



Legal Issues of the Aging 2021

Program dates start September 24. Register today!

7 CLE
1 EPR

Legal Issues of the Aging 2021

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

Tackling today's issues and challenges

From asset division to Medicaid appeals, *Legal Issues of the Aging 2021* will provide updates and insights on a range of current legal, legislative, and financial issues affecting elderly clients. Plus, as society continues to wrap its head around a "new normal," presenters will explore questions like, "How will law practice change? What will stay the same? What new practices adopted during the pandemic will stick around?"

How you'll benefit:

- Better advocate for your clients in Medicaid Fair Hearings
- Review the child and caregiver exceptions to divestment rules
- Discover how to use a QDRO to handle retirement assets
- Keep your practice on track as the country enters new pandemic phases
- Receive an annual case law update

Who should attend:

- Elder law attorneys
- Guardians ad litem for adults
- Estate planning and probate lawyers

Register Now!

Elder Law and Special Needs Section members receive a \$50 tuition discount on the September 24 live webcast of this program.

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

Schedule

- 9:00 AM Case Law Update**
Amy Roehl Devine, Amanda Pirt Meyer
- 9:20 AM Using a QDRO to Deal with Retirement Assets, Family Court vs. Guardianship**
Margaret Wrenn Hickey, Chantelle M. Ringe
- 10:10 AM Break**
- 10:25 AM What Happens When We Return to Normal?**
 - What will the transition from pandemic to normal look like?
 - What notices should you expect?
 - What are the timelines?*Ryan Long, Kate Schilling, Meghan M. Teigen*
- 11:45 AM Lunch Break**
- 12:45 PM Handling a Fair Hearing**
Carol J. Wessels
- 1:45 PM Divestment Exceptions**
Heather B. Poster
- 2:45 PM Break**
- 3:00 PM Ethics and Malpractice Claims in Elder Law and Special Needs Cases**
 - Examples, issues, and trends in malpractice claims in estate planning, special needs trusts, guardianship, Medicaid planning, and duties to beneficiaries*Brian C. Anderson, Matthew M. Beier*
- 4:00 PM Program Concludes**

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

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www.wisbar.org/ondemand

Faculty

Program Chair

Heather A. Wilson
Hill Glowacki LLP, Madison

Presenters

Brian C. Anderson
Wisconsin Lawyers Mutual Insurance Co.,
Madison

Matthew M. Beier
Wisconsin Lawyers Mutual Insurance Co.,
Madison

Amy Roehl Devine
Haskins Short & Brindley LLC, Monona

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

Ryan Long
Sturgul & Long, S.C., Ashland

Amanda Pirt Meyer
Haskins Short & Brindley LLC, Monona

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

Chantelle M. Ringe
Hill Glowacki LLP, Madison

Kate Schilling
Greater Wisconsin Agency on Aging
Resources, Madison

Meghan M. Teigen
Johnson Teigen LLC, Fitchburg

Carol J. Wessels
Wessels & Liebau LLC, Mequon

Dates

Live Webcast

Friday, September 24, 2021

Webcast Replay

Thursday, September 30, 2021

Monday, October 4, 2021

Wednesday, October 13, 2021

Tuesday, October 19, 2021

Thursday, October 28, 2021

Friday, November 5, 2021

Wednesday, November 10, 2021

Additional webcast replay dates are available for this program. Visit wisbar.org/seminars for more information and to register.

Credits

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



The Elder Law and Special Needs Section is pleased to offer four full scholarships to attend the live webcast of *Legal Issues of the Aging 2021* on September 24. For scholarship qualifications and application information, visit wisbar.org/LIAScholarship. Deadline to apply is September 10, 2021. **Questions?** Please contact Section Coordinator Jane Corkery at jcorkery@wisbar.org.

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.

This program is sponsored by:



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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. Plus, all seminar attendees receive a free two-week trial of the Books UnBound® version.

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Additional Learning Opportunities

Unwrapping the Elements of Gifts Causa Mortis

Receive a refresher on the basic requirements for a valid will. Understand the elements that satisfy a gift causa mortis. Explore probate avoidance techniques. Stay current on issues affecting estate administration in Wisconsin. **1 CLE**

Live Webcast: Aug, 25, 2021

Webcast Replays: Sept. 2, 2021 | Sept. 8, 2021 | Sept. 13, 2021 | Sept. 23, 2021 | Sept. 28, 2021 | Oct. 6, 2021 | Oct. 15, 2021

Mental Health Law in Wisconsin: A Guide for Legal and Healthcare Professionals

The *Guide* offers a comprehensive, straightforward overview of how mental health issues and the law intersect. It includes ten chapters of pivotal information, including federal and Wisconsin-specific laws, written by Wisconsin judges, a court commissioner, a doctor specializing in neuroscience, and numerous experienced attorneys who represent people with mental health issues. With sample language, charts, and tables summarizing key information, the *Guide* can save you time no matter what task is in front of you that day

Print Book: #AK0440E01; 344+ pp.; 1st ed. 2020-21; **Member:** \$199 | **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

Legal Issues of the Aging 2021

Priority Code: S 4 0 0 B

SEMINAR TUITION Includes Downloadable (PDF) Course Materials	September 24 Live Webcast	Webcast Replays
<input type="checkbox"/> Elder Law and Special Needs Section Member*	<input type="checkbox"/> \$219	<input type="checkbox"/> \$269
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<input type="checkbox"/> Passbook Certificate User	<input type="checkbox"/> 1 Certificate	<input type="checkbox"/> 1 Certificate

WEBCAST DATES:

- Live Webcast:** Friday, September 24, 2021
- Webcast Replay:** Thursday, September 30, 2021
- Webcast Replay:** Monday, October 4, 2021
- Webcast Replay:** Wednesday, October 13, 2021
- Webcast Replay:** Tuesday, October 19, 2021
- Webcast Replay:** Thursday, October 28, 2021
- Webcast Replay:** Friday, November 5, 2021
- Webcast Replay:** Wednesday, November 10, 2021

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***The \$50 Elder Law and Special Needs Section member discount applies ONLY to the September 24, 2021 live webcast of *Legal Issues of the Aging 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 Elder Law and Special Needs Section may discontinue this discount at any time.**

Mail to: State Bar PINNACLE Registrations
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