegal Track on Thursday, November 29th*

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® C O M P A N Y

## Conference Schedule ~ Thursday, November 29, 2018

9:00—10:00 AM	<b>Check-in and Visit Exhibitors</b>
10:00—10:15 AM	<b>Welcome and Opening Remarks - Moderator: Erin Merkle, JD, CELA, President MoNAELA</b>
10:15—11:05 AM <b>Attorneys</b>	<b><u>Getting Current: The 2018 Case Law Update</u></b> —This session will provide an update of select recent cases from Missouri and nationwide that every MoNAELA member needs to know. <b>Speaker: Rebecca Morgan, CAP, Professor of Elder Law, Stetson University, School of Law, Gulfport, FL</b>
10:15-11:05 AM <b>Paralegals</b>	<b><u>Free Research Resources</u></b> — This interactive seminar will provide paralegals with free research tools to help solve Medicaid questions by using Federal Law, State Law, and the Missouri Income Maintenance Manual; look up VA regulations using the Code of Federal Regulations; and answer Special Needs policy questions using the SSA's Program Operations Manual, among other tools. <b>Speaker: Maureen Lester, JD, Shepherd Elder Law, Overland Park, KS</b>
11:05—11:55 AM <b>Attorneys</b>	<b><u>Taxation of Special Needs Trusts</u></b> — Do tax questions tend to trip you up? This session will review high-level tax issues regarding transfers, trusts, and more. With recent changes to the tax code, brush up on your tax knowledge at this year's Symposium. <b>Speaker: Rodney Hipp, JD, CELA, Swanson Midgley, LLC, Kansas City, MO</b>
11:05-11:55 AM <b>Paralegals</b>	<b><u>Medicaid Topics</u></b> — This session will identify more complex topics that arise on Medicaid applications and how to deal with them. Examples include applications that are past due, difficult properties to value, and approval of annuities. <b>Speaker: Dawn Rising, Department of Social Services, Family Services Division, Miller County Specialized Processing Unit, Eldon, MO; Umo Ironbar, Special Counsel for the Department of Social Services (DSS) within the FSD, and; Michael Weeks, JD, CELA, The Weeks Group, St. Charles, MO</b>
11:55 AM—1:00 PM	<b>LUNCH — Visit Exhibitors</b>
1:00—1:50 PM <b>Attorneys</b>	<b><u>Arrival of Final Changes to VA Regulations</u></b> — Although new regulations were proposed in January 2015, the Veterans Administration has now announced their final regulations, creating some major changes to the VA Pension + Aid and Attendance benefit. How will this impact your approach to long-term care planning using this benefit? Local VA guru Michael Weeks will explain the changes and present practical options for practitioners to use in everyday practice. <b>Speaker: Michael Weeks, JD, CELA, The Weeks Group, St. Charles, MO</b>
1:00—1:50 PM <b>Paralegals</b>	<b><u>Unprogram</u></b> — No question is too small for this open-minded session! Discussion topics will include office management, how to deal with difficult clients and everything in-between. Please bring topics you wish to discuss and share with your fellow paralegals how to handle the issues you each face every day.
1:50—2:40 PM <b>Attorneys</b>	<b><u>POMS Updates and Review of In-kind Support and Maintenance (ISM)</u></b> — Continuing on the theme of the day to review recent changes in the law, Bill Hubbard will discuss updates to the POMS with an emphasis in reviewing the in-kind support and maintenance provisions. This review will highlight what changes you should make in your practice when advising clients about income and expenses and how these affect their needs-based benefits. <b>Speaker: William Hubbard, JD, CELA, CAP, Hubbard &amp; Kurtz, LLP, Kansas City, MO</b>
1:50—2:40 PM <b>Paralegals</b>	<b><u>How to File a VA Application and Dealing with the New Rules</u></b> — This session will review how to complete a VA application, the requirements for eligibility, and what to send to the VA. Will also talk about how to deal with requests for information from the VA, and how the new regulations impact eligibility guidelines. <b>Speaker: Amy Fennell, Paralegal, The Weeks Group, St. Charles, MO</b>
2:40—3:00 PM	<b>BREAK ~ Visit Exhibitors</b>
3:00—3:50 PM <b>Joint Session</b>	<b><u>Chapter 475 Gets a Makeover</u></b> —Major changes to the Revised Statutes of Missouri, specifically regarding rules for Guardianships and Conservatorships, were passed and are effective August 2018. A panel of experts will describe these changes and the impact to stakeholders. Judge Mark Styles will share how the Jackson County Probate Court interprets and handles the new changes, local expert Tim Murphy will share his point of view on the impact the changes have to clients, and our in-house expert from the eastern side of our State, Martha Brown, will share her thoughts on how St. Louis courts are handling the changes. <b>Speaker: Judge Mark Styles, Jackson County, MO Probate Court; Timothy Murphy, JD, Murphy &amp; Tobin Law Firm, Kansas City, MO; Martha Brown, JD, CELA, Martha C. Brown &amp; Associates, Kirkwood, MO</b>

