



Legal Issues of the Aging 2023

Program dates start September 22. Register today!

6.5 CREDIT HOURS:

- 5.5 CLE credit hours
- 1 LAU credit hour

Legal Issues of the Aging 2023

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

Your elder law practice, elevated

With roughly 10,000 Baby Boomers turning 65 every day,¹ older Americans are making plans for their future medical and financial needs today. Be ready to assist them by getting up to speed on key legal and financial concerns at **Legal Issues of the Aging 2023**.

Help clients steer clear of benefits disruptions now that the Public Health Emergency has ended. Discover strategies for working with (or avoiding) Medicaid Estate Recovery and hear updates on irrevocable trusts for Medicaid planning. You'll also receive tips on making your practice more accessible for clients and staff.

How you'll benefit:

- Understand the role of marital property agreements in estate planning
- Learn best practices for handling cases involving Medicaid Estate Recovery
- Assess the status of key elder law concerns after the Public Health Emergency
- Create a practice that's more inclusive for your clients and staff
- Get your essential case law and legislative update

Who should attend:

- Elder law practitioners
- Guardians ad litem for adults
- Estate planning and probate lawyers
- Disability rights lawyers
- Public interest lawyers

Legal Issues of the Aging 2023 provides guidance you can rely on to keep your elder law practice moving in the right direction.

Register today!

1. <http://www.pewresearch.org/fact-tank/2010/12/29/baby-boomers-retire/>

Schedule

8:00 AM Registration

8:30 AM Case Case Law and Legislative Update

Amy K. Greske, Tiara Oates

9:20 AM Planning with Marital Property Agreements

- Practice tips
 - Avoiding Estate Recovery
- Reg P. Wydeven*

10:20 AM Break

10:35 AM Best Practices for Working with Medicaid Estate Recovery

- Requirements for working with estate recovery when your client and/or their spouse passes away
 - How marital property agreements and summary settlements can reduce liability for estate recovery for married clients
 - Communicating with DHS estate recovery—what works best at each step of the process
 - Framing client expectations about the process and potential delays
 - Rules and timeframes for requesting a hardship waiver; exceptions to estate recovery
- Anthony Davenport, Jon Fischer, Michelle Kocovsky, Kate Schilling, Reg P. Wydeven*

12:00 PM 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

1:00 PM Income Tax Considerations for Irrevocable Trusts Used in Medicaid Eligibility Planning

- The various income tax considerations that the elder law and/or estate planning attorney must take into account when drafting an irrevocable trust
 - How Revenue Ruling 2023-2 and many other income tax rules and concepts pertaining to irrevocable trusts
- Mark D. Munson*

1:50 PM Creating an Accessible and Inclusive Practice

- Obligations and ADA guidelines
 - Best practices when client has physical, learning, or language barriers
- Amy M. Burger, Hamza Jaka*

3:00 PM Break

3:15 PM An Update Following the End of the Public Health Emergency

- A look at how the unwinding is going four months after the PHE ended
- Ryan Long, Kate Schilling*

4:05 PM Program Concludes

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

Faculty

Program Chair

Meghan McAllister Teigen

Johnson Teigen LLC, Fitchburg

Presenters

Amy M. Burger

Law Office of Attorney Amy M. Burger,
Hubertus

Anthony Davenport

Estate Recovery Section, Department of
Health Services, Madison

Jon Fischer

McCarty Law LLP, Appleton

Amy K. Greske

O'Neill Elder Law LLC, Hudson

Hamza Jaka

Gardiner Koch Weisberg & Wrona, Lake
Geneva

Michelle Kocovsky

Estate Recovery Section, Department of
Health Services, Madison

Ryan Long

Sturgul & Long, S.C., Hurley

Mark D. Munson

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

Tiara Oates

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

Kate Schilling

Greater Wisconsin Agency on Aging
Resources, Madison

Reg P. Wydeven

McCarty Law LLP, Appleton

Dates / Location

In-Person Seminar – Madison

Friday, September 22, 2023

State Bar Center

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

Live Webcast

Friday, September 22, 2023

Webcast Replay

Monday, October 2, 2023

Wednesday, October 11, 2023

Thursday, October 19, 2023

Tuesday, October 24, 2023

Thursday, November 2, 2023

Friday, November 10, 2023

Saturday, November 18, 2023

Wednesday, November 22, 2023

Credits

This program has been submitted to the Wisconsin Board of Bar Examiners for up to **6.5 credit hours** consisting of:

- **5.5 CLE credit hours**
- **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 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: Complete and current safety guidelines can be found at wisbar.org/covidsafety.



The Elder Law and Special Needs Section is pleased to offer five scholarships for Section members to attend the in-person or live webcast presentation of *Legal Issues of the Aging 2023* on **September 22, 2023**. For scholarship qualifications and application information, visit wisbar.org/LIAScholarship. Deadline to apply is August 25, 2023. **Questions?** Please contact Section Coordinator Kara Olson at kolson@wisbar.org.

This program is sponsored by:



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Attendees at the in-person seminar will have a special opportunity to meet and talk with presenters at a complimentary luncheon sponsored by the State Bar's Elder Law and Special Needs Section.

Book Bonus!

Advising Older Clients & Their Families Vol. II

Seminar attendees **SAVE 15%** on *Advising Older Clients & Their Families Vol. II*. * Written by more than 60 of Wisconsin's premier elder law attorneys, it's the foremost guide to elder law specifically designed for Wisconsin practitioners.



* Attendees will receive information to access the 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

CLE Seminars | CLE OnDemand™

Wispect Update 2023

Experienced practitioners and trust professionals from across the U.S. will bring you up to speed on a wide range of topics every attorney working with Special Needs Trusts (SNTs) should know. Learn more about structured settlements, annuities and trusts, as well as tax considerations and asset protection under SECURE 2.0 for wealthy clients. **7 CLE/1.5 EPR**

Webcast Replays: October 19, 2023 | November 28, 2023

CLE OnDemand: #CA3471D | **Member:** \$269 | **Nonmember:** \$349

Books / Books UnBound® | Online Fillable Forms

Advising Older Clients & 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:** \$275 | **Nonmember:** \$344.75

Books UnBound Subscription: #AE0004_SUB; **Member:** \$249 | **Nonmember:** \$311

Elder Law Forms Library

The *Elder Law Forms Library* puts easily searchable, high-quality forms to help simplify your practice at your fingertips 24/7. Don't spend any more time searching for that ONE form you saved in a place you were sure you'd remember. Save yourself the hassle and subscribe to the *Elder Law Forms Library*!

Online subscription: #FSFB6000 | **Members only:** \$105/year
(Discounts available on multi-user subscriptions.)

Legal Issues of the Aging 2023

Priority Code: S 4 2 5 5 B

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<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:

Fri., Sept. 22, 2023 –
Madison

WEBCAST REPLAYS:

Mon., Oct. 2, 2023
 Weds., Oct. 11, 2023
 Thurs., Oct. 19, 2023
 Tues., Oct. 24, 2023

Thurs., Nov. 2, 2023
 Fri., Nov. 10, 2023
 Sat., Nov. 18, 2023
 Weds., Nov. 22, 2023

LIVE WEBCAST:

Fri., Sept. 22, 2023

Lawyer State Bar Member No. _____

Nonlawyer Profession _____

Name _____

Firm Name _____

Address _____

City/State/Zip _____

Phone Number _____

Email _____

PAYMENT: Tuition Amount Enclosed \$ _____

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Event Code: CA3512M WR R2 R3 R4 R5 R6 R7 R8