Ohio Elder Law Institute

Thurs., April 3, 2025 | 9:00 AM – 4:30 PM
Fri., April 4, 2025 | 8:30 AM – 4:00 PM
12.0 total CLE hrs. | 1.5 Professional Conduct hrs.

Approved for 12.0 Ohio Bar Elder Law Certification Hours
Approved for 12.0 Ohio Bar Estate Planning, Trust and Probate Law Certification Hours

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Register for In-Person: The Grand Event Center at Grandview Yard | 820 Goodale Blvd., Columbus, OH 43212

*Discounted overnight accommodations are available at Hyatt Place Columbus/OSU. Reservations can be made at a discounted rate by calling (888) 492-8847 and referencing group code **G-OELN**. Reservations must be made by **March 12, 2025.***

Register for Webcast Day 1 | Webcast Day 2

The Ohio Elder Law Institute will feature expert discussions on hot topics in elder and estate planning, trust and probate laws in Ohio. Sessions will explore an enhanced understanding of Medicaid planning, current administrative decisions, guardianships, the complexities of mental health through the aging process, navigating AI in the elder law arena, eligibility requirements for Veteran's benefits and more.

PROGRAM AGENDA

Thursday, April 3, 2025 | Day 1
6.0 total CLE hours, including 0.50 Professional Conduct Hour

8:30 **In-Person Registration/Breakfast**

9:00 **Case Law Update**
This session will review Medicaid state hearing and administrative appeal decisions and case law updates from the past year on noteworthy issues affecting long-term care Medicaid benefits.

Speaker:
Maggie L. Sutton, Esq.; Certified Specialist National Elder Law Foundation; Taps Sutton & Roshon, LLC; Columbus

10:00 **Into the Weeds: Ohio's Assisted Living HCBS Waiver Program**
The Assisted Living Home and Community-Based Services (HCBS) Waiver program is difficult to navigate, yet integral to clients seeking community level supports. This session will focus on eligibility requirements and the application process.

Speaker:

Lindsay C. Jones, Esq.; Schraff Thomas Law, LLC; Willoughby Hills

11:00 Break

11:15 The Intersection of Medicaid Planning and Guardianships
Guardianship is often seen as a restrictive and cumbersome court process. However, the law allows the creative practitioner the opportunity to explore Medicaid qualification and even planning options through a guardianship. This session will take a closer look at the laws that allow such planning and the options available.

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

Hon. Thomas M. O'Diam; Greene County Probate Court; Xenia

12:15 Lunch

1:15 Mental Health Is Complex
A panel discussion on the complexities of helping clients with mental health through the aging process including interactions through probate court, governmental benefits and more.

Moderator:
Dawn E. McFadden, Esq.; McFadden Bushnell, LLC; Shaker Heights

Panelists:
Ashley Shannon Burke, Esq.; Ohio Bar Certified Specialist in Elder Law and National Elder Law Foundation; Burke & Pecquet, LLC; Cincinnati

Regina Campbell, Esq.; Managing Attorney, Income, Work and Health Practice Group; Legal Aid Society of Greater Cincinnati; Cincinnati

Norma I. Tirado, J.D.; PASRR Policy Administrator, Ohio Department of Medicaid; Columbus

2:45 Gray Areas: Navigating AI in Elder Law (Professional Conduct)
Learn more about AI implications and uses in elder law and estate planning including specific applications and considerations for use. This technology may raise complex and challenging ethical questions for attorneys in relevance to rules 1.1, 1.4 and 8.4 of the Ohio Rules of Professional Conduct and the practice of law. This session will outline how to practice competently, maintaining honesty, integrity, client confidentiality while limiting vulnerabilities in client communications and court filings utilizing AI. Come with your questions and experiences so we can explore more about its uses and risks.

Speakers:
Trudie Effron; 3L; University of Akron School of Law; Akron

Rachel A. Kabb-Effron, Esq.; Ohio Bar Certified Specialist Elder Law and Estate Planning, Trust and Probate Law and National Elder Law Foundation; Kabb Law; Beachwood

3:15 **Break**

3:30 **We Must Protect This House: Medicaid Planning for the Home**
A home is often a client's most valuable asset, both financially and sentimentally, and the planning options impacting the home are complex. We will explore options for treatment of a home before, during and after a Medicaid application, including Medicaid estate recovery implications.

