STATE BAR OF WISCONSIN
P.O. Box 7158, Madison, WI 53707-7158

Wispact Update 2026

CREDIT HOURS: 6 CLE | 1 EPR credits

IN-PERSON SEMINAR: Friday, April 17, 2026

LIVE WEBCAST: Friday, April 17, 2026

WEBCAST REPLAYS:
Friday, April 24, 2026
Tuesday, April 28, 2026
Wednesday, May 6, 2026
Saturday, May 9, 2026
Thursday, May 14, 2026
Monday, May 18, 2026
Wednesday, May 27, 2026
Wednesday, June 3, 2026
Thursday, June 11, 2026
Tuesday, June 30, 2026
Thursday, September 3, 2026
Monday, October 5, 2026

STATE BAR OF WISCONSIN
PINNACLE

Wispact Update 2026

6 CLE | 1 EPR

Program dates start April 17.
Register today!

Wispact Update 2026

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

Become a Wispact wiz

Wispact Update 2026 keeps you and your practice up to date with the latest strategies for providing stability and flexibility for aging clients and individuals with special needs who receive public benefits. Track recent shifts in fair hearing decisions, case law, and the Medicaid Eligibility Handbook (MEH) that affect eligibility and trust administration. Take a closer look at pooled trust practices, distribution strategies, and the role of Achieving a Better Life Experience (ABLE) accounts. You'll also follow a longitudinal family case study to examine supported decision-making and its potential outcomes.

HOW YOU'LL BENEFIT

- Identify potential red flags related to assets, capacity, and family roles before they complicate plans
- Make more confident calls when clients propose funding trusts with complex or unusual property
- Avoid common application and distribution errors by implementing Wispact best practices and guidance on processes
- Provide more nuanced advice when clients ask whether a pooled trust, an ABLE account, or both are appropriate for their situation
- Recognize when supported decision-making may help preserve autonomy without sacrificing protection
- Spot and address ethics issues in cases where capacity, guardians, and multiple interested parties are involved
- Position yourself as an attorney who understands not just the rules, but how the system works in practice

Make sure your clients have the resources they need while remaining eligible for public benefits with help from *Wispact Update 2026*. **Register today!**

DATES & LOCATION

IN-PERSON SEMINAR — MADISON

Friday, April 17, 2026
State Bar Center
5302 Eastpark Blvd.
Madison, WI

LIVE WEBCAST

Friday, April 17, 2026

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CREDITS

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

This program is sponsored by:

Wispact

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.

SCHEDULE

8:00 AM **Registration**

8:30 AM **Welcome and Overview of Wispact**
Kevin Hayde

8:45 AM **Unique Assets and the Wispact Unique Asset Policy**
- Purpose of pooled special needs trusts (PSNTs)
- Preservation of assets and public benefits
- Compliance with Medicaid, SSI, and related regulations
- Collaboration with beneficiaries, families, attorneys, and advisors
- Evaluation, valuation, and risk assessment of unique assets
- Trustee responsibilities and management challenges

Peter J. Wall, Kevin Hayde

9:35 AM **Fair Hearing Decisions and Case Law Update**
- Notable fair hearing decisions from the past year
- Recent case law developments and MEH updates

Alicia Ratajczak, Benjamin Scott Wright

10:25 AM **Break**

10:40 AM **ABLE Accounts: Basics and Updates**
- Overview of ABLE accounts in special needs planning
- Eligibility requirements and qualified beneficiaries
- Program benefits, limitations, and compliance issues
- Recent ABLE account updates
- Practical use of ABLE funds to enhance quality of life
- Coordination with special needs trusts and trustee strategies

Peter J. Wall

11:30 AM **Wispact Processes and Best Practices**
- Handling difficult distributions
- Common application errors

Emily Klunick, Kristi L. Papez, Lindsey Schilling

12:20 PM **Lunch (on your own)**

1:20 PM **Rethinking Capacity and Consent: Supported Decision-Making in Practice — One Family's Journey Beyond Guardianship**
- Supported Decision-Making as an alternative to guardianship
- Longitudinal family case study
- Capacity development through experience and risk-taking
- Long-term outcomes beyond representation
- Expansion of self-determination over time

Mary Ceretti

2:15 PM **Break**

2:30 PM **Ethics**
- Capacity to create a first-party Wispact Trust — what's required for capacity and what do we do when a prospective client has a guardian of the person but no guardian of the estate: SCR 20:1.14 – Client with Diminished Capacity
- Confidentiality and navigating multiple client relationships when a third-party Wispact Trust for a disabled individual dovetails into a first-party Wispact Trust for that same individual who has capacity: SCR 20:1.7 – Conflict of Interest Current Clients, SCR 20:1.6 – Confidentiality
- Communication challenges and accommodations — what's expected of us as attorneys? SCR:1.4 – Communication

Bridget M. Erwin, Hamza Jaka

3:20 PM **Program Concludes**

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

FACULTY

PROGRAM CHAIRS

Jon Fischer, McCarty Law LLP, Appleton
Kevin Hayde (Also presenting), Wispact, Inc., Madison
Kristi L. Papez (Also presenting), Wispact, Inc., Madison
K.C. Watson, Wispact, Inc., Madison

PRESENTERS

Mary Ceretti, Disability Rights Wisconsin, Milwaukee
Bridget M. Erwin, Hager Dewick & Zuengler, S.C., Green Bay
Hamza Jaka, Gardiner Koch Weisberg & Wrona, Lake Geneva
Emily Klunick, Wispact, Inc., Madison
Alicia Ratajczak, McCarty Law LLP, Appleton
Lindsey Schilling, Wispact, Inc., Madison
Peter J. Wall, True Link Financial Advisors, LLC, Denver, CO
Benjamin Scott Wright, Wright Elder Law, New Richmond

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**
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 *my*StateBar on wisbar.org up to two days prior to and 90 days after your seminar.

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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.

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Event Code: CA3950 | **Priority Code:** S4712B

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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, charts, forms, and tools essential to building and maintaining a successful elder law practice. Use **discount code CA3950** 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 12/31/27. 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.*

ADDITIONAL LEARNING OPPORTUNITIES

Protecting Real Estate from Long-Term Care Costs

For many clients, a home is their most valuable asset, yet long-term care costs and Medicaid's five-year lookback can quickly put that property at risk. Receive tools for evaluating your clients' circumstances and practical guidance on safeguarding property within the constraints of Medicaid eligibility. **1 CLE**

Webcast Replays: March 13, 2026 | March 19, 2026 | March 25, 2026 | April 6, 2026

Wisconsin Elder and Disability Law Statutes 2026

If you advise older adults or individuals with disabilities, this concise compilation brings together the Wisconsin statutes you rely on most. Designed for quick answers, it pairs a streamlined format with an intuitive subject index, making it a go-to reference for everyday practice.

Print Book: AK0429E26

Elder Law Forms Library

This online library brings more than 60 customizable forms together in one place to help you handle retirement planning, guardianships, and long-term care cases more efficiently. With regularly updated templates and remote-notarization-ready forms, you'll spend less time chasing paper and more time focused on your clients.

Members Only — Online Subscription: FSFB6000