



STATE BAR OF WISCONSIN

**PINNACLE**

*Your Practice. Our Purpose.*



# Wispatch Update 2023

**Program dates start April 28. Register today!**

**7 CLE  
1.5 EPR**

# Wispect Update 2023

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

## Trust in it

Wispect Update 2023 is your trusted source for the latest information on a wide range of topics affecting aging clients and those with special needs. Experienced practitioners and professionals from across the country will provide case law updates on special needs trusts (SNTs) and explore the ins and outs of structured settlements, annuities, and trusts. You'll also examine key tax considerations and asset protection strategies for wealthy clients.

Get sound guidance on how to assist clients when the COVID-19 public health emergency expires, as well as tips on navigating ethical issues common to elder law practice.

## How you'll benefit:

- Discuss potential impacts of the expiring public health emergency declaration
- Receive modern planning advice from a geographically diverse panel
- Understand the nuances of working with structured settlements
- Review important considerations when planning for families with high net worth

## Who should attend:

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

Ensure you're up to speed on the latest developments impacting the interests of aging and special needs clients with help from Wispect Update 2023.

**Register today!**

## Schedule

- 8:00 AM Registration**
- 8:30 AM Welcome and Overview of Wispect**  
*Kevin Hayde, Executive Director, Wispect, Inc.*
- 8:40 AM Case Law Update**
- Recent regional and national cases involving Special Needs Trusts
  - Practice tips  
*Peter E. Grosskopf*
- 9:20 AM Structured Settlements, Annuities, and Trusts: What You Need to Know**
- A glimpse into the upstream activities that shape a structured settlement
  - Review of the dynamics of settlement negotiations
  - Review of tax fundamentals and the value exchanged  
*Henry L. Strong*
- 10:10 AM Break**
- 10:25 AM Special Needs Planning for the High-Net-Worth Family**
- Tax impacts and considerations
  - Asset and creditor protection
  - SECURE Act 2.0  
*Mark D. Munson*
- 11:25 AM The End of the Public Health Emergency**
- Understanding the end of Medicaid continuous enrollment
  - Impacts and what's to come  
*Presenter to be announced*
- 12:15 PM Lunch (on your own)**
- 1:15 PM Shifting Sands: The Changing Landscape of Public Benefits Planning**
- Ethics of divestment planning
  - Facility and housing issues
  - Family members as caregivers  
*Amy K. Greske, Ryan Long, Heather B. Poster, Meghan M. Teigen*
- 2:45 PM Break**
- 3:00 PM Mom Always Liked You Best: The Five "Cs" of Ethically Dealing with Families**
- Ethical considerations when dealing with family members
  - Understanding and communicating the identity of the client and remembering that the client's objections are paramount
  - Possible conflicts that may arise  
*Roberta (Bobbi) K. Flowers*
- 4:15 PM Program Concludes**

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

## Faculty

### Program Chairs

#### Eric DeGroot

Wispect, Inc., Madison

#### Ryan Long

Sturgul & Long, S.C., Ashland

### Presenters

#### Roberta (Bobbi) K. Flowers

Stetson University College of Law,  
Gulfport, FL

#### Amy K. Greske

O'Neill Elder Law LLC, Hudson

#### Peter E. Grosskopf

Grosskopf Law Office LLC, Eau Claire

#### Kevin Hayde

Wispect, Inc., Madison

#### Mark D. Munson

Ruder Ware LLSC, Wausau

#### Heather B. Poster

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

#### Henry L. Strong

JMW Settlements LLC, Washington, D.C.

#### Meghan M. Teigen

Johnson Teigen LLC, Fitchburg

## Dates / Location

### In-Person Seminar

Friday, April 28, 2023

#### State Bar Center

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

### Live Webcast

Friday, April 28, 2023

### Webcast Replays

Monday, May 8, 2023

Wednesday, May 17, 2023

Tuesday, May 23, 2023

Thursday, June 1, 2023

Friday, June 9, 2023

Wednesday, June 21, 2023

Thursday, June 29, 2023

Tuesday, July 11, 2023

## Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for **7 CLE credits including 1.5 Ethics and Professional Responsibility credits.**

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

**Registration Cancellations:** Please visit [wisbar.org/cancellations](http://wisbar.org/cancellations) for information on PINNACLE registration cancellation policies.

**Course Materials for Attendees:** 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.

**COVID-19 Safety Information:** Complete and current safety guidelines can be found at [wisbar.org/covidsafety](http://wisbar.org/covidsafety).

## 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.

*This program is sponsored by:*



### The Elder Law and Special Needs Section

is offering five full scholarships to section members for the in-person program or live webcast on April 28, 2023. View scholarship requirements and the application at [wisbar.org/wispectscholarship](http://wisbar.org/wispectscholarship). The deadline to apply is **Wednesday, April 12**. Questions? Please contact Section Coordinator Kara Olson at [kolson@wisbar.org](mailto:kolson@wisbar.org).



## Book Bonus!

### Advising Older Clients and Their Families Vol. II

Seminar attendees will enjoy a **free two-week trial** of the *Advising Older Clients & Their Families Vol. II Books UnBound*® title and an invitation to **save 20%** on either a one-year subscription to the Books UnBound title or purchase of the print book.\* Delve into Medicare and Medicaid, veterans' benefits, guardianship and protective placement, and more with the foremost guide to elder law.



\*Attendees will receive information to access the free trial and discount via email after attending the program. 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

### Wispack Update 2022

Hear about the latest trends affecting Special Needs Trusts, the continuing impact of the SECURE Act on retirement assets, Medicare Set Aside Trusts, and more. Untangle the complex intersection between immigration benefits and means-tested benefits to help immigrant clients get the assistance they need. **7 CLE**

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

### Advising Older Clients and Their Families Vol. I

Written and reviewed by more than 60 of Wisconsin's top elder law attorneys, *Advising Older Clients* is the foremost guide to elder law for Wisconsin practitioners. In addition to substantive law citations, you'll find insights on protecting your clients' interests, fostering client relationships, and conducting client interviews.

Print Book: #AK0004; 542+ pp.; 5th ed. 2021-22; Member: \$276 | Nonmember: \$344.75  
Books UnBound Subscription: #AE0004\_SUB; Member: \$249 | Nonmember: \$311

### Elder Law Forms Library

Put high-quality forms, written by some of the most respected lawyers in the field, at your fingertips with the *Elder Law Forms Library*. This fully searchable library makes finding the right form a snap. Improve your accuracy with sample language documents, checklists, and more!

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

## Wispack Update 2023

Priority Code: S 4 1 9 3 B

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<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
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### IN-PERSON SEMINAR:

Friday, April 28, 2023 –  
Madison

### LIVE WEBCAST:

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**Mail to:** State Bar PINNACLE Registrations  
P.O. Box 7158  
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Event Code: CA3471 M W R R2 R3 R4 R5 R6 R7 R8