



Wispatch Update 2020

Program dates start April 24. Register today!

7 CLE

Wispect Update 2020

Co-produced with Wispect, Inc. and the Elder Law and Special Needs Section of the State Bar of Wisconsin

Special insights on SNTs

Wispect Update 2020 shares the latest developments affecting your aging or special needs clients who receive medical assistance or other entitlement benefits. Speakers from around the state and country will provide an important case law update, as well as share meaningful tips related to creating, distributing, and administering special needs trusts. They'll discuss:

- Dealing with third-party special needs trusts (TPSNT) funding issues
- Documentation plans for disability applications
- Planning for someone with special needs who may receive means-tested benefits
- Advising non-corporate trustees on the terms of a special needs trusts and their fiduciary duties
- And more!

Who should attend:

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

How you'll benefit:

- Learn how to proactively plan for third-party funds
- Hear ways to help clients through the disability application and denial process
- Receive tips for trust administration
- Know the options for third-party special needs trust distribution standards

Register now!

What is Wispect?

Wisconsin Pooled & Community Trusts, Inc. (Wispect) provides for the special needs of persons with disabilities without endangering their eligibility for public benefits or placement on waiting lists. These benefits include entitlement programs such as Supplemental Security Income, Medical Assistance, Social Security Disability Insurance, and Medicare. The benefits also include home and community-based services, such as the Community Integration, Options, and Support Programs. Wispect, Inc., a Wisconsin nonprofit corporation, establishes and manages the trusts.

Faculty

Program Chairs

Andrew G. Falkowski *(Also presenting)*
Falkowski Law Firm, LLC, West Bend

Eric DeGroot
Wispect, Inc., Madison

Presenters

Kimberly Cunningham
Capital First Trust Company, Milwaukee

Jon Fischer
McCarty Law, LLP, Appleton

Bradley J. Frigon
Law Offices of Bradley J Frigon, LLC
Englewood, CO

Roy W. Froemming
Froemming Law Office, Madison

Peter E. Grosskopf
Grosskopf Law Office LLC, Eau Claire

Kevin Hayde
Wispect, Inc., Madison

Mark T. Johnson
Christenson Johnson LLC, Fitchburg

Ron J. Konkol
Ron Konkol Consulting, Madison

Kristen M. Lewis
The Bowden Law Firm, LLC
Atlanta, GA

Chantelle M. Ringe
Hill Glowacki, LLP, Madison

Meghan M. Teigen
Johnson Teigen, LLC, Fitchburg

Peter J. Wall
Director of Fiduciary Services
True Link Financial
Golden, CO

Registration

ONLINE: www.wisbar.org/seminars

PHONE: (800) 728-7788

FAX: (608) 257-5502

MAIL: State Bar PINNACLE
Registrations
P.O. Box 7158, Madison, WI
53707-7158

State Bar CLE/PINNACLE Passbook Registrations:

Passbook Certificates must be received by the State Bar at least one business day prior to the event. For live seminars, walk-in registrations with Passbook Certificates are welcome.

Registration Cancellations:

Please visit wisbar.org/cancellation_policy for information on PINNACLE registration cancellation policies.

Course materials for those attending the seminar:

Course materials are provided in PDF format and are downloadable from *myStateBar* on wisbar.org up to four days prior to and 90 days after your seminar. For live seminar attendees who prefer a printed format, please select the tuition option that includes printed materials for an additional \$20.

