ICLE | Your Partner in Practice

LIVESTREAMS 09/17/21 & ON-DEMAND EVENT AVAILABLE 10/29/21

6TH ANNUAL

Elder Law Institute

PRACTICAL ADVICE
Michigan practitioners share important pandemic lessons learned.

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www.icle.org/elderlaw | 877-229-4350

SPECIAL ADD-ON SEMINAR
Learn how to effectively prepare for and win an MDHHS administrative hearing. *See page 3.*

ON-DEMAND EVENT WITH 5 LIVESTREAMS

ICLE
THE INSTITUTE OF CONTINUING LEGAL EDUCATION
The education provider of the State Bar of Michigan
The State Bar of Michigan • The University of Michigan Law School • Wayne State University Law School • University of Detroit Mercy School of Law • Western Michigan University Thomas M. Cooley Law School • Michigan State University College of Law

Serve the Expanding Needs of Your Clients Confidently

Michigan's most practical elder law event is back. Experienced practitioners share important pandemic lessons learned. Be prepared to handle the increasingly complex issues your aging clients are facing as the landscape continues to evolve.

Use an interactive "decision tree" to advise clients on long-term care decisions. Keep current with the caselaw and statutory update. Identify best practices for handling guardianships.

Ideal for Estate Planners and Those Newer to Elder Law

- Confidently navigate Special Needs Trusts (SNTs)
- Get the foundation you need to tackle Medicaid basics and beyond
- Evaluate and plan for your client's evolving care needs
- Avoid unnecessary risks and costs when advising on Medicare
- Address your client's legal, financial planning, and tax issues using a holistic approach

Ideal for Experienced Elder Law Lawyers

- Avoid pitfalls and identify best practices for handling guardianships
- Advocate effectively for client care in hospitals, nursing homes, and other settings
- Delve into the practical implications of the Elder Abuse Task Force
- Navigate the dynamics of dealing with multiple family members
- Effectively prepare for and win an MDHHS administrative hearing (*see page 3*)

CAN'T-MISS UPDATE IS BACK

Livestreamed 09/17/21 | 10:35am-11:25am

Elder Law Caselaw and Statute Update

"Excellent format." "Great summaries." "Please invite back!"

Past attendees rave about this session. Prepare to be entertained by Chris and Joe as they once again deliver their fast-paced presentation, modeled after ESPN's "Pardon the Interruption."

Speakers

Christopher W. Smith
Chalgian & Tripp Law Offices, *Southfield*

Joseph D. Weiler, Jr.
Chalgian & Tripp Law Offices, *Midland*

Get Practical Advice You Can Use—NOW

Interactive Long-Term Care Planning Decision Tree

Take the guesswork out of planning. Get step-by-step strategies to make the best recommendations for your clients' needs. During this interactive session, use real-world scenarios and see how a panel of experienced lawyers would approach this tough topic. *See page 5.*

Avoiding Medicare Mishaps

Beneficiaries often make poor choices throughout this entire process. Help your clients avoid the usual mistakes and get the benefits they deserve. Walk away with basic—but critical—information, on everything from prescription drug benefits to Medigap plans. *See page 6.*

Guidance on Guardianships

Tackle the tough issues that arise with all aspects of guardianships—from rights of the individual to who should serve as fiduciary. Avoid major mistakes when litigating and know when to use a protective order. Work effectively with the guardian ad litem. *See pages 6 & 7.*

Using Special Needs Trusts Effectively

Be prepared for issues that may arise at any time in your practice. Understand the difference between first- and third-party SNTs and avoid drafting traps. Navigate government procedures and help clients choose the right trustee. *See page 6.*

SPECIAL ADD-ON SEMINAR

LIVESTREAMED ONLY | OCTOBER 21, 2021

Administrative Hearings Before the MDHHS: An Interactive Workshop

Using a true-to-life case study, explore how to effectively prepare for and win a Michigan Department of Health and Human Services (MDHHS) administrative hearing. Effectively use MOAHR and MDHHS rules and procedures to establish your claim, then watch the case unfold in a mock hearing. Experts provide feedback and send you away with a sample hearing brief.

View schedule at www.icle.org/mdhhs.

Special offer—this event is free to current subscribers of ICLE's *Elder Law Certificate Program*. Call ICLE for promo code.

PCP PROBATE & ESTATE PLANNING CERTIFICATE PROGRAM ELECTIVE

Moderator

David L. Shaltz
Chalgian & Tripp Law Offices, *East Lansing*

Speakers

Gregory R. Kish
Kish Dykstra & Scott PC, *Traverse City*

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

Lauretta K. Murphy
Miller Johnson, *Grand Rapids*

Sara B. Rubino
Dickinson Wright PLLC, *Troy*

Sara A. Schimke
Chalgian & Tripp Law Offices, *Southfield*

Save $30 on This Add-On When You Register for the *Elder Law Institute*

Your Registration Is All-Access

This year we're bringing Michigan's elder law community to you! Your all-access registration gives you everything. Get all livestreamed sessions. Plus all on-demand sessions, which include recorded livestreams.

