



----- CLE SEMINAR -----

Legal Issues of the Aging

LIVE SEMINAR: **Friday, September 21, 2018 – Madison**
WEBCAST: **Friday, September 21, 2018**

REPLAY WEBCAST: **Thursday, October 4, 2018**
WEBCAST: **Tuesday, October 9, 2018**
WEBCAST: **Monday, October 15, 2018**
WEBCAST: **Wednesday, October 24, 2018**
WEBCAST: **Thursday, November 1, 2018**

CREDITS
7 CLE
1 EPR

7 CLE | 1 EPR

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Elder essentials

Aging clients often need financial, medical, and estate planning counsel – that’s a lot of information to keep up with. *Legal Issues of the Aging 2018* delivers insights on the most important developments affecting older clients in one place. Find helpful overviews of:

- Recent case law and court decisions
- Supported decision-making
- Older Americans Act (OAA)
- Elder Rights Project in Wisconsin
- Uniform Adult Guardianship Jurisdiction Act (UAGJA)

Digging into diminished capacity

A two-part keynote presentation discusses the intricacies of diminished capacity. Charles P. Sabatino, Director of the American Bar Association’s Commission on Law and Aging, will offer guidance on:

- Determining when or if diminished capacity is present
- Steps to take to carefully document interactions with such clients
- Why this extra work is essential for protecting you and your client
- How to continue with advance care planning in diminished capacity situations

The keynote continues with a look at the ethical implications of assessing capacity and working with diminished capacity clients. You’ll learn:

- How to determine when a client lacks capacity
- How to assess capacity
- Tools to use when your client is “on the fence”
- Accommodations to consider in your practice for diminished capacity clients

Register now!

Faculty

Planning Committee

Benjamin M. Adams
Adams & Woodrow, S.C., Neenah

Terry L. Campbell
Moertl, Wilkins & Campbell, S.C., Milwaukee

Iris M. Christenson
Christenson Johnson LLC, Fitchburg

Jeffrey J. Drach
Drach Elder Law Clinic LLC, Wausau

Margaret W. Hickey
Becker, Hickey & Poster, S.C., Milwaukee

Barbara S. Hughes
Christenson Johnson LLC, Fitchburg

Heather B. Poster *(also presenting)*
Becker, Hickey & Poster, S.C., Milwaukee

Kate Schilling *(also presenting)*
Greater Wisconsin Agency on Aging Resources, Madison

Daniel J. Walsh
One Law Group, S.C., De Pere

Carol J. Wessels *(also presenting)*
Wessels Law Office LLC, Mequon

Heather A. Wilson
Hill Glowacki LLP, Madison

Presenters

Helen Marks Dicks
AARP – State Issues Advocacy, Madison

Jon L. Fischer
McCarty Law LLP, Appleton

Roy Froemming
Froemming Law Office, Madison

Andrea Gage-Michaels
Legal Action of Wisconsin, Green Bay

Mark T. Johnson
Christenson Johnson LLC, Fitchburg

Ryan J. Long
Law Office of Sturgul & Long, Hurley

Charles P. Sabatino
Director – Commission on Law and Aging, American Bar Association, Washington, D.C.

This program is sponsored by:



Schedule

- 8:00 AM Registration**
- 8:30 AM Welcome and Introduction**
Iris M. Christenson
- 8:35 AM Case Law/Administrative/
Fair Hearing Decisions
Update**
Jon L. Fischer
Ryan J. Long
- 9:25 AM Supported Decision-Making
Agreements**
Supported decision-making agreements offer a new tool for individuals with a disability to have an advisor formally recognized for various aspects of their personal and financial affairs.
- Learn the scope and options of supported decision-making
 - Understand the relationship of a supported decision-making agreement with powers of attorney and guardianship
 - Delve into the details of the statutory form for an agreement, along with attorney-drafted supplemental documents
 - Gain expertise in advising individuals, their supporters, and entities asked to honor supported decision-making agreements
- Kate Schilling*
Mark T. Johnson
- 10:25 AM Break**
- 10:40 AM Keynote Presentation:
Working with Older Clients with Diminished Capacity: What's a Lawyer to Do?**
Charles P. Sabatino
- 11:40 AM Lunch (on your own)**
- 12:55 AM Keynote Presentation:
Working with Older Clients with Diminished Capacity: What's a Lawyer to Do? (continued)**
Heather Poster
Charles P. Sabatino
- 1:55 PM Panel Discussion:
An Introduction to the Uniform Adult Guardianship Jurisdiction Act (UAGJA)**
- UAGJA concepts in jurisdiction of guardianships, including home state, significant connection, and special jurisdiction
 - Transfer of guardianship from another state to Wisconsin under the UAGJA
 - Transfer of guardianship from Wisconsin to another state under the UAGJA
 - Registering out-of-state guardianships using the UAGJA
 - Ways in which Wisconsin's UAGJA differs from the uniform UAGPPJA
- Roy Froemming*
Carol J. Wessels
- 2:55 PM Break**
- 3:10 PM The Older Americans Act: What Is It, What Does It Cover, and How Does It Affect My Clients?**
- Understand the significance of OAA
 - Brief discussion of its current funding status
- Helen Marks Dicks*

- 3:40 PM Elder Rights Project Overview**
- Learn more about this project designed to provide free legal services to victims of elder abuse in Wisconsin
 - Understand the process for referring clients to the Elder Rights Project
 - Discover how to spot signs of abuse and when you should refer your client for assistance
- Andrea Gage-Michaels*
- 4:10 PM Program Concludes**

Following program start time, webcast replay schedule will vary slightly from above listed times.