This program is sponsored by:



Schedule

- 8:00 AM Registration**
- 8:30 AM Overview of Wispact and Introduction to New Trustee, True Link Financial, and Capital First Trust Company**
Kimberly Cunningham, Bradley J. Frigon, Kevin Hayde, Peter J. Wall
- 9:10 AM Third-Party Special Needs Trusts: Drafting and Administration Considerations**
- Understand the “network” of TPSNTs that comprise a comprehensive special-needs plan
 - Analyze TPSNT funding issues
 - Identify the “team of allied professionals” that support the TPSNT beneficiary and trustee
 - Know the options for TPSNT distribution standards
Bradley J. Frigon, Kristen M. Lewis
- 10:20 AM Break**
- 10:35 AM Annual Case Law Update**
- Current cases impacting special needs trusts
 - Update on statutory changes
Peter E. Grosskopf
- 11:05 AM Status of SSI POMS Updates and HUD’s Treatment of SNT Distributions as Income**
- Implementation and possible future effects of the 2018 and 2019 SSI POMS changes
 - The risk that all distributions from SNTs will be treated as income for purposes of subsidized housing under HUD policy
 - Likely future treatment of SNTs under proposed HUD regulations implementing the Housing Opportunity Through Modernization Act of 2016 (HOTMA)
Roy W. Froemming
- 11:50 AM Lunch (on your own)**
- 1:00 PM How to Hack the System: Disability Application Help Before a Denial**
- Wisconsin disability hearing experience
 - Benefits lost while waiting for a denial
 - Application approach & documentation plan
 - Increased payments & healthcare guarantees
Ron J. Konkol
- 1:55 PM Attorney Toolbox and Options for Third-Party Funds**
- Drafting and planning options for third-party funds
 - Educating clients on planning for someone with special needs who may receive means-tested benefits
 - Proactive planning for third-party funds
 - Tips for trust administration and availability of utilizing other available tools to assist with the optimal use of supplemental funds
Mark T. Johnson, Meghan M. Teigen

- 2:55 PM Break**
- 3:10 PM Advice and Cautionary Warnings for Non-Corporate Trustees Including Special/Supplemental Needs Trusts and Testamentary Special Needs Trusts**
- Helping a trustee understand the terms of the trust, their fiduciary duties, the beneficiary’s benefits and needs, and budgeting the trust funds accordingly
 - Guidance and advice to trustees of a trust for a minor and the interplay with parental duty of support
 - Testamentary special/supplemental needs trusts for parents
 - Wisconsin Uniform Trust Code trustee requirements
 - Important tax issues all trustees should be aware of
 - Use of caregivers and various contracting issues that may be involved
Andrew G. Falkowski, Jon Fischer, Chantelle M. Ringe, Peter J. Wall
- 4:15 PM Program Concludes**

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

Dates Location

LIVE MADISON SEMINAR:	LIVE WEBCAST:	WEBCAST REPLAYS:
Friday, April 24, 2020 State Bar Center 5302 Eastpark Blvd. Madison, WI (608) 257-3838	Friday, April 24, 2020	Thursday, April 30, 2020 Friday, May 8, 2020 Wednesday, May 13, 2020 Monday, May 18, 2020 Thursday, May 28, 2020

Credits

This program has been submitted to the Wisconsin Board of Bar Examiners for up to **7 CLE credits**. It does not qualify for EPR credit.

Elder Law and Special Needs Section members who attend the April 24 in-person presentation in Madison will receive a \$50 tuition discount.

See registration form in this brochure for more information.

Wispect Update 2020

Priority Code: S 3 8 3 4 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"/> \$249	<input type="checkbox"/> \$229	<input type="checkbox"/> \$259
<input type="checkbox"/> ELSN Section Member*	<input type="checkbox"/> \$199	<input type="checkbox"/> \$179	<input type="checkbox"/> \$259
<input type="checkbox"/> Non-State Bar Member	<input type="checkbox"/> \$329	<input type="checkbox"/> \$309	<input type="checkbox"/> \$339
<input type="checkbox"/> Ultimate Pass Subscriber	<input type="checkbox"/> \$20	<input type="checkbox"/> \$0	<input type="checkbox"/> \$0
<input type="checkbox"/> Passbook Certificate User	<input type="checkbox"/> \$20 + 1 Certificate	<input type="checkbox"/> 1 Certificate	<input type="checkbox"/> 1 Certificate

Seminar Date/Location:

