1ST ANNUAL

Elder Law Institute

SEPTEMBER 10–11, 2015 | PLYMOUTH

Serve the Expanding Needs of Your Clients Confidently

REGISTER TODAY
www.icle.org/elderlaw
877-229-4350
Serve the Expanding Needs of Your Clients Confidently

Gain the tools you need to become successful in this growing practice area and avoid giving away business your aging clients are bringing to you. Get grounded in both core and evolving issues in elder law like protective orders, caregiver agreements, long-term care insurance, government benefits, housing options, tax issues, and special needs trusts. Michigan’s most respected experts provide answers to the most complex issues to make it easy and profitable to meet the demand from this growing client base.

Become More Effective and Efficient
Answer the recurring questions of the elder client more effectively while relating to them on a whole new level. Improve your ability to advocate and serve the growing needs of your aging clients.

Leave with a Roadmap
Gain a clear and simple overview of government benefits that can improve the quality of life for older clients. Walk away knowing that you can recognize and respond to your clients’ needs.

Learn From the Best
Probate judges, long-term care specialists, gerontologists, service providers, mediators and experienced elder law and special needs lawyers give strategies for working with senior clients.

Avoid Pitfalls and Missed Opportunities
Acquire the tools and resources to navigate through thorny issues and stay on top of the latest developments and planning strategies.

Definitive Drafting Advice
Improve your drafting of essential documents like durable powers of attorney, special needs trusts, and caregiver agreements.

Already Experienced in Elder Law Practice?
No matter how long you’ve been practicing elder law, you will benefit from our advanced practice track that will bring you up to date and give you new strategies to face the complexities surrounding this area of practice.
Don’t Miss this Informative Plenary Session:
Ready, Set, Go Represent Your Older Client or Client with a Disability

Addressing key issues played out in the institute-wide case study, nationally renowned presenter Robert B. Fleming provides strategies for dealing with clients who may have physical or cognitive deficits. Leave prepared to face the most important dilemmas in elder law and find ways to apply national trends to your practice.

Robert B. Fleming
Fleming & Curti PLC, Tucson, AZ

Robert B. Fleming is a partner in the firm with a practice limited to trust and special needs trust administration, guardianship, conservatorship, estate planning, and probate. He is certified as an estate and trust specialist by the State Bar of Arizona and as a certified elder law lawyer by the National Elder Law Foundation.

Featured Contributors

Peter A. Lichtenberg, PhD
Wayne State University Institute of Gerontology, Detroit

Amy Rombyer Tripp
Chalgian & Tripp Law Offices PLLC, Jackson

Kathleen Hogan Aguilar
Miller Johnson, Grand Rapids

Details

September 10–11, 2015
The Inn at St. John’s
44045 Five Mile Rd,
Plymouth, MI 48170

Level: Basic/
Intermediate/Advanced
CLE: 8.5

Discounted rooms available at
The Inn at St. John’s
See page 5

Special Networking Events:

Exhibit Hall Showcase and Mid-Day Reception
3:00pm/Thursday

Breakfast Roundtable:
Networking and Marketing
8:00am/Friday

Current sitting state court judges receive complimentary admission

Register Today

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Call
877-229-4350

Fax
877-229-4351

Mail
ICLE, 1020 Greene St.
Ann Arbor, MI 48109-1444
THURSDAY, SEPTEMBER 10, 2015

8:00am ICLE Demo—Put the ICLE Partnership Resources to Work for Your Practice
9:00am Welcome and Introduction to the Case Study
9:20am Ready, Set, Go Represent Your Older Client or Client with a Disability
10:45am Networking Break

11:00am Core Concepts Track: Government Benefits A to Z
Advanced Benefits Track: Medicare Advocacy
Counseling Track: The Definitive Guide to Durable Powers of Attorney

12:00pm Lunch on Premises

1:15pm Core Concepts Track: Medicaid Essentials
Advanced Benefits Track: Long-Term Care Insurance
Counseling Track: Answers to All Your Tax Questions

2:15pm Core Concepts Track: The Housing Continuum for the Person with a Disability
Advanced Benefits Track: Advanced Medicaid Techniques
Counseling Track: Protection from Creditors

3:00pm Core Concepts Track: Exhibit Hall Showcase and Mid-Day Reception
Advanced Benefits Track: Exhibit Hall Showcase and Mid-Day Reception
Counseling Track: Exhibit Hall Showcase and Mid-Day Reception

