



Wispect Update 2022

Program dates start April 1. Register today!

7 CLE

Wispect Update 2022

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

Protect your most vulnerable clients

Wispect Update 2022 is your trusted source for the latest developments affecting your aging clients or clients with special needs who receive medical assistance or other entitlement benefits. National and local presenters will provide an important case law update on Special Needs Trusts, an administrative law update, offer guidance on traversing the complicated intersection between immigration benefits and means-tested benefits, and much more!

A chance to catch up

Plus, NEW this year, attendees of the live webcast will be able to chat with colleagues and friends on our interactive virtual platform! Don't miss the chance to get the content you need wherever you are in a fun, user-friendly environment.

How you'll benefit:

- Stay up to date on the latest developments in Special Needs Trusts
- Know best practices for working with Medicare Set Aside Trusts
- Explore the use of charitable remainder trusts and retirement assets after the SECURE ACT
- Understand how immigration benefits impact means-tested benefits
- Discuss what to expect in your practice once the public health emergency comes to an end
- Receive important case law and administrative law updates
- Connect with fellow elder and special needs lawyers during the live webcast in an interactive virtual environment

Who should attend:

- Guardians ad litem for adults
- Estate planning practitioners
- Elder law attorneys
- Probate lawyers
- Family lawyers
- Lawyers representing clients receiving public benefits

Catch up with colleagues and gain invaluable insights from nationally known speakers and trust professionals at Wispect Update 2022!

Register now!

Schedule

- 8:30 AM** **Welcome and Overview of Wispect**
Kevin Hayde, Executive Director, Wispect, Inc.
- 8:40 AM** **POMS Case Law Update**
 - Recent regional and national cases involving Special Needs Trusts
 - Practice tips*Peter E. Grosskopf*
- 9:10 AM** **Administrative Law Update**
KC Kratochvill
- 9:30 AM** **Charitable Remainder Trusts and Retirement Assets After the SECURE Act**
Mark D. Munson
- 10:20 AM** **Break**
- 10:35 AM** **Taxation Nuances of PSNT Sub-Accounting**
Bradley J. Frigon, Peter J. Wall
- 11:25 AM** **Medicare Setaside Trusts: A Panel on How to Work Together**
Joe Anderson, Meghan M. Teigen
- 12:15 PM** **Lunch Break**
- 1:15 PM** **Immigrant Eligibility for Public Benefit Programs**
Janice Beers, Shannon Drake-Buhr
- 2:20 PM** **Unwinding the Public Health Emergency**
Kate Schilling
- 3:10 PM** **Break**
- 3:25 PM** **HUD-Subsidized Housing Issues (Financial Eligibility)**
Roy W. Froemming
- 4:15 PM** **Program Concludes**

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

Elder Law and Special Needs Section members who attend the April 1 live webcast will receive a \$50 tuition discount.

See registration form in this brochure for more information.

Faculty

Program Chairs

Eric DeGroot

Wispect, Inc., Madison

Kate Schilling *(Also presenting)*

Greater Wisconsin Agency on Aging Resources, Madison

Presenters

Joe Anderson

Medivest, Oviedo, FL

Janice Beers

Catholic Multicultural Center, Madison

Shannon Drake-Buhr

Covering Wisconsin, Madison

Bradley J. Frigon

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

Roy W. Froemming

Johnson Teigen LLC, Fitchburg

Peter E. Grosskopf

Grosskopf Law Office LLC, Eau Claire

Kevin Hayde

Wispect, Inc., Madison

KC Kratochvill

Wispect, Inc., Madison

Mark D. Munson

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

Meghan M. Teigen

Johnson Teigen LLC, Fitchburg

Peter J. Wall

Director of Fiduciary Services, True Link Financial, Denver, CO

Dates

Live Webcast

Friday, April 1, 2022

Webcast Replay

Thursday, April 7, 2022

Wednesday, April 13, 2022

Tuesday, April 19, 2022

Friday, April 29, 2022

Monday, May 2, 2022

Wednesday, May 11, 2022

Thursday, May 19, 2022

Tuesday, May 24, 2022

New this year!

