



STATE BAR
OF WISCONSIN

P.O. Box 7158, Madison, WI 53707-7158

Legal Issues of the Aging 2024

CREDIT HOURS: 6.5 CLE credits including 1.5 EPR credit

IN-PERSON SEMINAR: Friday, September 20, 2024 – Madison

LIVE WEBCAST: Friday, September 20, 2024

WEBCAST REPLAYS: Friday, September 27, 2024
Monday, September 30, 2024
Thursday, October 10, 2024
Wednesday, October 16, 2024
Tuesday, October 29, 2024
Friday, November 15, 2024
Saturday, December 7, 2024
Monday, December 16, 2024
Friday, December 27, 2024
Thursday, January 9, 2025
Tuesday, January 21, 2025
Wednesday, January 29, 2025



STATE BAR OF WISCONSIN
PINNACLE

Legal Issues of the Aging 2024



6.5 CLE | 1.5 EPR

Program dates start September 20.
Register today!

Legal Issues of the Aging 2024



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

Elder law, elevated

Catch up on crucial legal, financial, ethical, and legislative developments impacting older clients at **Legal Issues of the Aging 2024**. Experienced practitioners will break down what you need to know about the new Uniform Trust Decanting Act, including important terminology, the process for trust decanting, and various situations for decanting. You'll also review your ethical responsibilities when it comes to working with clients and their families.

HOW YOU'LL BENEFIT

- Gain insight into recent fair hearing decisions and case law
- Learn what legislation didn't pass and what to watch for
- Explore current topics in Medicaid
- Receive an update on Wisconsin's Uniform Trust Decanting Act
- Know how to address confidentiality, capacity, and conflicts of interest in guardianship and estate planning

Stay current on the best ways to help aging clients with the trusted guidance you've come to expect from *Legal Issues of the Aging 2024*.

Register now!

SCHEDULE

8:00 AM Registration

8:30 AM Fair Hearing Decisions and Case Law Update

- Notable fair hearing decisions published this year
- Recent case law and MEH updates
Amy M. Burger, Benjamin S. Wright

9:20 AM What Didn't Pass in Legislation and What to Watch

Bruce A. Tammi, Victoria L. Davis Davila

10:15 AM Break

10:30 AM Current Topics in Medicaid

Margaret Wrenn Hickey, Heather B. Poster

12:00 PM Networking Lunch (Madison In-Person Presentation)

Attend the in-person seminar for a special opportunity to meet and chat with presenters and fellow attendees at a complimentary luncheon sponsored by the **State Bar's Elder Law and Special Needs Section**.



1:00 PM Wisconsin's Uniform Trust Decanting Act: An Update on the New Law

- Terminology of the new law
- Various situations for decanting
- Explore the process for trust decanting
- Compare decanting with other options for modifying trusts
Mark T. Johnson

1:55 PM Confidentiality, Capacity, and Conflicts of Interest in Guardianship and Estate Planning

Moderator: *Jessica A. Liebau*

Panel: *Jessica Schober Braun, Sara K. Micheletti, Blaine Patino*

3:15 PM Program Concludes

Following start time, schedule will vary slightly from above. All times are Central Time Zone.

FACULTY

PROGRAM CHAIR & PRESENTER

Jessica A. Liebau, Wessels & Liebau LLC, Mequon

PRESENTERS

Jessica Schober Braun, Schober Schober & Mitchell, S.C., New Berlin
Amy M. Burger, The Law Office of Attorney Amy M. Burger, Hubertus
Victoria L. Davis Davila, Davis & Pledl, S.C., Milwaukee
Margaret Wrenn Hickey, Becker, Hickey & Poster, S.C., Milwaukee
Mark T. Johnson, Johnson Teigen LLC, Fitchburg
Sara K. Micheletti, McCarty Law LLP, Appleton
Blaine Patino, Canellas & Patino LLC, Wauwatosa
Heather B. Poster, Becker, Hickey & Poster, S.C., Milwaukee
Bruce A. Tammi, Bruce A Tammi Law Office, Oconomowoc
Benjamin S. Wright, Wright Elder Law, New Richmond

