CLE24-346

Ohio Special Needs and Elder Law Planning

PROGRAM HIGHLIGHTS

This program will provide in-depth discussions on:

- Understand the differences between Supplemental Security Income (SSI), Social Security Disability Insurance (SSDI) and Childhood Disability Benefits (CDB).
- Learn how to evaluate and determine the best planning tools for each client.
- Receive guidance on Special Need Trust (SNT) distribution and income rules and planning considerations when structuring and administering SNTs.
- Discover best practices for fostering productive attorney partnerships.
- Learn about considerations for when a special needs client becomes an elder law client.

GROUP DISCOUNT:

Three or more registrants from the same office receive $25 off per registrant when registering for the full-day seminar. Registrations must be submitted at the same time to be eligible.

PROGRAM PRICING:

Member		Nonmember
MP $192	**MVP** $0	$275

TWO WAYS TO REGISTER

Register Online:

Webcast Attendance
Visit ohiobar.org/CLE24-346-LIW

Give Us a Call:

800 232-7124

Cancellation Policy:
To view our CLE cancellation policy and FAQs, visit ohiobar.org/cle-information.

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Ohio Special Needs and Elder Law Planning

DATE, TIME AND LOCATION(S):
NOV 13 | 8:30 AM – 4:00 PM
Webcast

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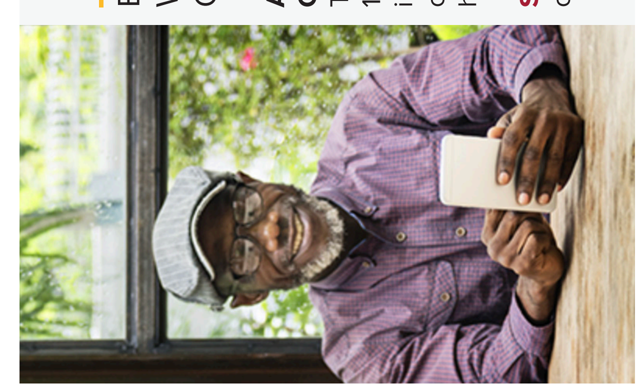

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6.0 HOURS

The CLE You Need, The Way You Want It

- **Approved for 6.0 OSBA Elder Law Certification Hours**
- **Approved for 6.0 Estate Planning, Trust and Probate Law Certification Hours**
- **Qualifies for 1.0 Professional Conduct Hour**

This advanced course will help Ohio practitioners guide their clients through complex regulations, ensuring their wealth is preserved for their own use without affecting essential benefits. Attendees will learn how to enhance the financial security and quality of life for eligible clients.

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COURSE PLANNERS

Kim Cullman Estess, Esq.; Co-Chair Ohio Bar Elder Law Section; OSBA Certified Specialist in Elder Law and Estate Planning, Trust and Probate Law and National Elder Law Foundation; O'Diam & Estess Law Group, Inc.; Dayton

Blaine P. Brockman, Esq.; Hickman & Lowder, Co., L.P.A.; Dublin

Christina M. Bushnell, Esq.; McFadden Bushnell, LLC; Shaker Heights

Elizabeth A. Durnell-Maier, Esq.; Co-Chair Ohio Bar Elder Law Section; OSBA Certified Specialist in Elder Law and National Elder Law Foundation; Durnell Maier Law, LLC; Sidney

Jennifer L. Lile, Esq.; OSBA Certified Specialist in Elder Law and Estate Planning, Trust and Probate Law and National Elder Law Foundation; Krugliak, Wilkins, Griffiths & Dougherty; Canton

ABOUT THE PROGRAM

This advanced program offers a vital update for attorneys working with special needs clients. It will cover topics like Social Security, Medicaid, estate planning, trust distributions, special needs trusts and ethical considerations. Attendees will learn how to enhance the financial security and quality of life for eligible clients, identify key issues and challenges in special needs and elder law planning and help clients navigate complex regulations to preserve their wealth without affecting essential benefits.

