



STATE BAR  
OF WISCONSIN

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

## Legal Issues of the Aging 2025

**CREDIT HOURS:** 7.5 CLE credits

**IN-PERSON SEMINAR:** Friday, September 19, 2025

**LIVE WEBCAST:** Friday, September 19, 2025

**WEBCAST REPLAYS:** Monday, September 29, 2025  
Tuesday, October 7, 2025  
Saturday, October 18, 2025  
Wednesday, October 22, 2025  
Thursday, October 30, 2025  
Friday, November 7, 2025  
Monday, November 17, 2025  
Tuesday, November 25, 2025  
Wednesday, December 3, 2025  
Monday, December 22, 2025  
Wednesday, December 31, 2025  
Thursday, January 15, 2026  
Tuesday, January 27, 2026



STATE BAR OF WISCONSIN  
PINNACLE

# Legal Issues of the Aging 2025



7.5 CLE

Program dates start September 19.  
Register today!

# Legal Issues of the Aging 2025

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

## Plan, advise, and support

Older clients and their families often face a complex array of legal, financial, and caregiving decisions, particularly as care needs evolve and benefit rules change. **Legal Issues of the Aging 2025** offers practice-ready insight into the evolving challenges of elder and special needs law, including care planning, Medicaid, Supplemental Security Income (SSI), and recent legislative updates. Unpack emerging ownership trends in assisted living facilities, review licensing issues, and discuss payment concerns. You'll come away with practical strategies to support clients facing the legal realities of aging, disability, and long-term care. **Register today!**

### HOW YOU'LL BENEFIT

- Reduce risk when advising clients on assisted living entry, care arrangements, and disputes
- Stay ahead of legal and policy changes that impact elder and special needs planning
- Know when and how to use pooled versus private special needs trusts
- Integrate recent case law and Department of Health Services guidance into your client strategies
- Represent clients more effectively in fair hearings and public benefit matters

## SCHEDULE

### 8:00 AM Registration

### 8:30 AM Where the Rubber Meets the Road — A Panel Discussion with the Facility and Elder Law Perspective

- Legal trends shaping assisted living mergers and acquisitions by private equity or family-owned buyers
- Navigating key regulatory challenges — from licensing issues to drafting admissions agreements
- Managing high-risk situations like involuntary discharges and private pay timelines

**Moderator:** Jon Fischer **Panel:** Robert J. Lightfoot, Bridget M. Erwin

### 9:45 AM 'We'll Take Care of You No Matter What' and Other Tall Tales

**Moderator:** Jessica A. Liebau; **Panel:** Jessica A. Braun, Blaine Patiño

### 11:00 AM Break

### 11:15 AM Public Benefits Update

Amanda K. Grady

### 12:30 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**.



### 1:30 PM Fair Hearing How To

- When and why you should file for a fair hearing
  - How to prepare for the fair hearing
  - Presentation of evidence at the fair hearing
  - Pros and cons of settlement before hearing
  - Supplementing the record
  - Petitioning for attorney's fees and costs after a favorable decision
- Margaret W. Hickey, Heather B. Poster*

### 2:45 PM Break

### 3:00 AM Case Law Update

- New legislation
- New case law
- New DHS memos
- New fair hearing decisions

*Katrina Hochholzer, Sara K. Micheletti*

### 4:15 PM Program Concludes

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

## FACULTY

### PROGRAM PRESENTERS

**Jessica A. Braun**, Schober Schober & Mitchell, S.C., New Berlin  
**Bridget M. Erwin**, Hager, Dewick & Zuengler, S.C., Green Bay  
**Jon Fischer**, McCarty Law LLP, Appleton  
**Amanda K. Grady**, Greater Wisconsin Agency on Aging Resources, Inc., Madison  
**Margaret W. Hickey**, Becker, Hickey & Poster, S.C., Milwaukee  
**Katrina Hochholzer**, McCarty Law LLP, Appleton  
**Jessica A. Liebau**, Wessels & Liebau LLC, Mequon  
**Robert J. Lightfoot**, Reinhart Boerner Van Deuren, S.C., Madison  
**Sara K. Micheletti**, McCarty Law LLP, Appleton  
**Blaine Patiño**, Canellos & Patino LLC, Wauwatosa  
**Heather B. Poster**, Becker, Hickey & Poster, S.C., Milwaukee

## CREDITS

**CREDIT HOURS:** This program will be submitted to the Wisconsin Board of Bar Examiners for **7.5 CLE credits**. It does not qualify for EPR credit.

## DATES & LOCATION

### IN-PERSON SEMINAR — MADISON

Friday, September 19, 2025  
**State Bar Center**  
5302 Eastpark Blvd.  
Madison, WI  
(608) 257-3838

### LIVE WEBCAST

Friday, September 19, 2025

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## 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 CA3806** 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 12/31/26. 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.

The **Elder Law and Special**

**Needs Section** is pleased to offer

**scholarships**

five scholarships to attend the *Legal Issues of the Aging 2025* in-person presentation on September 19, 2025 in Madison.

Find more information on scholarship eligibility and the application at **wisbar.org/LIAScholarship**. **Deadline to apply is Friday, August 22.** **Questions?** Please contact Section Coordinator Kara Olson by email at [kolson@wisbar.org](mailto:kolson@wisbar.org).

## PROGRAM SPONSORS



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## TUITION

	IN-PERSON	WEBCAST
State Bar Member	\$259	\$289
Nonmember	\$339	\$369
Ultimate Pass Gold/Silver	\$0	\$0
Ultimate Pass Bronze	\$259	\$0
Passbook Certificate	1 Certificate	1 Certificate

## REGISTRATION & GENERAL INFO

**ONLINE:** [wisbar.org/seminars](https://wisbar.org/seminars)

**PHONE:** (800) 728-7788

**MAIL/FAX:** Visit [wisbar.org/regform](https://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](https://wisbar.org) up to two days prior to and 90 days after your seminar.

**CANCELLATIONS:** Please visit [wisbar.org/cancellations](https://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: CA3806 Priority Code: S4622B

## ADDITIONAL LEARNING OPPORTUNITIES

### Wispect Update 2025

Receive timely insights and trusted guidance on planning strategies and benefit eligibility for aging clients and individuals with special needs. You'll explore fiduciary lessons from recent misconduct cases, financial planning best practices, and the latest on the status of a state-sponsored ABLE program in Wisconsin.



**CREDITS:** 4 CLE | **WEBCAST REPLAY:** SEPT. 5, 2025 | OCT. 13, 2025



### Guardianship and Protective Placement for Older Adults in Wisconsin

This comprehensive guide to the statutes, procedures, and practical considerations involved in guardianship and protective placement matters breaks down complex concepts into accessible language. Designed for clarity and usability, it includes checklists to keep you on track and practical tips to help you manage cases effectively.

**PRINT BOOK:** AK0201 | **BOOKS UNBOUND:** AE0201\_SUB

### Elder Law Forms Library

Gain instant access to over 60 customizable forms for retirement planning, guardianships, long-term care, and more. Drawn from trusted PINNACLE® resources, the library helps you save time, stay compliant, and serve your clients more efficiently.



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