



An Introduction to Elder Law

Program dates start March 14. Register today!

**6 CLE
1 EPR**

An Introduction to Elder Law

Endorsed by the State Bar of Wisconsin's Elder Law Section and Young Lawyers Division

Aging wisely

Finances, health, estate planning, decision-making authority – getting older means plenty of planning for the future. If you're starting an elder law practice or you're an experienced practitioner looking to polish your skills, find trusted guidance on the fundamentals at **An Introduction to Elder Law**. You'll discover effective planning techniques using assets, divestments, promissory notes and trusts, and more. Plus, explore solutions to ethical questions in elder law practice using hypothetical illustrations.

How you'll benefit:

- Receive solid grounding in elder law's essential elements
- Become familiar with medical assistance programs for the elderly
- Understand health care power of attorney and other life planning options
- Find out how guardianships and protective placements work
- Learn planning strategies under the Wisconsin Trust Code
- Explore tactics for estate recovery

Who should attend:

- Attorneys who want to add elder law to their practice
- Estate planning and probate lawyers
- Guardians ad Litem for adults
- Family law practitioners
- Elder law attorneys seeking a refresher

Register today!

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.

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.

COVID-19 safety information:

Complete and current safety guidelines can be found at wisbar.org/covidsafety.

Young lawyers save \$20!

PINNACLE knows that you're at the critical point in your career where you're developing your skills and practice, which is why Young Lawyers Division Members* receive \$20 off any of the Build Your Practice seminars.

**Young Lawyers Division Members: State Bar member attorneys 36 years of age or younger or within five years of admission to the State Bar of Wisconsin. If you've opted out of YLD, you will not receive this discount.*

This program is sponsored by:



Schedule

- 8:00 AM Registration**
- 8:30 AM Overview of Medical Assistance and Other Related Programs**
- Asset and income eligibility
 - Spousal impoverishment
 - Basic divestment
 - Community programs
- Margaret W. Hickey*
- 9:20 AM Durable Power of Attorney**
- Role of legal counsel
 - Choice of agents
 - Springing or non-springing power
 - Gifting provisions
 - Other special provisions
- Dayna J. Lefebvre*
- 9:45 AM Health Care Power of Attorney**
- Execution
 - Special provisions – “Living Will” statement
 - Considering religious influences
 - Considering present illness or diagnosis
 - Do Not Resuscitate orders
- Jessica A. Liebau*
- 10:15 AM Break**
- 10:30 AM Guardianship and Protective Placement**
- Guardianship and protective placement procedures
 - Who may petition for guardianship
 - Requirements for transfer to a nursing home under the Family Consent Act
 - Post appointment pitfalls
 - General strategies for handling contentious cases
- Kate Schilling*
- 11:15 AM Elder Law Case Study: Basic Planning Techniques**
- Unavailable assets and purchase of exempt assets
 - Divestment planning
 - Use of promissory notes and trusts
 - Maximizing resources for the community spouse
 - Estate planning issues
- Devin M. Stasek*

- 12:00 PM Lunch (on your own)**
- 1:00 PM Estate Recovery**
- Liens against the home
 - Recovery from probate estate
 - Non-probate recovery
 - Act 20 and UTC changes
- Dayna J. Lefebvre*
- 2:00 PM Ethics**
- Ethics of elder law practice
 - Hypotheticals
- Margaret W. Hickey, Carol J. Wessels*
- 2:50 PM Question and Answer**
- 3:00 PM Program Concludes**

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

Dates

Location

In-Person Seminar

Thursday, March 14, 2024
State Bar Center
5302 Eastpark Blvd.
Madison, WI
(608) 257-3838

Webcast Seminar

Thursday, March 14, 2024

Webcast Replay

Tuesday, March 26, 2024
Wednesday, April 3, 2024
Friday, April 12, 2024
Monday, April 22, 2024
Thursday, May 16, 2024
Tuesday, May 28, 2024
Friday, September 13, 2024
Wednesday, October 23, 2024

Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for up to **6 CLE credits including 1 Ethics and Professional Responsibility credit.**

Faculty

Program Chair & Presenter

Margaret W. Hickey

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

Presenters

Dayna J. Lefebvre

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

Jessica A. Liebau

Wessels & Liebau LLC, Mequon

Kate Schilling

Greater Wisconsin Agency on Aging Resources, Madison

Devin M. Stasek

Foley, Shannon, Powers & Rusch, S.C., Racine

Carol J. Wessels

Wessels & Liebau LLC, Mequon



About the Build Your Practice Series

The Build Your Practice Series

from State Bar of Wisconsin PINNACLE® introduces you to the fundamentals of various practice areas. Gain the tools and information you need to develop a new area of practice and expand your firm's offerings. Build Your Practice Series programs are endorsed by the State Bar's Young Lawyers Division.

Book Bonus!

Advising Older Clients and Their Families

SAVE 15% on *Advising Older Clients and Their Families – two-volume set*.^{*} Written and reviewed by more than 20 of Wisconsin’s premier elder law attorneys, it’s the foremost guide to elder law, specifically developed for Wisconsin practitioners. Use **discount code CA3609** when you order online or by calling (800) 728-7788.



^{*}Discount applies to both print and digital Books UnBound editions of this title and cannot be applied to previous purchases. Offer valid through 12/31/25. For Books UnBound users, discount may be applied to purchase of individual Books UnBound title only and may not be used on purchase of libraries. Discount cannot be combined with any other offers.

Additional Learning Opportunities

CLE Seminars

The ABC’s of Basic Long-Term Care Planning

Provide informed, effective guidance to clients about planning for long-term care costs. Pick up strategies for initiating long-term care conversations with clients. Learn how to create personalized long-term care plans that align with your clients’ goals and protect their financial assets. **2 CLE**

Webcast Seminar: February 3, 2024 | February 6, 2024

Books / Books UnBound®

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

Gain a better understanding of the intersection between mental health issues and the law with this comprehensive resource that covers a range of topics such as guardianships, competency, benefits for people with mental disabilities, and civil commitments.

Print Book: #AK0440E01; 344+ pp.; 1st ed. 2020-21; **Member:** \$199 | **Nonmember:** \$219

Books UnBound® Subscription: #AE0440_SUB; **Member:** \$196 | **Nonmember:** \$245

Online Fillable Forms

Elder Law Forms Library

Make finding the forms you need in your practice a snap with the fully searchable *Elder Law Forms Library*. Experience access to customizable, up-to-date State Bar-exclusive forms, checklists, sample language, and more from wherever you have an internet connection.

Online Subscription: #FSFB6000; **Members Only:** \$105/year

Anytime. Anywhere. CLE OnDemand.™
wisbar.org/ondemand

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Priority Code: S 4 3 4 8 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
<input type="checkbox"/> YLD Member*	<input type="checkbox"/> \$219	<input type="checkbox"/> \$249
<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:

Thursday, March 14, 2024 – Madison

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LIVE WEBCAST:

Thursday, March 14, 2024

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) _____

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NOTICE: By attending this State Bar event, you understand and agree that you may be photographed and/or electronically recorded during the event and you hereby grant to the State Bar the right to use and distribute your name and likeness for promotional or educational purposes without monetary compensation. The State Bar assumes no liability for such use.

Mail to: State Bar PINNACLE Registrations
P.O. Box 7158
Madison, WI 53707-7158

Event Code: CA3609 M W R R2 R3 R4 R5 R6 R7 R8