Experts from Across Michigan	**25 Speakers**	Starting September 17, 2021
All Livestreams	**5 Sessions**	Live via Zoom on September 17, 2021
All On-Demand Content	**14 Sessions**	Available October 29, 2021*
Electronic Materials *Individual access to video recordings, written materials, and PowerPoints*	**3-Year Access**	Available October 29, 2021
Discounts**	✓	www.icle.org/elderlaw

**Includes four recorded livestreams.*

***Special deals for paralegals, ICLE Partners, new lawyers, 4+ from the same firm, and more.*

Hear from Experts Like These—**LIVE!**

Five livestreamed sessions cover critical updates and hot topics such as long-term care planning. Get your questions answered in real time from experts such as:

Amy Rombyer Tripp

Chalgian & Tripp Law Offices, *Jackson*

Amy is a well-known practitioner and past chair of the SBM's Elder Law and Disability Rights Section. She has been an integral part of this event since its inception. Amy joins an all-star panel to bring you interactive solutions to long-term care planning.

Robert D. Mannor

Mannor Law Group PLLC, *Grand Blanc*

Bob has 25+ years of experience and is one of only a handful to be nationally board certified by the National Elder Law Foundation. He helps lead our "Town Hall" livestream, a freewheeling discussion where you can get your questions answered.

Agenda

CLE: 12.5 | Level: Basic/Intermediate/Advanced

LIVESTREAMS

NOTE: Four livestreamed sessions will also be recorded and available on demand; "Virtual Networking" is livestreamed only.

Overcoming Obstacles, Breaking Down Stereotypes, and Changing Perspectives

(Livestream 09/17/21, 9:00am–10:20am)

Prior to being elected to Michigan's highest court, Justice Richard Bernstein was known as a tireless advocate for disabled rights. His cases often set national standards for protecting the rights and safety of people with and without disabilities. The first blind justice, elected by voters statewide, to the Michigan Supreme Court, Justice Bernstein shares his life experiences and commitment to justice and fairness with elder law practitioners in this conversational session.

Hon. Richard H. Bernstein, Michigan Supreme Court, *Lansing*

Break

(Livestream 09/17/21, 10:20am–10:35am)

Elder Law Caselaw and Statute Update

(Livestream 09/17/21, 10:35am–11:25am)

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

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

Break

(Livestream 09/17/21, 11:25am–11:40am)

Interactive Long-Term Care Planning Decision Tree

(Livestream 09/17/21, 11:40am–1:00pm)

When evaluating long-term care strategies for your client, the lawyer must ask a series of questions. In this interactive session, identify the critical information you can collect at the initial client meeting. Explore the issues and variables to consider in Medicaid-focused strategies, and how they can impact the options available to your client. Use real-world scenarios and walk step by step through the decision tree from start to finish.

Rosemary Howley Buhl, Buhl Little Lynwood & Harris PLC, *East Lansing;* Arthur L. Malisow, Mall Malisow & Cooney PC, *Farmington Hills;* Melisa M. W. Mysliwiec, Fraser Trebilcock, *Grand Rapids;* Charles S. Ofstein, DeMent & Marquardt PLC, *Kalamazoo;* Amy Rombyer Tripp, Chalgian & Tripp Law Offices, *Jackson*

Lunch Break

(Livestream 09/17/21, 1:00pm–1:45pm)

Elder Law Town Hall and Q&A

(Livestream 09/17/21, 1:45pm–2:30pm)

Select faculty members lead an interactive discussion of new developments, national and local trends, and up-to-the-minute planning strategies in this freewheeling session. Explore the challenges raised by COVID-19 and its ongoing impact on elder law practice. Get in on the discussion and get your questions answered.

Gregory R. Kish, Kish Dykstra & Scott PC, *Traverse City;* Robert D. Mannor, Mannor Law Group PLLC, *Grand Blanc;* Amy Rombyer Tripp, Chalgian & Tripp Law Offices, *Jackson*

Virtual Networking Opportunity

(Livestream Only 09/17/21, 2:30pm)

FEATURED SPEAKER

Hon. Richard H. Bernstein

Michigan Supreme Court, *Lansing*

Justice Bernstein became the first blind justice, elected by voters statewide, to the Michigan Supreme Court in November 2014. He is known for his commitment to justice and fairness, having previously served as a tireless advocate for disabled rights as a lawyer at The Sam Bernstein Law Firm. His cases often set national standards.