PROGRAM AGENDA

8:30 The ABC's of Benefits

A brief overview of Social Security and Medicaid benefits, including the differences between SSI, SSDI and CDB.

Ashley Shannon Burke, Esq.; OSBA Certified Specialist in Elder Law and National Elder Law Foundation; Burke & Pecquet, LLC; Cincinnati

9:30 Representing the Special Needs Family

We'll cover key issues to address when advising a family with a special-needs individual. Whether the client comes to you asking about a SNT or guardianship or they are only interested in more traditional estate planning, attorneys must be equipped to issue spot and not miss opportunities to advise these families. Topics will include evaluating the best planning tools for each client, guiding clients in choosing the right fiduciaries and tools for planning for the special-needs loved one for many years to come.

Kim Cullman Estess, Esq.; Co-Chair Ohio Bar Elder Law Section; OSBA Certified Specialist in Elder Law and Estate Planning, Trust and Probate Law and National Elder Law Foundation; O'Diam & Estess Law Group, Inc.; Dayton

10:30 Break

10:45 Special Needs Trust Distributions: Best Practices When Drafting and Administering Special Needs Trusts

This session will review SNT distribution, income rules and planning considerations when structuring and administering SNTs. The panel will discuss the impact of SNT distributions on SSI and Medicaid, key trust provisions, permissible distributions, tax issues, trust accounting, eligibility rules for means-test programs and other key items that must be considered in SNT distributions and planning. We will also address how to minimize payback after the recipient's death.

Dawn E. McFadden, Esq.; McFadden Bushnell, LLC; Shaker Heights
Elizabeth A. Durnell-Maier, Esq.; Co-Chair Ohio Bar Elder Law Section; OSBA Certified Specialist in Elder Law and National Elder Law Foundation; Durnell Maier Law, LLC; Sidney
Maggie L. Sutton, Esq.; Certified Specialist National Elder Law Foundation; Taps Sutton & Roshon, LLC; Columbus

11:45 Lunch

12:45 Bridging the Gap: Collaborative Approaches in Settlement Planning for Persons With Disabilities

We will delve into the critical intersection of settlement planning and SNT establishment, focusing on how these practices can be effectively integrated to protect the long-term interests of clients with disabilities. You will learn practical strategies for working alongside personal injury attorneys to ensure that settlements are structured in a way that maximizes benefits and minimizes risks. Key takeaways will include best practices for fostering productive attorney partnerships, understanding the role of SNTs in settlement planning and ensuring that clients' needs are met with empathy and precision.

Michele P. Fuller, Esq.; Michigan Law Center, P.L.L.C.; Macomb, Mich.

1:45 Break

2:00 Who Do I Represent: The Essentials of Engagement – Ethical Considerations Around Knowing Who Your Client Is in Special Needs Cases (Professional Conduct)

This session will not only cover the basics in navigating the timeless "Who is your client" question, but will also give practitioners guidelines to use when navigating the entire representation to not lose sight of the client while adhering to Rule 1.14 of the rules of professional conduct.

Gwenevier N. Demarest, Esq.; Certified Specialist National Elder Law Foundation; Demarest & Demarest, LLC; Bellbrook

3:00 When Your Special Needs Client Becomes Your Elder Law Client

The panel will discuss issues that may arise when a disabled individual ages and begins to encounter typical elder issues. We'll address considerations for end of life including what to consider when deciding to go on hospice, how to do Medicaid long term planning and how to manage the payback per Medicaid Estate Recovery.

Blaine P. Brockman, Esq.; Hickman & Lowder, Co., L.P.A.; Dublin
Christina M. Bushnell, Esq.; McFadden Bushnell, LLC; Shaker Heights
Jennifer L. Lile, Esq.; OSBA Certified Specialist in Elder Law and Estate Planning, Trust and Probate Law and National Elder Law Foundation; Krugliak, Wilkins, Griffiths & Dougherty; Canton

4:00 Program Concludes

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