



# Legal Issues of the Aging 2020

Program dates start September 18. Register today!

7.5 CLE

# Legal Issues of the Aging 2020

**This program is endorsed by the Elder Law and Special Needs Section of the State Bar of Wisconsin**

## Crises and changes affecting long-term planning

Curbside will signings. Rule changes for retirement account contributions and withdrawals. Virtual client meetings. Elder law and estate planning have changed a lot in the past year.

*Legal Issues of the Aging 2020* will help you stay current with the latest issues affecting older adults, adults with disabilities, and their families. From how to safely execute estate planning documents during a pandemic to a review of SECURE Act impacts, you'll be prepared to help your clients get their affairs in order.

## Who should attend:

- Elder law and special needs attorneys
- Adult guardians ad litem
- Estate planning lawyers
- Probate attorneys

## How you'll benefit:

- Gain strategies for adjusting your practice during COVID-19
- Advise clients on whether they need to revise or revisit estate and retirement plans
- Explore changes in processing Medicaid renewals and other eligibility issues
- Receive your annual case law update

## Register Now!

**Elder Law and Special Needs Section members receive a \$25 tuition discount on the September 18 live webcast of this program.**

*See registration panel in this brochure for more information and to register.*

## Schedule

**9:00 AM Case Law/Administrative/Fair Hearing Decisions Update**  
*Amy K. Greske, Jennifer R. Imediegwu*

**9:20 AM Retirement Benefits and Medicaid Crisis Planning**  
• The rules of retirement benefits  
• Medicaid rules associated with retirement benefits  
• Options for planning with retirement benefits in Medicaid crisis cases  
*Mark D. Munson*

**10:30 AM Break**

**10:45 AM Estate Planning Under the SECURE Act, Including for Special Needs Trusts**  
• Rule changes for withdrawals of inherited IRAs  
• How trusts, including special needs trusts, are treated under the withdrawal rules  
• Planning options for your clients and their beneficiaries  
*Gregory J. Banchy, Mark T. Johnson*

**12:00 PM Lunch Break**

**1:00 PM The State of Wisconsin Ombudsman Program**  
• Long-term care advocacy for persons aged 60 and over  
• Key topics for long-term care advocacy  
• Long-term care advocacy under COVID-19  
*Kim Marheine*

**2:00 PM Ways Your Practice Has Changed During the COVID-19 Pandemic, Including Execution of Estate Planning Documents**  
• Practice impacts of COVID-19  
• Executing estate planning documents during a pandemic  
*Terry L. Campbell, Margaret Wrenn Hickey*

**2:55 PM Break**

**3:10 PM A Look at Selected COVID Policy Changes That Affect Our Clients**  
• Wisconsin's Medicaid waivers  
• Policies regarding access to clients in substitute care  
• Changes in processing Medicaid renewals and other eligibility issues  
*Carol J. Wessels*

**4:15 PM Program Concludes**

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

## Faculty

### Program Chair

**Andrew G. Falkowski**

Falkowski Law Firm LLC  
West Bend

### Presenters

**Gregory J. Banchy**

Banchy Law Center LLC  
Eau Claire

**Terry L. Campbell**

Moertl, Wilkins & Campbell, S.C.  
Milwaukee

**Amy K. Greske**

O'Neill Elder Law LLC  
Hudson

**Margaret Wrenn Hickey**

Becker, Hickey & Poster, S.C.  
Milwaukee

**Jennifer R. Imediegwu**

Moertl, Wilkins & Campbell, S.C.  
Milwaukee

**Mark T. Johnson**

Johnson Teigen LLC  
Fitchburg

**Kim Marheine**

State of Wisconsin Board on Aging and  
Long Term Care  
Madison

**Mark D. Munson**

Ruder Ware, L.L.S.C.  
Wausau

**Carol J. Wessels**

Wessels & Liebau LLC  
Mequon

## Dates

### Live Webcast

Friday, September 18, 2020

### Webcast Replay

Tuesday, September 29, 2020  
Saturday, October 3, 2020  
Wednesday, October 7, 2020  
Monday, October 12, 2020  
Tuesday, October 20, 2020  
Wednesday, October 28, 2020  
Friday, November 6, 2020

Additional webcast replay dates  
are available for this program. Visit  
[wisbar.org/seminars](http://wisbar.org/seminars) for more  
information and to register.