In a can't-miss presentation, Justice Bernstein discusses overcoming obstacles, breaking down stereotypes, and changing perspectives using his life experiences. He also answers your questions in this conversational session.

Agenda

SESSION DURATIONS: Each runs 30-60 minutes on average.

ON-DEMAND SESSIONS

Legal Planning for Different Levels of Care

Effectively evaluate the caregiving needs of your client and how to assist in long-term care planning. Delve into the legal documents or court action that may be required. What are the different levels of care? How do different living options interact with care and government benefits? Explore the resources available to keep the client independent and aging in place or in a medically necessary environment. Identify the timeline in your case and what can you do to assist in crafting the care plan.

Robert D. Mannor, Mannor Law Group PLLC, *Grand Blanc;* Kelly J. McNerney Quardokus, Q Elderlaw PLC, *Portage*

Avoiding Medicare Mishaps

There are three time frames when Medicare beneficiaries make suboptimal choices: before enrollment, during enrollment, and after enrollment. Basic misunderstanding of Medicare and health insurance can lead to a litany of further errors and make a difficult situation worse for your client and their supporters. Learn what you need to know about Medicare, Medicare Advantage, Medigap, and prescription drug benefits, and take away what to watch for to avoid unnecessary risks and costs.

Jae Oh, Great Humanity Healthcare Foundation, *Ann Arbor*

Panel Perspectives on Michigan's Elder Abuse Task Force

Explore the reasons behind the Elder Abuse Task Force, what it has accomplished to date (including the Financial Exploitation Prevention Act), and what is still to come. Hear a balance of perspectives on the impact of the Task Force's initiatives—from the vantage point of those petitioning for guardianship, serving as guardian, representing victims, and prosecuting elder abuse. Gain critical insight on the issues and hear about the proposed solutions in this can't-miss discussion.

Katharyn A. Barron, Department of Attorney General, *Lansing;* Georgia Callis, Guardian Care Inc, *Southfield;* Alison E. Hirschel, Michigan Elder Justice Initiative, *Lansing;* Nathan R. Piwowarski, McCurdy Wotila & Porteous PC, *Cadillac*

Medicaid Fundamentals

Designed for beginners. Learn the eligibility rules for long-term care Medicaid benefits, including nursing home Medicaid, MI Choice Waiver, and PACE programs. Learn about the most common Medicaid/long-term care planning strategies, gain practical tips for interacting effectively with the Department of Health and Human Services (including its Universal Caseload System), and discover the essential resources to reference as you practice further in this area.

Raymond A. Harris, Buhl Little Lynwood & Harris PLC, *East Lansing*

Care Advocacy Skills

Learn effective care advocacy skills to employ for your clients in a variety of settings. From hospitals to assisted living facilities, nursing homes, and insurance companies, identify the nuances of the organizational structures and uncover how to make the biggest impact when it comes to advocating for care needs.

Harley D. Manela, Mall Malisow & Cooney PC, *Farmington Hills*

Using Special Needs Trusts Effectively

Grasp the key differences between first- and third-party special needs trusts and how to avoid common drafting traps. Gain insight on making permissible distributions and reporting to government agencies. Advise clients on critical trustee responsibilities and understand the potential conflicts of interest when choosing a trustee.

Kathleen Hogan Aguilar, Rhoades McKee PC, *Grand Rapids*

Guardianship Guidance: What You Need to Know

Clarify who your client is and delve into the rights of the individual under a petition. Explore who has priority to serve as fiduciary and identify the critical issues when handling guardianships. Gain insight on the statutory changes that may impact guardianships and conservatorships in the future.

Nicole Shannon, Michigan Elder Justice Initiative, *Lansing*

Collaborative Approaches to Assisting Your Clients

Three heads are better than one. Lawyers, CPAs, and financial advisors will typically see the same set of facts through different lenses. Learn how collaborating with a CPA and a financial advisor helps ensure that your client's legal, financial planning, and tax issues are properly addressed. Discover how this holistic approach can help improve the results you provide clients whether at the stage of estate planning or administration, asset spend-down, or asset protection.

Alexander Dinser, Horizon Advisers, *Troy;* Sanford J. Mall, Mall Malisow & Cooney PC, *Farmington Hills;* Stuart M. Sakwa, CPA, Schlaupitz Madhavan PC, *Southfield*

Elder Law Litigation: Guardianships and Conservatorships

Explore the intricacies of elder law litigation—from how these cases arise to the critical pitfalls to avoid. How does a trust or power of attorney affect appointment of a guardian or conservator? When is a protective order a better option? Learn to effectively interact with the court-appointed guardian ad litem and identify key issues surrounding spousal elections, allowances and estate recovery. Take away practice pointers on gerontologists, medical case managers, and sequestration.