## Conference Schedule ~ Thursday, November 29, 2018

<b>3:50—4:40 PM</b> <b>Joint Session</b>	<b>CONFIDENTIAL: Ethics of E-Mail</b> —Get your ethics credit here! With the speed at which technology changes, practitioners in today’s digital age must diligently ensure that digital tools, like e-mail, continue to comply with our ethical guidelines. Paralegals will join in this session, as it is increasingly important for all team members to be diligent about client confidentiality, viruses and other hazards that arise when using e-mail. <b>Speaker: Chris Stiegemeyer, Director of Risk Management, The Bar Plan, Jefferson City, MO</b>
<b>4:40—5:00 PM</b>	<b>Visit Exhibitors</b>
<b>5:00 PM</b>	<b>Networking Reception—Sponsored by</b> 

## Conference Schedule ~ Friday, November 30, 2018

<b>8:00—9:00 AM</b>	<b>Breakfast, Check-in and Visit Exhibitors</b>
<b>9:00—9:50 AM</b>	<b>Planning for the Life of an Individual with Special Needs</b> —Planning for the ongoing lifetime of those with special needs reaches beyond ordinary legal boundaries. There are practical issues to think about, such as the housing and ongoing care of someone with special needs. Attorney Mark Munson and professional Ann Koerner discuss these practical issues and how to handle them from a legal and life care planning perspective. <b>Speakers: Mark D. Munson, JD, CELA, Shepherd Elder Law Group, LLC; Overland Park, KS; Ann Koerner, President and Founder, National Care Advisors, Ohio</b>
<b>9:50—10:40 AM</b>	<b>Capacity Counseling in the Real World</b> —Take a peek into the office of three varied elder law practitioners to view each unique approach to a hypothetical client scenario where the capacity of a client is in question. Observe the questions posed and advice given while each attorney “meets” with a new client before your very eyes. <b>Speakers: Melissa Leavy, JD, The Elder Law Practice, St. Louis; Samantha Shepherd, JD, CELA, Shepherd Elder Law Group, LLC, Overland Park, KS, and; Linda Tabory, JD, Tabory Law, Overland Park, KS</b>
<b>10:40—11:00 AM</b>	<b>BREAK ~ Visit Exhibitors</b>
<b>11:00-11:50 AM</b>	<b>Professional Development – The Art &amp; Science of Recruiting and Retention</b> —Take a short break from substantive legal topics to hear from a local professional about recruiting the right people to your business and strategies to retain them. Brooke Rembold will discuss strategies to identify the staffing needs in your office, to anticipate the skills and personalities that will fit the position, how to find qualified candidates and how to train and retain them on your team. <b>Speaker: Brooke Rembold, MBA, Performance River, Overland Park, KS</b>
<b>11:50 AM—1:00</b>	<b>LUNCH — Visit Exhibitors</b>
<b>1:00—1:50 PM</b>	<b>Planning for the Community Spouse</b> —Your clients are faced with a Division of Assets and a grueling Medicaid application process. Everyone has taken painstaking efforts to ensure the best outcome possible for this particular client. Based on the unique needs of the Community Spouse, learn options and strategies from speaker Brian Quinn on how to structure plans for this spouse. What potential benefits or consequences does this pose for the Community Spouse should they need long-term care? What essential questions must be answered to determine the right plan? Leave this session with confidence to plan for the Community Spouse. <b>Speaker: Brian Quinn, JD, Quinn Estate and Elder Law, Manchester, MO</b>
<b>1:50—2:40 PM</b>	<b>Navigating Drafting, and Administration of Irrevocable Trusts</b> —The client has taken your advice to create an irrevocable trust. This session will highlight common drafting conundrums that arise when drafting irrevocable trusts and provide best practice solutions. Wes Coulson will walk through potential pitfalls for acting trustees and how to best counsel clients before, during and after the life of the trust to ensure proper administration. <b>Speaker: Wesley Coulson, JD, CELA, Coulson Elder Law, O’Fallon, IL</b>
<b>2:40—3:00 PM</b>	<b>Closing Remarks and Evaluations</b>

*Please plan to join us in January for the 2019 Winter Membership Meeting in Columbia, MO*



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

**Earn CLEs for  
Missouri and Kansas**

This program has been submitted to the Missouri and Kansas Bar for a maximum of 11 CLE hours including 1 Ethics CLE

<b>Participant Fee</b>	<b>On or Before 11/20/18</b>	<b>After 11/20/18</b>
NAELA Member – 1st	\$325	\$375
NAELA Member— 2nd or more (same firm)	\$245	\$295
Non-Member - 1st	\$400	\$450
Non-Member—2nd or more (same firm)	\$320	\$370
Paralegal	\$225	\$275
Paralegal—2nd or more (same firm)	\$145	\$195

**REGISTER ONLINE AT :** <https://www.naela.org/store/events/registration.aspx?event=CHAPMO1118>.  
The registration form is available at [www.monaela.org](http://www.monaela.org) on the Events Page or by contacting Diana Love at 573.634.7772 or at [diana@monaela.org](mailto:diana@monaela.org).

**HOTEL INFORMATION:** Guest rooms are available at Kansas City Marriott Country Club Plaza. Special guest rate is \$149 . Cutoff date is Wednesday, November 14, 2018. Reservations can be made at: Book your group rate for National Academy of Elder Law Attorneys Conference or by calling 800.810.3708. Use group code MoNAELA

**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.

**FINANCIAL HARDSHIP POLICY:** For assistance with the registration fee, contact [diana@monaela.org](mailto:diana@monaela.org) for an application.

**SPECIAL NEEDS:** If you have special needs, please submit your requirements to MoNAELA three weeks in advance.