



Legal Issues of the Aging 2022

Program dates start September 23. Register today!

7 CREDIT HOURS CONSISTING OF:

- 6 CLE credit hours, including 1 EPR credit hour
- 1 LAU credit hour

Legal Issues of the Aging 2022

Co-produced with the Elder Law and Special Needs Section of the State Bar of Wisconsin

A beneficial update

With the changing demographics of our population, it's more important now than ever for attorneys working with older adults and special needs clients to be culturally competent. **Legal Issues of the Aging 2022** will give you practical guidance on working with members of different ethnicities and religious faiths so you can effectively represent all of your clients.

In addition to updates on case law and legislation, you'll learn ethical ways to "just say no" to clients and potential clients. Plus, you'll discuss what to expect for older and disabled clients who may face benefits challenges once the Public Health Emergency declaration expires.

How you'll benefit:

- Understand why cultural competence is key to effective representation
- Know what to expect from the new guardianship training requirement
- Find out how the anticipated end of the Public Health Emergency may impact clients
- Learn how to decline a client or end representation without running afoul of ethical rules
- Receive your annual case law and legislative updates

Who should attend:

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

Stay up-to-date on the best ways to assist older and disabled clients with the guidance you've come to expect from *Legal Issues of the Aging 2022*.

Register today!

Schedule

8:00 AM Registration

8:30 AM Case Law and Legislative Update
KC Kratochvill Watson, Alicia Rodriguez

9:20 AM DHS Update – Public Health Crisis Update
Kate Schilling

10:15 AM Break

10:30 AM Hot Topics in Guardianship

- Common issues in pre- and post-appointment guardianship matters
- Differences between counties when the statutes are silent
- Strategies for resolving problematic guardianship cases
- Develop best practices for meeting statutory timelines and service requirements

Jon Fischer, Jessica A. Liebau, Heather B. Poster

11:45 AM Networking Lunch
All attendees at the Madison in-person seminar are invited to enjoy a complimentary lunch sponsored by the Elder Law and Special Needs Section

12:45 PM An Introduction to and the Importance of Cultural Competency
Jacque Evans

1:35 PM Estate Planning for Muslims: Culturally Competent Estate Planning for Disabled Individuals

- An introduction to Muslim Culture and religion
- Islamic estate planning rules
- Working with Muslim estate planning clients and religious leaders
- Considerations for best assisting disabled individuals with their estate plan

Hamza Jaka

2:20 PM Tribal Culture: Estate Planning and Benefits
Hon. Gwendolyn Topping

3:05 PM Break

3:20 PM I'd Rather Be Walking My Dog: The Ethics of Client Selection and Termination
Jennifer Ann O'Neill, Heather B. Poster, Carol J. Wessels

4:10 PM Program Concludes

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

Faculty

Program Chair

Ryan Long

Sturgul & Long, S.C., Ashland

Presenters

Jacque Evans

State Bar of Wisconsin, Madison

Jon Fischer

McCarty Law LLP, Appleton

Hamza Jaka

Gardiner Koch Weisberg & Wrona,
Lake Geneva

Jessica A. Liebau

Wessels & Liebau LLC, Mequon

Jennifer A. O'Neill

O'Neill Elder Law LLC, Hudson

Heather B. Poster

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

Alicia Rodriguez

McCarty Law LLP, Appleton

Kate Schilling

Greater Wisconsin Agency on
Aging Resources, Madison

Hon. Gwendolyn Topping

Red Cliff Band of Lake Superior
Chippewa, Tribal Court, Bayfield

KC Kratochvill Watson

WisPACT, Inc., Madison

Carol J. Wessels

Wessels & Liebau LLC, Mequon

Dates Location

In-Person Seminar – Madison

Friday, September 23, 2022

State Bar Center

5302 Eastpark Blvd.
Madison, WI
(608) 257-3838

Live Webcast

Friday, September 23, 2022

Webcast Replay

Monday, October 3, 2022
Wednesday, October 12, 2022
Thursday, October 20, 2022
Tuesday, October 25, 2022
Thursday, November 3, 2022
Friday, November 11, 2022
Saturday, November 19, 2022
Wednesday, November 23, 2022

Additional webcast replay dates are available for this program. Visit 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 credit hours** consisting of:

- **6 CLE credit hours including**
 - **1 EPR credit hour**
- **1 LAU credit hour**

About LAU credits

Attorneys may submit up to 6.0 LAU (Lawyer Awareness and Understanding) credits per CLE reporting period. To learn more about CLE credit types and rules, visit wisbar.org/credits.