3:45pm Core Concepts Track: Overview of Special Needs Trusts
Advanced Benefits Track: Maneuvering Between VA Benefits and Medicaid
Counseling Track: Recognizing Your Client’s Dementia and Cognitive Impairments

4:40pm Closing Keynote: Elder Law Town Hall

FRIDAY, SEPTEMBER 11, 2015

8:00am Breakfast Roundtable: Networking and Marketing (Separate registration required—limited seating)
9:00am Elder Law Caselaw and Statute Update

9:45am Core Concepts Track: The Housing Continuum for the Elderly*
Advocacy Track: Protective Orders vs. Guardianships and Conservatorships*

10:30am Networking Break

10:45am Core Concepts Track: Caregiver Agreements*
Advocacy Track: Legal and Non-Legal Advocacy to Improve Quality of Care*

11:40am Core Concepts Track: Starting a Disability/SSI Claim*
Advocacy Track: Resolving Common Family Conflicts Involving Seniors*

* MP3 download available to all registrants after the seminar.
Plenary Sessions

**Thursday Moderator:**
Amy Rombyer Tripp, Chalgian & Tripp Law Offices PLLC, Jackson

**Friday Moderator:**
Katie Lynwood, Bernick Radner & Ouellette PC, Lansing

**Thursday/9:00am**
**Welcome and Introduction to the Case Study**

**Thursday/9:20am**
**Ready, Set, Go Represent Your Older Client or Client with a Disability**

Learn to better deal with clients who may have physical or cognitive deficits. Appreciate the duty you may owe to non-clients. Consider practical accommodations you need to make in your office setup and workflow. Ethical dilemmas and pitfalls abound in this area so good preparation will help you solve common dilemmas.

Robert B. Fleming, Fleming & Curti PLC, Tucson, AZ

**Thursday/3:00pm**
**Exhibit Hall Showcase and Mid-Day Reception**

**Thursday/4:40pm**
**Closing Keynote: Elder Law Town Hall**

Robert B. Fleming and select faculty members lead an interactive discussion of new developments, national and local trends, and up-to-the-minute planning strategies in this free-wheeling session to close the day. Get in on the discussion, plus get your questions answered.

Robert B. Fleming, Fleming & Curti PLC, Tucson, AZ

**Friday/8:00am**
**Breakfast Roundtable: Networking and Marketing**

Sit down with the leaders in elder law practice to learn how they rose to the top of their field. Share your experiences, get your questions answered, and network with your colleagues. Get new ideas on how to promote yourself and your practice.

(Limited seating—separate registration required)

**Friday/9:00am**
**Elder Law Caselaw and Statute Update**

Stay ahead of the curve with this practical overview of recent caselaw and statutory changes in Michigan and around the country. Focusing on examples that will likely have the biggest impact on elder and special needs practitioners, apply recent law to advance your clients’ interests and avoid possible pitfalls.

Joseph D. Weiler, Jr., Chalgian & Tripp Law Offices PLLC, Midland; Christopher W. Smith, Chalgian & Tripp Law Offices PLLC, Jackson

Core Concepts Track

**Thursday Moderator:** Terrence G. Quinn, The TGQ Law Firm, Ann Arbor

**Friday Moderator:** Arthur L. Malisow, Mall Malisow & Cooney PC, Farmington Hills

**Thursday/11:00am**
**Government Benefits A to Z**

Grasp the major governmental programs and benefits available to your disabled or elderly clients. Get up-to-date summaries of the most basic eligibility criteria and the benefits available through Social Security Retirement and Disability, Supplemental Security Income, Medicare, Medicaid, and Veterans Benefits.

Melisa M. W. Mysliwiec, Fraser Trebilcock Davis & Dunlap PC, Grand Rapids

**Thursday/1:15pm**
**Medicaid Essentials**

Designed for beginners, learn the eligibility rules for long-term care Medicaid benefits including nursing home Medicaid, MI-Choice waiver, and PACE programs. Master the most common Medicaid/long-term care planning strategies, gain practical tips for interacting effectively with the Department of Human Services, and discover the essential resources to reference as you practice further in this area.

Gregory R. Kish, Scott & Huff PC, Traverse City

**Thursday/2:15pm**
**The Housing Continuum for the Person with a Disability**

Have you wondered what housing options are available for people who need support from the community mental health system? Grasp the difference between licensed and unlicensed settings, bricks and mortar and staffing support and help clients achieve a living arrangement developed through choice.

Lisa P. Lepine, The Arc of Macomb County, Clinton Township

Accommodations

The Inn at St. John’s
44045 Five Mile Rd, Plymouth, MI, 734-414-0600

Use ICLE/Elder Law for a discounted room between 09/09–10/15 for $139/night. Call to reserve.

