



Wispect Update 2021

Program dates start April 30. Register today!

**7 CLE
1 EPR**

Wispect Update 2021

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

Look out for their welfare

Wispect Update 2021 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 (SNTs). They'll discuss:

- Determining the legitimacy of a bill
- Ways to use Achieving a Better Life Experience (ABLE) accounts and SNTs together
- What to keep in mind when preparing clients to open an ABLE account
- And more!

Who should attend:

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

How you'll benefit:

- Get up-to-speed on the latest issues affecting SNTs
- Receive a valuable case law update
- Be able to explain financial tools to your clients
- Know how to address ethical concerns that could impact your practice

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

Eric DeGroot (Also presenting)
Wispect, Inc., Madison

Heather A. Wilson
Falkowski Law Firm, LLC, West Bend

Presenters

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

Stephen W. Dale
The Dale Law Firm, P.C.
Pacheco, CA

Peter E. Grosskopf
Grosskopf Law Office LLC
Eau Claire

Kevin Hayde
Wispect, Inc.
Madison

Elizabeth A. Heiner
Boardman & Clark LLP
Madison

Doug Jackson
Deputy Director of STABLE Accounts
Office of the Ohio Treasurer of State
Dayton, OH

Patricia E. Kefalas Dudek
Patricia E. Kefalas Dudek & Associates
Farmington Hills, MI

J. Cort Miller
Capital First Trust Company
Milwaukee

Bruce A. Tammi
Law Office of Bruce A Tammi
West Allis

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

Carol J. Wessels
Wessels Law Office LLC
Mequon



The Elder Law and Special Needs Section is offering five full scholarships available to section members. View scholarship requirements and the application at wisbar.org/wispectscholarship. The deadline to apply is Friday, April 9. Questions? Please contact Section Coordinator Jane Corkery at jcorkery@wisbar.org.

This program is sponsored by:



Schedule

8:30 AM Welcome and Overview of Wispact

Kevin Hayde, Executive Director

8:40 AM POMS Update

Patricia E. Kefalas Dudek

9:30 AM Case Law Update

- Recent regional and national cases involving Special Needs Trusts
 - Practice tips
- Peter E. Grosskopf*

10:15 AM Break

10:30 AM Guiding Trustees Through the Recoupment Process

- An overview of the recoupment process
 - Determining the legitimacy of a bill
 - Discuss what other states are doing
- Terry L. Campbell, J. Cort Miller, Bruce A. Tammi, Carol J. Wessels*

12:00 PM Lunch Break

1:00 PM Using ABLE Accounts in Conjunction with Special Needs Trust

- How ABLE accounts and Special Needs Trusts are being used together
 - Significance and functionality of SNT to ABLE transfers
 - Considerations in selecting an ABLE program to serve clients
- Doug Jackson*

1:50 PM The Good, the Bad, and the Unknown of Using ABLE Accounts

- The utility of ABLE accounts in trust administration and planning for people with disabilities
 - Evaluate coordination with SNTs administration
 - Analyze ABLE Act changes and facets of beneficiary distribution mechanisms as well as public benefits eligibility
 - Recent case law
- Stephen W. Dale, Eric DeGroot, Doug Jackson, Peter J. Wall*

2:40 PM Break

2:55 PM True Link Prepaid Debit Cards

- Demonstration of the client's online dashboard
 - Use cases and beneficiary empowerment
 - Coordination with SNTs and other fiduciary vehicles
- Peter J. Wall*

3:25 PM Ethical Considerations in Representing a Fiduciary

- Identifying the client
 - Potential conflicts: co-fiduciaries, beneficiaries, and decedents
 - The lawyer as fiduciary
 - A good fiduciary gone bad
- Elizabeth A. Heiner*

4:15 PM Program Concludes

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

Dates

Live Webcast

Friday, April 30, 2021

Webcast Replay

Friday, May 7, 2021
Thursday, May 13, 2021
Wednesday, May 19, 2021
Tuesday, May 25, 2021
Monday, May 31, 2021
Wednesday, June 9, 2021
Thursday, June 17, 2021

Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for up to **7 CLE credits including 1 Ethics and Professional Responsibility credit.**

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.

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 two days prior to and 90 days after your seminar.

Elder Law and Special Needs Section members who attend the April 30 live webcast will receive a \$50 tuition discount.

See registration form in this brochure for more information.

Book Sale!

Eckhardt's Workbook for Wisconsin Estate Planners

Save 20% on Eckhardt's Workbook for Wisconsin Estate Planners.*

An estate planning classic, the Workbook provides quick and clear answers to questions about drafting wills, nonprobate transfers, death taxes, revocable trusts, gifts, marital property agreements, buy-sell agreements for closely held businesses, living wills, powers of attorney, and much more.

Use discount code **CA3139** when you order online or by calling (800) 728-7788. Plus, all seminar attendees receive a free two-week trial of the Books UnBound® version.

Print Book: #AK0047; 930+pp.; 7th ed. 2018-19

Member: ~~\$280~~ \$224 | Nonmember: ~~\$350~~ \$280

Books UnBound® Subscription: #AE0047_SUB

Member: ~~\$190~~ \$152 | Nonmember: ~~\$237.50~~ \$190

*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

Adult Guardian ad Litem Training 2021

Learn the ins and outs of taking guardian ad litem appointments for adults. Discuss options for guardianships and placement, the rights of the ward, and understand the roles and the players through a helpful case study. **7 CLE/GALAD**

Live Webcast: May 14, 2021

Webcast Replays: May 21, 2021 | May 27, 2021 | June 2, 2021 | June 8, 2021 | June 16, 2021 | June 21, 2021 | June 30, 2021

Wisconsin Elder and Disability Law Statutes 2021

This annually-updated compilation collects key statutes relating to public benefits, protective services, serious illness, advance directives, trusts and trust fund investments, and other end-of-life planning matters.

Print Book: #AK0429E21; 582+ pp.; 2021; 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 (Discounts available on multi-user subscriptions.)

Wispect Update 2021

Priority Code: **S 3 9 6 3 B**

SEMINAR TUITION Includes Downloadable (PDF) Course Materials	April 30 Live Webcast	Webcast Replays
<input type="checkbox"/> Elder Law and Special Needs Section Member*	<input type="checkbox"/> \$209	<input type="checkbox"/> \$259
<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$259	<input type="checkbox"/> \$259
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$339	<input type="checkbox"/> \$339
<input type="checkbox"/> Ultimate Pass Subscriber	<input type="checkbox"/> \$0	<input type="checkbox"/> \$0
<input type="checkbox"/> Passbook Certificate User	<input type="checkbox"/> 1 Certificate	<input type="checkbox"/> 1 Certificate

WEBCAST DATES:

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Lawyer State Bar Member No. _____

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*THE \$50 ELDER LAW AND SPECIAL NEEDS (ELSN) SECTION DISCOUNT applies ONLY to the April 30, 2021 live webcast of Wispect Update 2021 – 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 Section may discontinue this discount at any time.

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

Event Code: CA3139 W R R2 R3 R4 R5 R6 R7