

NAELA Annual Meeting Pre-Session Advanced Elder Law Review

The CELA Prep Course on Monday, May 10, is complimentary for all Advanced Elder Law Review Course participants.

Tuesday, May 11, 2010 • 7:50 am–6:15 pm

Separate Registration Required. See registration form on page 13.

NAELA is offering a fast-paced, day-long course taught by Certified Elder Law Attorneys for those who want to update their Elder Law knowledge.

If you're looking to expand your knowledge of Elder and Special Needs Law or gain greater expertise in specific practice areas, this is the course is for you.

7:30 am–7:50 am

REGISTRATION/COFFEE SERVICE

7:50 am–8:00 am

WELCOME

8:00 am–10:00 am

PUBLIC BENEFITS: MEDICAID, MEDICARE, SOCIAL SECURITY AND VA

Speakers: Morris Klein, CELA ; Gregory Wilcox, CELA; Vicki Gottlich; Jennifer Vanderveen, CELA

Advice, including planning for and assisting in obtaining Medicaid, Medicare, Social Security benefits, Supplemental Security Income, Veterans benefits and housing and food programs.

10:00 am–11:00 am

PRE MORTEM TAX PLANNING

Speaker: Hyman Darling, CELA

Giving advice and preparing documents regarding wills, trusts, durable general or financial powers of attorney, real estate, gifting, and the financial and income, estate and gift tax implications of any proposed action.

11:00 am–11:15 am

COFFEE BREAK

11:15 am–11:45 am

LEGAL CAPACITY COUNSELING

Speaker: Paul Sturgul, CELA

Advising how capacity is determined and the level of capacity required for various legal activities, and representing those who are or may be the subject of guardianship/conservatorship proceedings or other protective arrangements.

11:45 am–12:15 pm

HEALTH AND PERSONAL CARE PLANNING

Speaker: Catherine Seal, CELA

Advice regarding, and preparing advance medical directives (medical powers of attorney, living wills, and health care declarations) and counseling older persons, individuals with supplemental/special needs, attorneys-in-fact, and families about life care, medical and life sustaining choices, and related personal life choices.

12:15 pm–1:00 pm

LUNCH

Included in Registration Fee

Concurrent Sessions

1:00 pm–2:00 pm

HOUSING/RESIDENTS RIGHTS ADVOCACY

Speaker: Bailey Liipfert III, CELA

Housing counseling, including reviewing the alternatives available and their financing such as: renovation loan programs, life care contracts, home equity conversion, reverse and other mortgage options.

Resident Rights Advocacy, including advising patients and residents of hospitals, nursing facilities, continuing care retirement communities, assisted living facilities, adult care facilities, and those cared for in their homes of their rights and appropriate remedies in matters such as admission, transfer and discharge.

Policies, quality of care, and related issues.

INSURANCE AND ANNUITIES/EMPLOYMENT, AGE AND DISABILITY DISCRIMINATION

Speakers: Robert Anderson, CELA, Kate Mewhinney, CELA

Analyzing and explaining the types of insurance available, such as health, life, long-term care, home care, COBRA, medigap, long-term disability, dread disease, prescription coverage, and burial/funeral policies.

Counseling with regard to age and/or disability discrimination in employment, housing and related areas.

2:00 pm–3:00 pm

FIDUCIARY REPRESENTATION

Speaker: Elizabeth Forgotson Goldberg, CELA

Seeking the appointment of, giving advice to, representing, or serving as executor, personal representative, attorney-in-fact, trustee, guardian, conservator, representative payee, or other formal or informal fiduciary.

3:00 pm–3:15 pm

COFFEE BREAK

3:15 pm–4:15 pm

LITIGATION AND ADMINISTRATIVE ADVOCACY

Speaker: Thomas Begley III, CELA

Connection with any of the above matters, including will contests, contested capacity issues, elder abuse (including financial or consumer fraud), fiduciary administration, public benefits, nursing home torts, and discrimination.

4:15 pm–5:15 pm

SPECIAL NEEDS COUNSELING

Speaker: A. Frank Johns, CELA

The planning, drafting and administration of special/supplemental needs trusts, housing, employment, education and related issues.

5:15 pm–6:15 pm

EMPLOYMENT AND RETIREMENT

Speaker: Bradley Frigon, CELA

Including pensions, retiree health benefits, unemployment benefits, and other benefits.

Special Thanks to the 2010 NAELA Advanced Elder Law Review Committee

Ian Oppenheim, CELA, Chair

Halifax, Mass.

Edwin Boyer

Sarasota, Fla.