## Credits

This program has been submitted to the  
Wisconsin Board of Bar Examiners for up  
to **7.5 CLE credits**. It does not qualify for  
EPR credit.

## SECIARSHIPS

The Elder Law and Special Needs  
Section is pleased to offer five full  
scholarships to section members to  
attend the live webcast of *Legal Issues of  
the Aging 2020* on September 18, 2020.  
Applicants must be within five years of  
their graduation date from law school.  
For more scholarship qualifications and  
application information, visit [wisbar.org/LIAScholarship](http://wisbar.org/LIAScholarship). Deadline to apply  
is Friday, August 21. **Questions?** Please  
contact Section Coordinator Jane Corkery  
at [jcorkery@wisbar.org](mailto:jcorkery@wisbar.org).

## Registration

**ONLINE:** [www.wisbar.org/seminars](http://www.wisbar.org/seminars) » credit card or Ultimate Pass only

**PHONE:** (800) 728-7788 » credit card or Ultimate Pass only

**FAX:** (608) 257-5502 » credit card or Ultimate Pass only

**MAIL:** **State Bar PINNACLE Registrations**

**P.O. Box 7158, Madison, WI 53707-7158**

check, credit card, Passbooks, or Ultimate Pass

### State Bar CLE/PINNACLE Passbook Registrations:

Passbook Certificates must be received by the State Bar at least one business day prior to the event.

### Registration Cancellations:

Please visit [wisbar.org/cancellation\\_policy](http://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 two days prior to and 90 days after your seminar.

*This program is sponsored by:*



## Book Sale!

### Advising Older Clients and Their Families

**SAVE 20%** on the two-volume set of *Advising Older Clients and Their Families*.\* Better understand housing, asset protection, health care decisions, Medicaid eligibility, Social Security benefits, and more.

Use **discount code CA3022** 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: 512+ pp.; 4th ed. 2019-20

Vol 2: 764+ pp.; 3rd ed. 2014-15 (Includes 2016-17 and 2018-19 supplements)

**Member:** ~~\$360~~ \$288 | **Nonmember:** ~~\$450~~ \$360

**Books UnBound:** #AL0003\_SUB; **Member:** ~~\$295~~ \$236 | **Nonmember:** ~~\$369~~ \$295.20

\*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

#### Wispect Update 2020

Learn how to proactively plan for third-party funds. Hear ways to help your clients through the disability application and denial process. Receive tips for trust administration. Know the options for third-party special needs trust distribution standards. **7 CLE**

**CLE OnDemand Seminar:** #CA2996D; **Member:** \$259 | **Nonmember:** \$339

#### Wisconsin Elder and Disability Law Statutes 2020

This convenient compilation brings together the most important Wisconsin laws concerning issues relevant to elder or disability law practice. This comprehensive, easy-to-use reference tool will help you quickly find the answers you're looking for. (Updated annually)

**Print Book:** #AK0429E20; 566+ pp.; 2020; **Member:** \$72 | **Nonmember:** \$93

#### 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

## Legal Issues of the Aging 2020

Priority Code: S 3 9 0 9 B

SEMINAR TUITION Includes Downloadable (PDF) Course Materials	September 18 Live Webcast	Webcast Replays
<input type="checkbox"/> Elder Law and Special Needs Section Member*	<input type="checkbox"/> \$234	<input type="checkbox"/> \$259
<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$259	<input type="checkbox"/> \$259
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#### WEBCAST DATES:

**Live Webcast:** Friday, September 18, 2020  **Webcast Replay:** Monday, October 12, 2020  
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\*THE \$25 SECTION DISCOUNT applies ONLY to the September 18, 2020 live webcast of *Legal Issues of the Aging 2020* – NOT webcast replays or CLE OnDemand. Elder Law and Special Needs Section members with Ultimate Passes, other CLE passes, or PINNACLE discounts are not eligible for this discount. The Elder Law and Special Needs Section may discontinue this discount at any time.

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

Event Code: CA3022 W R R2 R3 R4 R5 R6 R7