Registration

Online: 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. For in-person seminars, walk-in registrations using Passbook Certificates are also welcome.

Registration Cancellations: Please visit wisbar.org/cancellations for information on PINNACLE registration cancellation policies.

Course materials: Course materials are provided to seminar registrants in PDF format and are downloadable from *myStateBar* on wisbar.org up to two days prior to and 90 days after your seminar.

COVID-19 Safety Information: Attendees are asked to either be vaccinated or have a negative COVID-19 test administered within 48 hours of the event. Complete and current safety guidelines can be found at wisbar.org/covidsafety.

SCHOLARSHIPS

The Elder Law and Special Needs Section is pleased to offer five full scholarships for Section members to attend the in-person or live webcast presentation of *Legal Issues of the Aging 2022* on September 23, 2022. For scholarship qualifications and application information, visit wisbar.org/LIAScholarship. Deadline to apply is August 26, 2022. **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. I

SAVE 20% on the *Advising Older Clients and Their Families Vol. I*.^{*} Plus, all seminar attendees receive a free two-week trial of the Books UnBound® version. You'll discover practice pointers, forms, and other tools essential to building and maintaining an elder law practice.

Use **discount code CA3318** when you order online at wisbar.org/ak0004 or by calling (800) 728-7788.

Print Book: #AK0004; 542+ pp.; Revised 5th ed. 2021-22
Member: ~~\$275~~ \$220 | **Nonmember:** ~~\$343.75~~ \$275

Books UnBound Subscription: #AE0004_SUB
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Additional Learning Opportunities

Wispect Update 2022

Gain trusted insight from veteran practitioners on the latest trends affecting Special Needs Trusts, the continuing impact of the SECURE Act on retirement assets, and Medicare Set Aside Trusts. You'll also untangle the complex intersection between immigration and means-tested benefits to help non-citizen clients get the assistance they need. **7 CLE**

CLE OnDemand: #CA3287D; **Member:** \$269 | **Nonmember:** \$349

Advising Older Clients and Their Families Vol. II

This insightful overview of elder law contains guidance on protecting clients' rights and interests, ways to foster client relationships, and handling client interviews. It features citations to key cases, statutes, and regulations affecting asset protection, health care decisions, Medicaid eligibility, and more.

Print Book: #AK0005; 758+ pp.; 4th ed.; 2020-21; **Member:** \$275 | **Nonmember:** \$343.75
Books UnBound Subscription: #AE0005_SUB; **Member:** \$249 | **Nonmember:** \$311

Elder Law Forms Library

Save time with a forms library that puts easily searchable, high-quality forms to simplify your elder law practice at your fingertips 24/7. Make frustration and searching for the right form every time you need it a thing of the past with the Elder Law Forms Library.

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

Legal Issues of the Aging 2022

Priority Code: S 4 1 4 2 B

SEMINAR TUITION	IN-PERSON SEMINAR	WEBCAST SEMINAR
<input type="checkbox"/> State Bar Member	<input type="checkbox"/> \$239	<input type="checkbox"/> \$269
<input type="checkbox"/> Nonmember	<input type="checkbox"/> \$319	<input type="checkbox"/> \$349
<input type="checkbox"/> Ultimate Pass Gold/Silver	<input type="checkbox"/> \$0	<input type="checkbox"/> \$0
<input type="checkbox"/> Ultimate Pass Bronze	<input type="checkbox"/> \$239	<input type="checkbox"/> \$0
<input type="checkbox"/> Passbook Certificate	<input type="checkbox"/> 1 Certificate	<input type="checkbox"/> 1 Certificate

IN-PERSON SEMINAR:

Friday, Sept. 23, 2022 – Madison

LIVE WEBCAST:

Friday, Sept. 23, 2022

WEBCAST REPLAYS:

Monday, Oct. 3, 2022

Wednesday, Oct. 12, 2022

Thursday, Oct. 20, 2022

Tuesday, Oct. 25, 2022

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Friday, Nov. 11, 2022

Saturday, Nov. 19, 2022

Wednesday, Nov. 23, 2022

Lawyer State Bar Member No. _____

Nonlawyer Profession _____

Name _____

Firm Name _____

Address _____

City/State/Zip _____

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