Robert Fleming, CELA

Tucson, Ariz.

Rebecca Morgan

St. Petersburg, Fla.

Stephen Spano, CELA

Saugus, Mass.

Paul Sturgul, CELA

Hurley, Wis.

Meals

Lunch will be provided on Tuesday May 11, 2010.

Continuing Legal Education Accreditation

NAELA will apply for continuing legal education (including ethics) credits in all applicable states. The appropriate forms and information will be available at the conference.

CELA Prep Course

Monday, May 10, 2010 • 1:00 pm–5:00 pm

NEW

Learn what to expect on exam day by taking the CELA Prep Course.

Separate Registration Required.

NAELA offers this half-day course to help prepare you for the National Elder Law Foundation's Certified Elder Law Attorney certification exam. You'll get tips, sample questions, and in-depth information about the exam.

1:00 pm-1:20 pm

REGISTRATION

1:20 pm-1:30 pm

WELCOME

1:30 pm-3:10 pm

TEST REVIEW, SAMPLES, QUESTIONS AND ANSWERS

Speakers: Edwin Boyer and Rebecca Morgan

3:10 pm-3:25 pm

BREAK

3:25 pm-4:15 pm

HOW TO TAKE THE CELA EXAM

Speaker: Robert Fleming, CELA

4:15 pm-4:45 pm

APPEAL PROCESS: REQUIREMENTS FOR APPLICATION

Speaker: Ian Oppenheim, CELA

4:45 pm-5:00 pm

CLOSING REMARKS

2010 Advanced Elder Law Review/CELA Prep Course
May 10-11, 2010

Disney's Yacht & Beach Club Resort • Lake Buena Vista, Florida

2010 ADVANCED ELDER LAW REVIEW/CELA PREP COURSE REGISTRATION FORM

The Advanced Elder Law Review and CELA Prep Course begin prior to the Annual Meeting.

A separate registration form for the Annual Meeting is on page 11.

NAELA OFFICE USE ONLY	
Amt \$	_____
Type	_____
Date	_____
Order #	_____

Please add \$100 if registration is not received by April 9, 2010.

Advanced Elder Law Review Registration Includes Complimentary CELA Prep Course

CELA Prep Only

- NAELA Member \$275 \$175 \$ _____
- Nonmember \$375 \$275 \$ _____
- Printed Advanced Elder Law Review Materials \$250 \$ _____

Advanced Elder Law materials will be complimentary in USB format. Add this amount to your total if you wish to receive the printed manual on-site.

Total Registration Fee \$ _____

Name _____

Nickname (for Badge) _____

Business Name _____

Address _____

City _____ State _____ Zip _____

Telephone _____ Fax _____

E-mail _____

Preferred method for receiving confirmation of registration: E-mail Fax

Payment Information

Please complete the registration form and return with a check payable to NAELA or charge below to:

- VISA MC AMEX

Account No. _____ Exp. Date _____

Signature _____

Card Holder's Name _____

In case of an on-site emergency, please contact (please print clearly):

Name: _____ Relationship to you: _____

Phone: _____

Confirmation: Please note you are not registered for the CELA Prep Course and/or Advanced Elder Law Review until you receive confirmation. Please bring your confirmation of registration with you.

National Elder Law Foundation: CELA Exam

The exam is given in regional locations proctored at CELA attorney offices. The exam consists of two sessions — a three-hour morning session and 2.5-hour afternoon session. Individuals need to contact the NELF office for exam locations. The exam registration, short form application, and the NELF rules and regulations, explaining the certification program, can be found on the NELF web site www.NELF.org under "Becoming a Certified Elder Law Attorney." If the individual can satisfy the certification standards and wishes to begin the certification process, they need to complete the short form application, enclose payment, and return the application to the NELF office. Upon receipt their file will be opened. The exam registration and short form application must be completed at least 30 days prior to the date of the exam. **For more information on obtaining your CELA designation, please contact NELF Executive Director Lori Barbee at lori@nelf.org.** The next CELA Exam is scheduled for August 27, 2010.

Refund Policy

No refunds will be issued after April 9, 2010; however, cancellations will receive a USB Drive of the materials. Cancellations before that date will receive a refund minus a \$100 administrative fee. Substitutions are welcome. Changes or cancellations must be made in writing to the NAELA Office.

3 Easy Ways to Register:

- 1. Online**
www.NAELA.org
- 2. By Fax**
703-563-9504
- 3. By Mail**
NAELA 2010 Advanced Elder Law Review/CELA Prep Course
1577 Spring Hill Road Ste 220
Vienna, VA 22182