Reserve by 08/26/2015. Registrants are responsible for their own hotel expenses.
Tracks

Core Concepts Track, con’t
Thursday/3:45pm
Overview of Special Needs Trusts
Which special needs trust is right for your client? Understand
the differences between a self-settled and third-party SNT.
Explore when to use a pooled account trust or a new ABLE
account. Plus, get updated on the Draper case and gain tips
on choosing a trustee.
Amy Rombyer Tripp, Chalgian & Tripp Law Offices PLLC,
Jackson

Friday/9:45am
The Housing Continuum for the Elderly*
Starting with nursing homes, understand residents’ rights,
quality of care, and advocacy for nursing home residents.
Next, identify other Medicaid-funded housing options
for people who need support and services. Compare the
eligibility, funding, obstacles, and benefits for programs like
Home Help, Home Health, MI Choice, and hospice care
options. Plus, review homes for the aged and adult foster care
as well as unlicensed homes.
Alison E. Hirschel, Michigan Poverty Law Program—Elder Justice
Initiative, Lansing

Friday/10:45am
Caregiver Agreements*
Learn the basics of using and drafting caregiving
contracts. Discover the differences between family and
independent caregivers and help your clients develop
good working relationships with caregivers. Assess how
Medicaid and veterans planning impacts your caregiving
contracts and how recent caselaw may change the use of
these critical documents.
Kathleen Hogan Aguilar, Miller Johnson, Grand Rapids

Friday/11:40am
Starting a Disability/SSI Claim*
There is an easy way and the hard way to file a claim
for disability or SSI benefits. Walk through the online
application (the hard way), and discover how to file
a claim the easy way. Explore what happens after a
claim is filed so that you and your clients have a better
understanding of what to expect.
Lewis M. Seward, Seward Tally & Piggott PC, Bay City

Advanced Benefits Track

Moderator: Patrick J. Bond, Bond Estate Planning & Elder Law
PC, Saint Clair Shores
Thursday/11:00am
Medicare Advocacy
Grow your knowledge of Medicare to really help your
clients and their families. Follow the definitive checklist to
create better options for your clients by advocating in the
hospital and skilled nursing facility, including discharge
planning and appealing a termination of skilled care.
Plus, explore the growing issue of coordinating hospice
planning in nursing homes.
Norman S. Harrison, Law Offices of Norman S. Harrison, Saginaw

Thursday/1:15pm
Long-Term Care Insurance
Help design long-term care for clients. Understand the
current costs of care and industry trends. As it becomes more
prevalent, help clients navigate LTC insurance proceeds with
a LTC Medicaid application and the patient pay amount.
Nancy Boari, Long Term Care Specialist, Northwestern Mutual,
Troy; Brian R. Jenney, Kemp Klein Law Firm, Troy

Thursday/2:15pm
Advanced Medicaid Techniques
Gain confidence to implement current, advanced Medicaid
planning strategies by grasping the mechanics of various
techniques. Broaden your perspective with a review of trends
in other states that may impact you and your Michigan
clients in the future.
Norman E. Richards, Foster Swift Collins & Smith PC,
Farmington Hills

Thursday/3:45pm
Maneuvering Between VA Benefits and Medicaid
Learn up-to-date information about changes in VA benefits
and Medicaid to successfully maneuver between the two.
Avoid disqualifying clients or their spouse for one benefit
while planning for the other benefit. Understand how to get
both VA benefits and Medicaid for a married couple without
a reduction in benefits, plus how to get a Medicaid waiver
and VA benefits at the same time.
Robert D. Mannor, Mannor Law Group PLLC, Grand Blanc

* MP3 download available to all registrants after the seminar.
Counseling Track

Moderator: Hon. Milton L. Mack, Jr., Wayne County Probate Court, Detroit

Thursday/11:00am
The Definitive Guide to Durable Powers of Attorney
Protect your clients with well-crafted durable powers of attorney. Identify clauses that are effective and clauses to avoid while drafting. Plus, coordinate your durable powers of attorney with Medicaid planning and elder law.
Charles S. Ofstein, DeMent and Marquardt PLC, Kalamazoo

Thursday/1:15pm
Answers to All Your Tax Questions
Does your trust need an EIN? Can you leave an IRA to a trust? What care costs are deductible for income taxes? Starting with the top 10 tax questions in elder law, we’ll also tackle your individual questions.
Robert B. Fleming, Fleming & Curti PLC, Tucson, AZ