DATES & LOCATION

IN-PERSON SEMINAR — MADISON

Friday, September 20, 2024
State Bar Center
5302 Eastpark Blvd., Madison, WI
(608) 257-3838

LIVE WEBCAST

Friday, September 20, 2024

WEBCAST REPLAYS

Friday, September 27, 2024
Monday, September 30, 2024
Thursday, October 10, 2024
Wednesday, October 16, 2024
Tuesday, October 29, 2024
Friday, November 15, 2024
Saturday, December 7, 2024
Monday, December 16, 2024
Friday, December 27, 2024
Thursday, January 9, 2025
Tuesday, January 21, 2025
Wednesday, January 29, 2025

CREDITS

CREDIT HOURS: 6.5 CLE credits, including 1.5 Ethics and Professional Responsibility credits*

* This program will be submitted to the Wisconsin Board of Bar Examiners for 6.5 CLE/1.5 EPR credits.

BOOK BONUS!

Advising Older Clients and Their Families

SAVE 15% on *Advising Older Clients & Their Families – Two-Volume Set*.* In it, you'll find the practice pointers, tips, charts, forms, and other tools to help you build and maintain a successful elder law practice. Use **discount code CA3669** when you order online or by calling (800) 728-7788.



PRINT BOOK: AK0187 **BOOKS UNBOUND:** AL0003_SUB

**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 the purchase of libraries. Discount cannot be combined with any other offers.*

This program is sponsored by:



LIFE NAVIGATORS
Your Disability Partner EST. 1949



Be the Ultimate

An **Ultimate Pass™** takes you beyond better with unlimited CLE for one annual fee. Three options available.

wisbar.org/ultimatepass

TUITION

	IN-PERSON	WEBCAST
State Bar Member	\$249	\$279
Nonmember	\$329	\$359
Ultimate Pass Gold/Silver	\$0	\$0
Ultimate Pass Bronze	\$249	\$0
Passbook Certificate	1 Certificate	1 Certificate

REGISTRATION & GENERAL INFO

ONLINE: wisbar.org/seminars

PHONE: (800) 728-7788

MAIL/FAX: Visit wisbar.org/regform
for registration form



PINNACLE PASSBOOK REGISTRATIONS: PINNACLE 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.

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

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

ACCOMMODATIONS: If you need special accommodations, please contact us at (800) 728-7788, ext. 6142 at least three weeks prior to the program date so we can make appropriate arrangements.

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.

Event Code: CA3669 Priority Code: S4416B

ADDITIONAL LEARNING OPPORTUNITIES

Wispect Update 2024

Designed especially for those representing elder or disabled clients, *Wispect Update 2024* is packed with insights on the latest developments on special needs trust, the SECURE 2.0 Act, Wispect trusts, Social Security Administration essentials, and resources for communicating with clients. **7 CLE | 1 EPR**



EVENT CODE: CA3615 | **WEBCAST REPLAY:** OCT. 10, 2024 | NOV. 19, 2024



Wisconsin Trust Code and Powers of Appointment Act

Put the latest version of the Wisconsin Trust Code at your fingertips, including the most recent changes to trust administration, decanting, powers of appointment, and more. This resource compiles everything you need to understand updates to the Trust Code in one handy volume.

PRINT BOOK: AK0418E25

Elder Law Forms Library

Access a wide range of exclusive State Bar of Wisconsin PINNACLE® forms in minutes with the *Elder Law Forms Library*. This fully searchable library makes finding the form you need quick and easy. Save time and avoid the endless search for that one form you need with a subscription to the *Elder Law Forms Library*.



MEMBERS ONLY – ONLINE SUBSCRIPTION: FSFB6000

The **Elder Law and Special Needs Section** is pleased to offer five scholarships to attend the *Legal*

scholarships

Issues of the Aging 2024 in-person presentation on September 20, 2024. Find more information on scholarship eligibility and the application at wisbar.org/LIAScholarship. **Deadline to apply is Friday, August 23, 2024.** **Questions?** Please contact Section Coordinator Kara Olson by email at kolson@wisbar.org.