



STATE BAR
OF WISCONSIN

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

Wispect Update 2025

CREDIT HOURS: 4 CLE credits

IN-PERSON SEMINAR: Friday, April 25, 2025 –
Madison

LIVE WEBCAST: Friday, April 25, 2025

WEBCAST REPLAYS:
Friday, May 2, 2025
Thursday, May 8, 2025
Wednesday, May 14, 2025
Tuesday, May 20, 2025
Monday, May 26, 2025
Monday, June 2, 2025
Thursday, June 12, 2025
Wednesday, June 18, 2025
Monday, June 30, 2025
Friday, September 5, 2025
Monday, October 13, 2025



STATE BAR OF WISCONSIN
PINNACLE

Wispect Update 2025



4 CLE

Program dates start April 25.
Register today!

Wispect Update 2025



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

Make it count for your clients

Wispect Update 2025 provides reliable insights to help you keep up with key developments impacting aging clients and individuals with special needs. This half-day program delivers essential updates, on-point analysis, and best practices to help your clients maintain eligibility for public benefits. Survey national trends and receive helpful tips from seasoned practitioners to strengthen your Special Needs Trust (SNT) skills and provide life-long financial security strategies for your clients.

Register now!

HOW YOU'LL BENEFIT

- Understand the legal framework governing the creation and funding of special needs trusts (SNTs)
- Help clients appoint trustees who are well-prepared to manage an SNT effectively
- Hear how Wispect's practices align with guidelines from the National PLAN Alliance
- Gain the skills to coordinate lifetime planning strategies for parents of children with special needs
- Review case studies demonstrating successful ABLE account utilization
- Receive a case law update on new Medicaid Eligibility Handbook (MEH) rules and Fair Hearing decisions

SCHEDULE

8:00 AM Registration

8:30 AM Welcome and Overview of Wispect

Kevin Hayde

8:40 AM The Center Bankruptcy

- Overview of the "hows" and "whys" of the misappropriation of beneficiary assets by The Center for Special Needs Trust Administration, Inc. (The Center)
- Best practice guidelines from the National PLAN Alliance and how Wispect meets those guidelines
- The questions that should be asked of the trustee, administrator, etc. no matter who you would choose for the oversight of a beneficiary's assets

Kevin Hayde, Mark D. Munson

9:30 AM Special Needs Financial Planning

- The big picture: tying all elements of lifetime planning together for parents of children with special needs
- A decade in with ABLE accounts: developments in Wisconsin and nationally, as well as optimal usage case studies

Ryan McGuire

10:20 AM Break

10:35 AM Case Law Update

- New Medicaid Eligibility Handbook (MEH) rules
- Fair Hearing decisions

Blaine E. Patiño

11:25 AM Who Holds the Power: Creating and Funding Special Needs Trusts

- Overview of applicable law relating to who can create and fund special needs trusts
- Best practices for providing authority in estate planning documents
- Court procedures for obtaining authority related to special needs trusts

Jessica A. Liebau

12:15 PM Program Concludes

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

FACULTY

PROGRAM CHAIRS

Kevin Hayde, Wispact, Inc., Madison (*Also Presenting*)

Jessica A. Liebau, Wessels & Liebau LLC, Mequon (*Also Presenting*)

Kristi Papez, Wispact, Inc., Madison

Meghan M. Teigen, Johnson Teigen LLC, Fitchburg

PRESENTERS

Ryan McGuire, Oak Wealth Advisors, Madison

Mark D. Munson, Ruder Ware, L.L.S.C., Wausau

Blaine E. Patiño, Canellos & Patiño, LLC, Wauwatosa

DATES & LOCATION

IN-PERSON SEMINAR — MADISON

Friday, April 25, 2025

State Bar Center

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

LIVE WEBCAST

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CREDITS

CREDIT HOURS: 4 CLE credits*

*This program will be submitted to the Wisconsin Board of Bar Examiners for **4 CLE credits**. It does not qualify for EPR credit.

BOOK BONUS!

Advising Older Clients & Their Families — 2 Volume Set

SAVE 15% on *Advising Older Clients & Their Families – 2 Volume Set*. * Inside, you'll find the practice pointers, tips, charts, forms, and other tools essential to help you build and maintain a successful elder law practice Use **discount code CA3777** when you order online or by calling (800) 728-7788.

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



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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.

TUITION

	IN-PERSON	WEBCAST
State Bar Member	\$219	\$249
Nonmember	\$299	\$329
Ultimate Pass Gold/Silver	\$0	\$0
Ultimate Pass Bronze	\$219	\$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: CA3777 Priority Code: S4523B

ADDITIONAL LEARNING OPPORTUNITIES

Elder Financial Exploitation: A Practitioner's Guide

Financial exploitation is a common form of elder abuse in Wisconsin. Equip yourself to handle financial fraud cases and safeguard clients' assets in both civil and criminal proceedings. You'll gain perspective from corporate and defense counsel and receive practical tools for addressing elder financial abuse. **4 CLE**



CREDITS: 4 CLE | **CLE ONDEMAND:** CA3750D

Wisconsin Judicial Benchbook Vol. V.: Probate, Guardianship, and Mental Health



Written by judges and court commissioners, this *Benchbook* explains procedural options, the powers and duties of players involved, and the rights at issue in probate court and proceedings involving guardianships, protective placements, and mental health commitments.

PRINT BOOK: AK0029 | **BOOKS UNBOUND:** AE0029_SUB

Elder Law Forms Library

Streamline your practice with over 60 forms from our most popular elder law book titles. Quickly find the forms to efficiently manage retirement planning, guardianships, and long-term care cases in one organized cloud-based library.



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