



# An Introduction to Elder Law

Program dates start February 19. Register today!

6 CLE  
1 EPR

# An Introduction to Elder Law

**Endorsed by the State Bar of Wisconsin's Elder Law and Special Needs Section and Young Lawyers Division**

## Build up your elder law skills

With older individuals more at-risk for severe complications from COVID-19, the coronavirus pandemic highlighted the key role elder law practitioners play in society, as well as the need to plan ahead. *An Introduction to Elder Law* will review key substantive and procedural elements related to finances, health, estate planning, and decision-making authority. You'll discover effective planning techniques using assets, divestments, promissory notes and trusts, and more. Plus, explore solutions to key ethical conundrums in elder law practice using hypothetical illustrations.

## How you'll benefit:

- Receive solid grounding in elder law's essential elements
- Become familiar with medical assistance programs for the elderly
- Understand health care power of attorney and other life planning options
- Discover how guardianships and protective placements work
- Learn planning strategies under the Wisconsin Trust Code
- Explore estate recovery tactics

## Who should attend:

- Estate planning/probate lawyers
- Marital property lawyers
- Guardians ad litem for adults
- Attorneys looking to add elder law to their practice
- Elder law attorneys seeking a refresher

**Register today!**

## Registration

**Online:** [www.wisbar.org/seminars](http://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.

### 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](http://wisbar.org) up to two days prior to and 90 days after your seminar.

### Young lawyers save \$20!

PINNACLE knows that you're at the critical point in your career where you're developing your skills and practice, which is why Young Lawyers Division Members\* receive \$20 off any of the Build Your Practice seminars.

**\* Young Lawyers Division Members:** State Bar member attorneys 36 years of age or younger or within five years of admission to the State Bar of Wisconsin. If you've opted out of YLD, you will not receive this discount.

### About the Build Your Practice Series

The Build Your Practice Series from State Bar of Wisconsin PINNACLE® introduces you to the fundamentals of various practice areas. Gain the tools and information you need to develop a new area of practice and expand your firm's offerings. Build Your Practice Series programs are endorsed by the State Bar's Young Lawyers Division.

*This program is sponsored by:*



# Schedule

## 8:30 AM Overview of Medical Assistance and Other Related Programs

- Asset and income eligibility
- Spousal impoverishment
- Basic divestment
- Community programs

*Margaret W. Hickey*

## 9:20 AM Durable Power of Attorney

- Role of legal counsel
- Choice of agents
- Springing or non-springing power
- Gifting provisions
- Other special provisions

*Dayna J. Lefebvre*

## 9:45 AM Health Care Power of Attorney

- Execution
- Special provisions – “Living Will” statement
- Considering religious influences
- Considering present illness or diagnosis
- Do Not Resuscitate orders

*Jessica A. Liebau*

## 10:15 AM Break

## 10:30 AM Guardianship and Protective Placement

- Guardianship and protective placement procedures
- Who may petition for guardianship
- Requirements for transfer to a nursing home under the Family Consent Act
- Post appointment pitfalls
- General strategies for handling contentious cases

*Kate Schilling*

## 11:15 AM Elder Law Case Study: Basic Planning Techniques

- Unavailable assets and purchase of exempt assets
- Divestment planning
- Use of promissory notes and trusts
- Maximizing resources for the community spouse
- Estate planning issues

*Heather A. Wilson*

## 12:00 PM Lunch Break

## 1:00 PM Estate Recovery

- Liens against the home
- Recovery from probate estate
- Non-probate recovery
- Act 20 and UTC changes

*Heather A. Wilson*

## 2:00 PM Ethics

- Ethics of Elder Law practice
- Hypotheticals

*Margaret W. Hickey, Carol J. Wessels*

## 2:50 PM Question and Answer

## 3:00 PM Program Concludes

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

# Faculty

## Program Chair & Presenter

### Margaret W. Hickey

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

## Presenters

### Dayna J. Lefebvre

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

### Jessica A. Liebau

Wessels & Liebau LLC, Mequon

### Kate Schilling

Greater Wisconsin Agency on Aging Resources, Madison

### Carol J. Wessels

Wessels & Liebau LLC, Mequon

### Heather A. Wilson

Hill Glowacki LLP, Madison

# Dates

## Webcast Seminar

Friday, February 19, 2021  
Thursday, February 25, 2021  
Wednesday, March 3, 2021  
Tuesday, March 9, 2021  
Monday, March 15, 2021  
Friday, March 26, 2021  
Wednesday, March 31, 2021  
Thursday, April 8, 2021

*The February 19, 2021 presentation will consist of a combination of prerecorded sessions and live webcast presentations along with a live Q&A session. All portions of this program for subsequent webcast dates will be prerecorded.*

## Scholarships available!

Three scholarships will be awarded by the State of Wisconsin Bar Elder Law and Special Needs Section (ELSN) for the February 19, 2021 webcast presentation of *An Introduction to Elder Law*. In order to be eligible for consideration, applicants must:

1. Be a member of the ELSN
2. Have recently graduated from law school (within 5 years of graduation date)
3. Have not previously received a scholarship from the Section for any prior event.

Submit your application to Jane Corkery at [jcorkery@wisbar.org](mailto:jcorkery@wisbar.org) by **February 5, 2021**.

# Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for up to **6 CLE credits including 1 Ethics and Professional Responsibility credit**.

## Book Sale!

### Advising Older Clients and Their Families

**SAVE 20%** on the two-volume set of *Advising Older Clients and Their Families*.\* The foremost guide to elder law for Wisconsin lawyers, this two-volume work discusses housing, asset protection, health care decisions, and much more. It's also full of tips for building an effective, compassionate elder law practice.

Use **discount code CA3136** 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

#### Legal Issues of the Aging 2020

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. **7.5 CLE**

**CLE OnDemand Seminar:** #CA3022D; **Member:** \$259 | **Nonmember:** \$339

#### 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 2020-21 supplement)

**Print Book:** #AK0057; 742+ pp.; 5th ed. 2018-19; **Member:** \$200 | **Nonmember:** \$250

**Books UnBound® Subscription:** #AE0057\_SUB; **Member:** \$180 | **Nonmember:** \$225

#### 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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Priority Code: S 3 9 5 8 B

### WEBCAST DATES\*

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<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$259
<input type="checkbox"/> YLD Member**	<input type="checkbox"/> \$239
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- Check enclosed (payable to State Bar PINNACLE)
- Ultimate Pass Gold Subscriber
- Ultimate Pass Silver Subscriber
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Event Code: CA3136 W R R2 R3 R4 R5 R6 R7