



A block of rooms has been reserved at Drury Hotels at a rate of \$120.



380 Mulholland Drive
St. Charles, MO 63303

Reservations can be made by
Calling 1-800-325-0720 and refer
to group number 2377374.
Deadline is June 7th, 2019

Located at I-70 and South 5th
Street, the Drury Plaza Hotel
St. Charles is just minutes from
downtown St. Charles. Free
breakfast is served daily, as well
as free hot food and cold
beverages every evening at the
5:30 Kickback event.



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

Missouri Chapter National Academy of Elder Law Attorneys

Presents:

Mastering Administration of Special Needs Trusts

June 21, 2019
Bogey Hills Country Club
1120 Country Club Drive
St. Charles, MO



7.6 CLE hours requested from the MO Bar

Mastering Administration of Special Needs Trusts

SCHEDULE

8:30-8:45 AM

Welcome—Brian Quinn, President, MoNAELA

Opening Remarks—Moderator, Crystal M. Hawk, Welch & Hawk Estate Planning Center, Hannibal, MO

8:45-9:45 AM

Government Benefits 101 ~

MoHealth Net Basics:

~ Julie Berkowitz, CELA, Law Office of Julie Berkowitz, St. Louis, MO

Social Security, SSI, & SSDI Basics:

~ Keith W. Brunstrom, Brunstrom Law Office, P.C., Ashland, MO

Other Benefits ~ VA, Housing, and Medicare:

~ Melissa Leavy, The Elder Care Law Practice, LLC St. Louis, MO

9:50-10:50 AM

Questions a Trustee Needs to Answer when Administering a New Special Needs Trust:

~ Craig Reaves, CELA, Reaves Law Firm, Kansas City, MO

10:50-11:00 AM ~ BREAK

11:00 AM-12:00 NOON

Distribution Issues: Panel Discussion with Case Studies—Part I:

~ Cindy Cowden, VP Trust Services, HNB Bank, Hannibal, MO

~ Micah Huff, Edward Jones Trust Company, St. Louis, MO

~ William Hubbard, CELA, Hubbard & Kurtz, LLC, Kansas City, MO

~ Darryl Lynch, Oppenheimer & Company, Bellevue, WA

12:00 NOON-1:00 PM ~ LUNCH

1:00-1:50 PM

Distribution Issues, Part II: Continue with a Q&A Session with True Link

1:55-2:45 PM

De-Escalation of Volatile Situations and Handling Difficult People:

~ Sgt. Gary Robertson, St. Louis County Police Department, Division of Special Operations, Supervisor, Crisis Intervention Team Unit, St. Louis, MO

2:45-3:00 PM ~ BREAK

3:00-3:50 PM

Retirement Benefits and Tax Issues:

~ Wesley J. “Wes” Coulson, CELA, Coulson Elder Law, St. Louis, MO

3:55- 4:45 PM

The Pesky Little Details in Special Needs Trust Administration:

~ Martha C. Brown, CELA, Martha C. Brown & Associates, St. Louis, MO

4:45-5:00 PM

Closing Remarks and Evaluations

A special “thank-you” to our program sponsor True Link Financial



“Mastering Administration of Special Needs Trusts” June 21st, 2019

Registration fee: \$275.00

Registration Form:

Name: _____

Company: _____

Address: _____

Phone: _____

E-mail: _____

Additional Attendees:

Name: _____

E-mail: _____

Name: _____

E-mail: _____

Amount Enclosed: _____

**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.



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