- Live Seminar:** Friday, April 24, 2020 – Madison
- Live Webcast:** Friday, April 24, 2020
- Webcast Replay:** Thursday, April 30, 2020
- Webcast Replay:** Friday, May 8, 2020
- Webcast Replay:** Wednesday, May 13, 2020
- Webcast Replay:** Monday, May 18, 2020
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* The \$50 Elder Law and Special Needs (ELSN) Section member discount **applies ONLY to the April 24, 2020 in-person Madison seminar** (not webcasts or CLE OnDemand). ELSN Section members with Ultimate Passes, other CLE passes, or PINNACLE discounts are not eligible for this discount. The ELSN Section may discontinue this discount at any time.

Lawyer State Bar Member No. _____

Nonlawyer Profession _____

Name _____

Firm Name _____

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City/State/Zip _____

Phone Number _____

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Payment: Tuition Amount Enclosed \$ _____

State Bar Passbook Certificate (enter certificate number) # _____

Check enclosed (payable to State Bar PINNACLE)

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To purchase written course materials for those **not** attending this program, contact the State Bar at (800) 728-7788.

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Mail to: State Bar PINNACLE Registrations
P.O. Box 7158
Madison, WI 53707-7158

Event Code: CA2996 M W R R2 R3 R4 R5

Book Sale!

Advising Older Clients and Their Families

SAVE 20% on the two-volume set of *Advising Older Clients and Their Families*.^{*} Cases, statutes, and regulations governing important issues for elderly individuals, including housing, asset protection, health care decisions, Medicaid eligibility, and Social Security benefits.

Use discount code **CA2996** when you order online or call (800) 728-7788. Plus, all seminar attendees receive a free two-week trial of the *Books UnBound*[®] version.

Print Book: #AK0187; Vol 1: 524+ pp.; 3rd ed. 2015-16 (Includes the 2017-18 supplement)
Vol 2: 764+ pp.; 3rd ed. 2014-15 (Includes the 2018-19 supplement)

Member: ~~\$349~~ \$279.20 | **Nonmember:** ~~\$439~~ \$351.20

Books UnBound: #AL0003_SUB; **Member:** ~~\$269~~ \$215.20 | **Nonmember:** ~~\$323~~ \$258.40

^{*}Discount applies to both print and digital *Books UnBound* editions of this title and cannot be applied to previous purchases. Offer valid as long as CLE credit is available for this program. For *Books UnBound* users, discount may be applied to purchase of individual *Books UnBound* title only and may not be used on purchase of full library.



Additional Learning Opportunities

SAVE THE DATE: Adult Guardian ad Litem Training 2020

Review guardianship basics. Gain resources for navigating your role in unique cases where the statutes do not prescribe how to proceed. Discover how to take the lead when dealing with other counsel. Understand public benefits for the young adult with a disability. Hear a panel discussion on dealing with difficult families. **7 CLE**

Live Madison Seminar and Live Webcast: May 21, 2020

Webcast Replays: May 29, 2020 | June 4, 2020 | June 10, 2020 | June 16, 2020
June 24, 2020 | June 29, 2020 | July 9, 2020 | July 14, 2020

Guardianship and Protective Placement for the Elderly in Wisconsin

A small practice guide that will help you learn (or review) the basics of a simple guardianship proceeding involving an older adult. Plus, the book's many checklists will help you comply with all statutory requirements of dense Wisconsin laws. (Includes 2017-18 supplement and 2019-20 supplement)

Print Book: #AK0201; 236+ pp.; 4th ed. 2015-16; **Member:** \$95 | **Nonmember:** \$125

Books UnBound[®] Subscription: #AE0201_SUB; **Member:** \$175 | **Nonmember:** \$219

Elder Law Forms Library

Find forms anytime, anywhere you have an internet connection. Enjoy access to more than 60 documents, including authorizations, checklists, motions, notices, orders, and petitions.

Online subscription: #FSFB6000 | **Members only:** \$95/year
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