



STATE BAR
OF WISCONSIN

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

Legal Issues of the Aging 2026

CREDIT HOURS:

6.5 CLE credits including
1 EPR credit

IN-PERSON SEMINAR:

Friday, September 25, 2026

LIVE WEBCAST:

Friday, September 25, 2026

WEBCAST REPLAYS:

Monday, October 5, 2026
Tuesday, October 13, 2026
Monday, October 19, 2026
Wednesday, October 28, 2026
Thursday, November 5, 2026
Friday, November 13, 2026
Wednesday, November 18, 2026
Tuesday, December 1, 2026
Thursday, December 10, 2026
Thursday, December 31, 2026
Wednesday, January 20, 2027
Thursday, January 28, 2027



STATE BAR OF WISCONSIN
PINNACLE

Legal Issues of the Aging 2026



6.5 CLE | 1 EPR

Program dates start September 25.
Register today!

Legal Issues of the Aging 2026



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

Where elder law, public benefits, and real life intersect

Representing aging clients means keeping pace with a constantly changing mix of public benefits programs, planning tools, agency guidance, ethical obligations, and legal developments.

Legal Issues of the Aging 2026 provides a practical review of the issues elder law practitioners are addressing every day. This year's program covers fair hearing decisions, Family Care applications, Wisconsin Act 115, estate recovery developments, advanced care planning, and ethical considerations when representing clients with diminished capacity.

Join experienced practitioners, agency representatives, and elder law leaders for a day of practical guidance designed to help you better serve aging clients and their families. **Register now!**

HOW YOU'LL BENEFIT

- Understand recent fair hearing decisions and case law developments affecting aging clients
- Develop stronger strategies for handling Family Care applications, fair hearings, and public benefits advocacy
- Better navigate estate recovery issues, including common mistakes and emerging trends
- Strengthen your understanding of advanced care planning requirements and developments
- Address ethical challenges involving clients with diminished capacity
- Improve client counseling and long-term planning strategies for aging clients and their families

CREDITS

CREDIT HOURS: This program will be submitted to the Wisconsin Board of Bar Examiners for **6.5 CLE credits** including **1 Ethics** and **Responsibility credit**.

BOOK BONUS — SAVE 25%!

Advising Older Clients and Their Families

SAVE 25% on *Advising Older Clients & Their Families*.^{*} This comprehensive two-volume resource delivers practical guidance on elder law, estate planning, public benefits, incapacity planning, long-term care issues, and client counseling strategies. Use **discount code CA3981** 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 12/31/27. 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.

The **Elder Law and Special Needs Section** is pleased to offer

scholarships

five scholarships to attend the *Legal Issues of the Aging 2026* in-person presentation on September 25, 2026 in Madison. Find more information on scholarship eligibility and the application at **wisbar.org/LIAScholarship**. **Deadline to apply is Monday, August 24.** **Questions?** Please contact Section Coordinator Kara Olson by email at kolson@wisbar.org.

SCHEDULE

8:00 AM Registration

8:30 AM Fair Hearing Decisions and Case Law Update

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

Abbey K. Bowen, Polly Shoemaker

9:20 AM Wisconsin Act 115 and Advanced Care Planning

Avery J. Mayne

10:10 AM Break

10:25 AM Family Care Applications

- Attorney as the authorized representative
- MCO's refusal
- Tips for getting an application approved

Jessica A. Braun, Tammy Webler

11:15 AM Fair Hearing Requests

- What tactics work, and which don't
- What ALJ's are seeing

Kate J. Schilling

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 What is New in Estate Recovery

- Common mistakes in estate recovery submissions
- Family care capitation rates

Anthony P. Davenport

1:50 PM Break

2:05 PM Model Rule 1.14/ WI SCR 20:1.14

- Maintaining a "normal client relationship" with those with diminished capacity
- Substantial belief a client has diminished capacity and when to consult with others including a guardian ad litem

Dean R. Dietrich

2:55 PM Fair Hearing and Estate Recovery Nuts and Bolts

- Guided discussion of the day's content with practical questions and debate
 - Review of what practitioners are seeing and best practices
- Reg P. Wydeven*

3:45 PM Program Concludes

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

FACULTY

PROGRAM PRESENTERS

Abbey K. Bowen, Wessels & Liebau, LLC, Mequon

Jessica A. Braun, Schober, Schober & Mitchell, S.C., New Berlin

Anthony P. Davenport, Wisconsin Department of Health Services, Madison

Dean R. Dietrich, Weld Riley, S.C., Wausau

Avery J. Mayne, von Briesen & Roper, S.C., Milwaukee

Kate J. Schilling, ALJ, Division of Hearings and Appeals, Madison

Polly Shoemaker, Haskins, Main & Devine, LLC, Monona

Tammy Webler, Schober, Schober & Mitchell, S.C., New Berlin

Reg P. Wydeven, McCarty Law, LLP, Appleton

DATES & LOCATION

IN-PERSON SEMINAR — MADISON

Friday, September 25, 2026

State Bar Center

5302 Eastpark Blvd.

Madison, WI

(608) 257-3838

LIVE WEBCAST

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WEBCAST REPLAYS

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TUITION

	IN-PERSON	WEBCAST
State Bar Member	\$269	\$299
Nonmember	\$349	\$379
Ultimate Pass Gold/Silver	\$0	\$0
Ultimate Pass Bronze	\$269	\$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: CA3981 Priority Code: S4761B

ADDITIONAL LEARNING OPPORTUNITIES

Protecting Real Estate from Long-Term Care Costs

Long-term care expenses can quickly threaten a client's most valuable asset. Learn practical strategies for protecting real estate interests while navigating Medicaid eligibility rules, asset preservation planning, and long-term care considerations.



CREDITS: 1 CLE | **CLE ONDEMAND:** CA3916D



The Guardian ad Litem Handbook

Whether you're new to GAL appointments or a seasoned practitioner, *The Guardian ad Litem Handbook* provides practical guidance on duties, responsibilities, investigations, reports, and courtroom practice involving vulnerable adults and other protected individuals.

PRINT BOOK: AK0057 | **BOOKS UNBOUND:** AE0057_SUB

Elder Law Forms Library

Save time and improve efficiency with convenient access to a comprehensive collection of elder law forms and practice tools. Customize documents, streamline drafting, and find the forms you need with ease.



MEMBERS ONLY – ONLINE SUBSCRIPTION: FSFB6000

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