Speaker:
Brittany O'Diam, Esq.; Ohio Bar Certified Specialist in Elder Law and Estate Planning, Trust and Probate Law and National Elder Law Foundation; O'Diam & Estess Law Group, Inc.; Centerville

4:30 **Day 1 Concludes**

Friday, April 4, 2025 | Day 2
6.0 total CLE hours, including 1.0 Professional Conduct hour

8:00 **In-Person Registration/Breakfast**

8:30 **Probate Law Potpourri: Case Law Update, Land Sales and Declaratory Judgments**
An overview of major case law updates from the last year in the probate world. We'll also discuss land sale actions and the various ways declaratory judgment actions can be used in probate cases.

Speaker:
Jessica S. Forrest, Esq.; Reminger Co., LPA; Akron/Cleveland

10:00 **The Effects of Trauma and Compassion Fatigue on the Lawyer Who Cares (Professional Conduct)**
As attorneys, our lives are filled to the brim with anxiety and stress. The consequences of shrugging it off can be catastrophic and can lead to unethical behaviors and malpractice while representing clients. One of those consequences that we often hear about is burnout. There's a special type of burnout called "secondary traumatic stress" or "compassion fatigue." This session will cover these issues, including what to watch out for and what resources are available. The Ohio Rules of Professional Conduct will be reviewed and applied throughout this session.

Speaker:
Brian S. Quinn, Esq.; Education and Outreach Coordinator; Lawyers Concerned for Lawyers of PA., Inc.; Havertown, Pa.

11:00 **Break**

11:15 **Incorporating Supported Decision-Making in Your Elder Law Practice**
An overview of supported decision-making principles and how they apply in elder law cases. It will also provide tips and best practices for how to begin to incorporate supported decision-making into your elder law practice.

Speaker:
Kristen Henry, J.D.; Advocacy & Protective Services, Inc. (APSI Ohio); Columbus

12:15 **Lunch**

1:15 **The Convergence of Veteran's Benefits and Medicaid**
An in-depth discussion regarding eligibility requirements for aid and attendance for veterans and their surviving spouses. Rick and Rachael will discuss some of the common pitfalls when attempting to plan for both Medicaid and Aid and Attendance with regards to affording long term care.

Speakers:
Rachael A. Houck, Esq.; Certified Specialist National Elder Law Foundation; Houck Menninger Law, LLC; Centerville

Richard A. Myers, Jr., Esq.; Richard A. Myers, Jr. & Associates, LLC; Westlake

2:45 **Break**

3:00 **"Hiring, Firing, Employee Retention, Technology, Oh MY!"**
Law school is great at teaching law, but not so great at teaching you how to run a successful law firm. From staffing decisions to technology considerations that are essential for efficient firm management, to marketing in order to grow the firm, there are dozens of daily decisions that are above and beyond the legal work we do. Join us for a panel discussion on all the highs and lows of starting and running a successful elder law practice.

Moderator:
Gwenevier N. Demarest, Esq.; Demarest & Demarest, LLC; Bellbrook

Panelists:
Ashley Shannon Burke, Esq.; Ohio Bar Certified Specialist in Elder Law and National Elder Law Foundation; Burke & Pecquet, LLC; Cincinnati

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

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

Brittany O'Diam, Esq.; Ohio Bar Certified Specialist Elder Law and Estate Planning, Trust and Probate Law and National Elder Law Foundation; Centerville

4:00 **Institute Concludes**

THANK YOU TO OUR 2025 COURSE PLANNERS!

Thank you to this year's Planning Committee, for assembling a timely and interesting agenda with a slate of world class thought leaders. It is because of our dedicated volunteer planners and speakers that the Ohio Elder Law Institute is seemingly stronger each year.

PLANNING COMMITTEE

Elizabeth A. Durnell-Maier, Esq.; Co-Chair, Ohio Bar Elder Law Section; Ohio Bar Certified Specialist in Elder Law and National Elder Law Foundation; Durnell Maier Law, LLC; Sidney
Ashley Shannon Burke, Esq.; Ohio Bar Certified Specialist in Elder Law and National Elder Law Foundation; Burke & Pecquet, LLC; Cincinnati
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