Credits

This program has been submitted to the Wisconsin Board of Bar Examiners for up to **7.0 CLE credits including 1.0 Ethics and Professional Responsibility credit.**

The live seminar and live webcast on September 21, 2018 will also be submitted for Minnesota credit.

Location

Live Seminar

Madison, State Bar Center

5302 Eastpark Blvd., American Center,
(608) 257-3838

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Advising Older Clients and Their Families

Save 20% on the two-volume set of *Advising Older Clients and Their Families*. Plus, all seminar attendees receive a free two-week trial of the Books UnBound® version. Use discount code **CA2789** when you order online or by calling (800) 728-7788.*

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Print Book: #AK0187; Vol 1: 524+ pp.; 3rd ed. 2015-16 | Vol 2: 764+ pp.; 3rd ed. 2014-15
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Additional Learning Opportunities

Adult Guardian ad Litem Training 2018

Know how to handle GAL cases from appointment through payment. Review seminal cases on issues GALs frequently encounter. In addition, learn the ins and outs of psych evaluations from a clinical psychologist. **7 CLE**

CLE OnDemand™ Seminar: #CA2751D | Member: \$249 | Nonmember: \$329

On Borrowed Time: Emergency Estate Planning – 2018

Discover ways to overcome mental capacity, communication, and guardianship issues. Find out how banks, life insurance companies, and other financial institutions expedite estate planning needs. Understand actions to take based on the client's family structure or lack thereof, and more. **7 CLE**

CLE OnDemand™ Seminar: #CA2772D | Member: \$249 | Nonmember: \$329

Wispect Update 2018

Become familiar with the sections of the Social Security POMS dealing with SNTs. Hear advice on creating clear, accurate Wispect Contribution Agreements. Plus, find out how a relocation impacts the portability of and access to the SNT.

7 CLE

CLE OnDemand™ Seminar: #CA2745D | Member: \$249 | Nonmember: \$329

Guardianship and Protective Placement for the Elderly in Wisconsin

Be prepared to assist older clients when voluntary methods of care fail. This book is a comprehensive guide to law and practice under the guardianship and protective placement statutes. Topics include choosing a guardian, the role of the guardian ad litem and petitioner's attorney, and safeguards under the protective service system. (Includes 2017-18 supplement.)

Print Book: # AK0201; 236+ pp; 4th ed. 2015-16; Member: \$89 | Nonmember: \$109

Books UnBound® Subscription: #AE0201; Member: \$159 | Nonmember: \$199

The Guardian ad Litem Handbook

It's Wisconsin's most comprehensive guide to being a GAL. Find essential, practical information for handling the legal issues that can arise from serving as a GAL, and gain insight into understanding the human side of a case. (Includes 2016-17 supplement.)

Print Book: # AK0057; 700+ pp; 4th ed. 2012; Member: \$179 | Nonmember: \$229

Books UnBound® Subscription: #AE0057; Member: \$159 | Nonmember: \$199

Elder Law Forms Library

Elder law practice presents a diverse set of challenges, from financial planning to the difficult ethical issues that can arise during representation. The *Elder Law Forms Library* contains more than 60 documents to help you address these issues, including authorizations, checklists, motions, notices, orders, petitions, and sample letters. Every form is fully customizable and regularly updated to ensure it complies with statutory specifications.

Online subscription: # FB6000; Members only: \$89
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Course materials for those attending the seminar

Course materials are provided to seminar attendees in PDF format and are downloadable from *myStateBar* on wisbar.org up to four days prior to and 90 days after your seminar. The PDF format is ideal for creating an electronic library that is easily stored, searched, and shared. PDFs allow you to search multiple files at once, copy and paste desired paragraphs, or send the entire PDF to a colleague without leaving your desk.

Use Adobe Reader, GoodReader for iPad, or another free downloadable program to access the files from your computer, tablet, or mobile device during the seminar to make notes electronically, or print relevant sections ahead of time.

For live seminar attendees who prefer to receive course materials in printed format, please select the tuition option that includes printed materials for an additional \$20. You will also have access to the PDFs to get the benefit of both options.

Who should attend

- Elder law attorneys
- Estate planning lawyers
- Guardians ad litem for adults
- Health law attorneys
- Probate practitioners

How you'll benefit

- Review recent legislative, administrative, and case law changes
- Find out how to determine diminished capacity in a client and what actions to take
- Delve into the ethical implications of working with clients with diminished capacity
- Understand how the supported decision-making agreement works with POAs and guardianships
- Explore Wisconsin's recently passed Uniform Adult Guardianship Jurisdiction Act (UAGJA)
- Learn more about the Older Americans Act (OAA) and the Elder Rights Project (in Wisconsin)

Legal Issues of the Aging

Priority Code: S 3 6 0 6 B

SEMINAR TUITION	LIVE SEMINAR: With PRINTED Course Materials	LIVE SEMINAR: With Downloadable (PDF) Course Materials	WEBCAST SEMINAR: With Downloadable (PDF) Course Materials
<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$239	<input type="checkbox"/> \$219	<input type="checkbox"/> \$249
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$319	<input type="checkbox"/> \$299	<input type="checkbox"/> \$329
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