Thursday/2:15pm
Protection from Creditors
Master the safeguards and protections available to stop creditors from taking a client’s income and assets through garnishment, levies, and foreclosure.
Dustin S. Foster, Western Michigan University Thomas M. Cooley Law School, Auburn Hills

Thursday/3:45pm
Recognizing Your Client’s Dementia and Cognitive Impairments
Cognitive decline and impairment is frequently an insidious process. Explore the reasons why cognitive decline is so hard to detect, what interview and observational methods to use to improve detection, and how to assist your client to get the evaluation and care they need. Discover the importance of a good diagnostic work up and gain a broader understanding of cognition.
Peter A. Lichtenberg, PhD, Wayne State University Institute of Gerontology, Detroit

Advocacy Track


Friday/9:45am
Protective Orders vs. Guardianships and Conservatorships*
Sometimes guardianships and conservatorships are not your best planning option, while protective orders can be very effective. Gain new planning strategies and learn how you should use protective orders to qualify clients for Medicaid benefits.
Sara A. Schimke, Barron Rosenberg Mayoras & Mayoras PC, Troy

Friday/10:45am
Legal and Non-Legal Advocacy to Improve Quality of Care*
Obtaining optimal quality of care is a frequent challenge our clients face. When asked to help, we should be prepared to provide real-time advocacy and counsel. Explore a range of legal and non-legal advocacy options to consider when assisting your clients during these often traumatic episodes. Review common quality of care issues and explore the traditional legal route plus alternative, non-legal approaches that can be just as successful.
Sanford J. Mall, Mall Malisow & Cooney PC, Farmington Hills

Friday/11:40am
Resolving Common Family Conflicts Involving Seniors*
Do you feel stuck in the middle of intractable family conflict and dynamics? How do we exercise our responsibility as “counselor” when family history and relationships are tearing the family apart? Learn how mediation techniques improve understanding and communication and grasp when professional help is needed. In this interactive session, explore common scenarios such as caregiver vs. non-caregiver family members, remarriage, and more.
Susan J. Butterwick, Washtenaw County Trial Court Referee, Juvenile Division, Ann Arbor; Zena D. Zumeta, Mediation Training & Consultation Institute, Ann Arbor

* MP3 download available to all registrants after the seminar.
4 Ways to Register

1 Online (with credit card)
   www.icle.org/elderlaw

2 Call (with credit card)
   877-229-4350

3 Fax (form with credit card)
   877-229-4351

4 Mail (form with payment)
   ICLE, 1020 Greene St. Ann Arbor, MI 48109-1444

A. Personal Info
   Name
   MI Bar# ICLE P'ship#
   Firm
   Address
   City State Zip
   Phone Fax
   E-mail

B. Institute Registration | Pick One
   [ ] $395 General
   [ ] $345 ICLE Partner
   [ ] $195 New Lawyer (0–3 Years in Practice P75750+)
   [ ] $295 4+ lawyers from the same firm (per Lawyer)
   [ ] FREE Current sitting state court judges (Limit 40)

C. Materials Format | Institute Registrant Pick One
   [ ] FREE Print Handbook and Electronic Materials
   [ ] Save $25 Electronic Materials Only

D. Breakfast Roundtable | Optional
   [ ] Yes, I will attend. Limit 50. Breakfast included. (No Additional Fee)

E. Institute Materials for Non-Registrant | Optional
   Can’t attend? Purchase the electronic materials and select recordings.
   [ ] $195 Non-ICLE Partner (No Institute Admission)
   [ ] $136.50 ICLE Partner (No Institute Admission)

F. Payment Info | Calculate Total and Select Check/CC
   Institute Registration (Box B) $______
   Electronic Materials Only Discount (Box C) $______
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   Visa Mastercard Amex Discover
   CC No. ______________________ Exp. Date
   Signature for CC

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1 Please attach additional sheet listing lawyers attending.
2 Registrants will receive the print handbook and electronic materials if no format is specified. Select “electronic materials only” discount or enter SAVE25 online to save $25 off registration fee. Materials will be posted online before the seminar.
3 Persons with disabilities or dietary restrictions: For special arrangements please contact ICLE no later than seven days before the seminar.

Walk-in Registrations: Permitted on a space-available basis or if registrants fail to claim their seat in the first 15 minutes of the seminar. Cancellation Policy: In order to receive a full refund, you must notify ICLE by August 27, 2015. After August 27, a $45 handling fee will be assessed. No refunds will be issued after September 3, 2015.