The **live webcast on April 1, 2022** will utilize an interactive virtual environment that mimics an in-person conference, including a fully realized environment complete with a lobby, presentation hall, networking lounge, and more. Attendees will be able to view content on their favorite devices while they network with speakers and other legal professionals. This is not your ordinary webcast.

Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for up to **7 CLE credits**. It does not qualify for EPR 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/cancellations 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.

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.

There are also 5 full scholarships available

to Elder Law and Special Needs Section members. View scholarship requirements and

the application at wisbar.org/wispectscholarship. The deadline to apply is **Friday, March 11**. Questions? Please contact Section Coordinator Jane Corkery at jcorkery@wisbar.org.



This program is sponsored by:



Book Sale – Advising Older Clients and Their Families Vol. II

SAVE 20% on *Advising Older Clients and Their Families Vol. II*.
Plus, all seminar attendees receive a free two-week trial of the Books UnBound® version. Delve into Medicare and Medicaid, veterans' benefits, guardianship and protective placement, and more with the foremost guide to elder law.

Use discount code CA3287 when you order online at wisbar.org/ak0005 or by calling (800) 728-7788.

Print Book: #AK0005; 758+ pp.; 4th ed.; 2020-21
Member: ~~\$255~~ \$204 | Nonmember: ~~\$320~~ \$256

Books UnBound Subscription: #AE0005_SUB
Member: ~~\$199~~ \$159.20 | Nonmember: ~~\$248.75~~ \$199

*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 2022

Gain an overview of guardianship/protective placement from appointment to payment. Assess whether your case should be handled as a treatable mental illness or a guardianship. Understand how supported decision making can help individuals regain financial and other life control, avoid ethical pitfalls, and more. **7 CLE/GALAD | 1 EPR**

Live Webcast: May 13, 2022

Webcast Replays: May 20, 2022 | May 26, 2022 | June 1, 2022 | June 7, 2022
June 15, 2022 | June 20, 2022 | June 29, 2022 | July 12, 2022

Advising Older Clients and Their Families Vol. I

Written and reviewed by more than 20 of Wisconsin's premier elder law attorneys, this is the foremost guide to elder law in Wisconsin. Find the practice pointers, tips, charts, forms, and other tools essential to building and maintaining a successful elder law practice.

Print Book: #AK0004; 512+ pp.; 4th ed. 2019-20; Member: \$255 | Nonmember: \$320
Books UnBound Subscription: #AE0004_SUB; Member: \$199 | Nonmember: \$248.75

Elder Law Forms Library

Elder law practice presents a diverse set of challenges, from financial planning to the difficult ethical issues that can arise during representation. Enjoy access to more than 60 documents to help you address these issues, including forms, checklists, orders, and sample language provisions, all fully searchable by title and keyword.

Online subscription: #FSFB6000 | Members only: \$99/year
(Discounts available on multi-user subscriptions.)

Wispect Update 2022

Priority Code: S 4 0 6 7 B

SEMINAR TUITION Includes Downloadable (PDF) Course Materials	April 1 Live Webcast	Webcast Replays
<input type="checkbox"/> Elder Law and Special Needs Section Member*	<input type="checkbox"/> \$219	<input type="checkbox"/> \$269
<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$269	<input type="checkbox"/> \$269
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$349	<input type="checkbox"/> \$349
<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

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Lawyer State Bar Member No. _____

Nonlawyer Profession _____

Name _____

Firm Name _____

Address _____

City/State/Zip _____

Phone Number _____

Email _____

Payment: Tuition Amount Enclosed \$ _____

State Bar Passbook Certificate (enter certificate number) # _____

Check enclosed (payable to State Bar PINNACLE)

Ultimate Pass Gold Subscriber

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*THE \$50 ELDER LAW AND SPECIAL NEEDS (ELSN) SECTION DISCOUNT applies ONLY to the April 1, 2022 live webcast of *Wispect Update 2022* – 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: CA3287 W R R2 R3 R4 R5 R6 R7 R8