



# Wispatch Update 2024

**Program dates start April 5. Register today!**

**7 CLE  
1 EPR**

# Wispact Update 2024

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

## An update you can trust

Aging clients and those with special needs depend on you to look out for their best interests and protect their eligibility for medical assistance and other benefit programs. **Wispact Update 2024** keeps you and your practice up to date on the latest developments and strategies for providing stability and flexibility for your clients. Come away with valuable insights from veteran elder law practitioners and trust professionals on the legal developments and updates crucial to your everyday practice.

## How you'll benefit:

- Understand the process for creating and administering a Wispact trust from start to finish
- Receive a thorough rundown of Social Security Administration basics and key issues
- Explore the latest case law on issues affecting elder and special needs clients
- Discover insights and understand important consideration regarding the SECURE 2.0 Act
- Pick up helpful tips for responsibly using communication tools with clients

## Who should attend:

- Adult guardians ad litem
- Estate planning attorneys
- Elder law attorneys
- Probate lawyers
- Family lawyers

**Register now!**

## Schedule

- 8:00 AM Registration**
- 8:30 AM Welcome and Overview of Wispact**  
*Kevin Hayde, Executive Director, Wispact, Inc.*
- 8:40 AM What You Need to Know About the Creation and Administration of a Wispact Trust**  
*Eric DeGroot, Jon Fischer, Emily Klunick, Kristi Papez, KC Watson, Reg P. Wydeven*
- 10:10 AM SECURE Act 2.0 Insights and Considerations**  
*Peter J. Wall*
- 11:00 AM Break**
- 11:15 AM Case Law Update**
- Recent regional and national cases involving Special Needs Trusts
  - Practice tips  
*Amy M. Burger, Mary C. Youssi*
- 11:45 AM Lunch (on your own)**
- 12:45 PM HUD & HOTMA Regulations and Impacts**  
*Roy W. Froemming*
- 1:35 PM Break**
- 1:50 PM Social Security Administration Basics and Issues**  
*Kate Schilling*
- 3:20 PM Ethically Utilizing Communication Tools and Resources**  
*Jeffrey S. Kause, Timothy J. Pierce, Heather B. Poster, Meghan M. Teigen*
- 4:10 PM Program Concludes**

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

## Be the Ultimate

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[wisbar.org/ultimatepass](https://wisbar.org/ultimatepass)



## Faculty

### Program Chairs & Presenters

**Kevin Hayde**

Wispact, Inc., Madison

**Kristi Papez**

Wispact, Inc., Madison

**Meghan M. Teigen**

Johnson Teigen LLC, Fitchburg

### Presenters

**Amy M. Burger**

The Law Office of Attorney Amy M. Burger, Hubertus

**Eric DeGroot**

Wispact, Inc., Madison

**Jon Fischer**

McCarty Law LLP, Appleton

**Roy W. Froemming**

Johnson Teigen LLC, Fitchburg

**Emily Klunick**

Wispact, Inc., Madison

**Jeffrey S. Krause**

Affinity Consulting Group, Waterford

**Timothy J. Pierce**

State Bar of Wisconsin, Madison

**Heather B. Poster**

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

**Kate Schilling**

Greater Wisconsin Agency on Aging Resources, Madison

**Peter J. Wall**

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

**KC Watson**

Wispact, Inc., Madison

**Reg P. Wydeven**

McCarty Law LLP, Appleton

**Mary C. Youssi**

Walny Legal Group LLC, Milwaukee

## Credits

This program will be submitted to the Wisconsin Board of Bar Examiners for **7 CLE credits including 1 Ethics and Professional Responsibility credit.**

## 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](https://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](https://wisbar.org/covidsafety).

## Dates Location

### In-Person Seminar

Friday, April 5, 2024

**State Bar Center**

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

### Live Webcast

Friday, April 5, 2024

### Webcast Replays

Monday, April 15, 2024

Wednesday, April 24, 2024

Tuesday, May 7, 2024

Thursday, May 16, 2024

Friday, May 24, 2024

Wednesday, June 5, 2024

Thursday, June 13, 2024

Tuesday, July 2, 2024

Thursday, October 10, 2024

Tuesday, November 19, 2024

*This program is sponsored by:*



### *What is Wispact?*

**Wisconsin Pooled & Community Trusts, Inc. (Wispact)** 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. Wispact, Inc., a Wisconsin nonprofit corporation, establishes and manages the trusts.

**Book Bonus!**

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

**SAVE 15%** on *Advising Older Clients & Their Families Vol. I*.  
Written and reviewed by more than 60 of Wisconsin's premier elder law attorneys, it's the foremost guide to elder law, specifically developed for Wisconsin practitioners. Use **discount code CA3615** 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

#### An Introduction to Elder Law 2024

Develop a solid understanding of elder law fundamentals. Find out how guardianships and protective placements work, become familiar with medical assistance programs, explore estate recovery strategies, and learn planning strategies under the Wisconsin Trust Code. **6 CLE/1 EPR**

**In-Person Madison Seminar and Live Webcast:** Mar. 14, 2024  
**Webcast Replays:** Mar. 26, 2024 | Apr. 3, 2024 | Apr. 12, 2024 | Apr. 22, 2024 | May 16, 2024  
May 28, 2024 | Sept. 13, 2024 | Oct. 23, 2024

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

This insightful overview of elder law in Wisconsin is the perfect guide to turn to for answers to your questions about representing aging clients. Find practice pointers, charts, forms, and other essentials to help you build and maintain a successful elder law practice.

**Print Book:** #AK0005; 748+ pp.; 5th ed.; 2022-23; **Member:** \$275 | **Nonmember:** \$345  
**Books UnBound Subscription:** #AE0005\_SUB; **Member:** \$249 | **Nonmember:** \$311

#### Elder Law Forms Library

Gain quick online access to a full library of elder law forms written by some of the most respected attorneys in the field with the *Elder Law Forms Library*. Streamline your practice with easy-to-find forms, sample language, checklists, and more!

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

## Wispect Update 2024

**Priority Code: S4346B**

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#### IN-PERSON SEMINAR:

Friday, April 5, 2024 –  
Madison

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- Tuesday, July 2, 2024
- Thursday, October 10, 2024
- Tuesday, November 19, 2024

#### LIVE WEBCAST:

Friday, April 5, 2024

Lawyer      State Bar Member No. \_\_\_\_\_

Nonlawyer      Profession \_\_\_\_\_

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Firm Name \_\_\_\_\_

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