Joseph P. Buttiglieri, Kemp Klein Law Firm, *Troy*

Ethics Issues in Elder Law: When 'Family' Gets Complicated

One of multiple adult children comes to you for assistance with the estate of an aging, and partially debilitated, parent, now unable to handle their own finances. Maybe there's also a closely held business or farm. Who is your client? How do you handle the potential conflict issues? Who pays? To whom may you, and must you, communicate? How do you document this? Explore these ethical challenges in real-world scenarios and identify practical solutions to use in your elder law practice.

John W. Allen, Varnum LLP, *Kalamazoo*

> " I think the information is really practical and useful in day-to-day service of clients.
>
> Gregory R. Kish,
> Kish Dykstra & Scott PC, *Traverse City*

> " I've been practicing in this area now for more than two decades. The *Elder Law Institute* is a must-attend event.
>
> Sanford J. Mall,
> Mall Malisow & Cooney PC, *Farmington Hills*

POPULAR SESSION *See page 6.*

Medicaid Fundamentals

Back by popular demand, this session covers the basics from A to Z. Learn the rules and apply them; get strategies and practical tips for interacting with the MDHHS; and discover essential resources you'll reference time and again.

Speaker

Raymond A. Harris
Buhl Little Lynwood & Harris PLC, *East Lansing*

6TH ANNUAL

Elder Law Institute

25 Speakers. 14 Sessions.
Including 5 Livestreams.

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B. Institute Registration | Pick One

Elder Law Institute

Includes electronic materials. Get individual on-demand access to video recordings, written materials, and PowerPoints for three years starting 10/29/21. Plus livestreamed sessions on 09/17/21, four of which will also be recorded and available on demand.

- ☐ **$345** General
- ☐ **$295** ICLE Partner
- ☐ **$195** Paralegal
- ☐ **$195** New Lawyer (0–3 Years in Practice P82385+)
- ☐ **$245** per Registrant (4+ Registrants from the Same Firm)[1]

Special Registration

- ☐ **FREE** Judges (Limit 40)[2]

21CI-2632

C. Add-On Seminar Registration | Optional

Livestream 10/21/21, 9:30am–12:30pm

Administrative Hearings Before the MDHHS: An Interactive Workshop

- ☐ **$165** Elder Law Institute Registrant
- ☐ **$195** General (Not Attending the *Elder Law Institute*)
- ☐ **$165** ICLE Partner
- ☐ **$95** New Lawyer (0–3 Years in Practice P82385+)

Current subscribers to ICLE's Elder Law Certificate Program: this add-on is free. Call ICLE for promo code.

21CK-2664

D. Livestreamed Sessions | 09/17/21

Four livestreamed sessions will also be recorded and available on demand; "Virtual Networking" is livestreamed only.

- ☐ **Overcoming Obstacles, Breaking Down Stereotypes, and Changing Perspectives** (09/17/21, 9:00am-10:20am)
- ☐ **Elder Law Caselaw and Statute Update** (09/17/21, 10:35am-11:25am)
- ☐ **Interactive Long-Term Care Planning Decision Tree** (09/17/21, 11:40am-1:00pm)
- ☐ **Elder Law Town Hall and Q&A** (09/17/21, 1:45pm-2:30pm)
- ☐ **Virtual Networking Opportunity** (09/17/21, 2:30pm-3:00pm)

E. Payment Info

Institute Registration (Box B) $________

Add-On Seminar Registration (Optional, Box C) $________

Total Amount Due $________

Please make your payment online with credit card:
www.icle.org/elderlaw

Need help? Call ICLE at 877-229-4350.
During COVID-19, we are not able to accept credit card payment by phone or mail.

Alternate payment option:

If you need to pay by check, please mail form with payment to:
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Cannot combine discounts. [1]Please attach additional sheet listing registrants attending. All registrations must be submitted and paid for at the same time. [2]Current sitting state court judges (limit 40) attend free and must call ICLE or submit order form to register. **Complete Seminar Policies:** www.icle.org/info/seminarpolicies. **Institute Cancellation Policy:** For a full refund, notify ICLE by 09/16/21. No refunds will be issued after 09/16/21. **Special Add-On Seminar Cancellation Policy:** For a full refund, notify ICLE by 10/20/21. No refunds will be issued after 10/20/21. **Terms and Conditions:** Access to online seminar materials for an ICLE institute/conference/summit or an on-demand event (including the materials, video, and audio files) is granted only to me, the customer registered for the event, and I am not permitted to share my access. See www.icle.org/info/termsconditions.

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