



**The Florida Bar Continuing Legal Education Committee
and
The Elder Law Section present**

Elder Law Annual Update and Review Course

COURSE CLASSIFICATION: ADVANCED LEVEL



REUNION RESORTSM
WYNDHAM GRAND RESORT
ORLANDO FLORIDA

LIVE PRESENTATION:

Two Days - Friday, January 18 - Saturday 19, 2013

**Reunion Resort in Orlando
7593 Gathering Drive
Reunion, FL 34747**

RESERVATIONS: (866) 880-8563

Course No. 1439R

SCHEDULE

The Elder Law Annual Update and Review Course is a comprehensive review course covering the key practice areas lawyers need to know in order to work with and plan for elderly and special needs clientele. In addition, the course will cover the recent changes practitioners need to know and will discuss the common legal and ethical pitfalls arising from working with the elderly and those with special needs. For attorneys preparing to take the Elder Law Board Certification exam, the course includes special components designed to provide invaluable tips and assistance in preparing for the exam.

DAY ONE: FRIDAY, JANUARY 18

7:50 a.m. – 8:15 a.m.	Late Registration and Continental Breakfast
8:15 a.m. – 8:20 a.m.	Welcome and Announcements <i>John Clardy, Crystal River</i>
8:20 a.m. – 9:00 a.m.	Health Insurance <i>Scott Solkoff, Delray Beach</i>
9:00 a.m. – 9:50 a.m.	Medicaid Part 1-Planning and Strategies <i>Emma Hemness, Brandon</i>
9:50 a.m. – 10:20 a.m.	Medicaid Part 2- Case Law and Administrative Updates <i>Rebecca Bell, Port Richey</i>
10:20 a.m. – 10:30 a.m.	Break
10:30 a.m. – 11:20 a.m.	VA Part 1- Retirement and Survivor Benefits <i>Valerie Peterson, Eugene, Oregon</i>
11:20 a.m. – 11:50 a.m.	VA Part 2- Ethical Issues Updates and Planning Strategies <i>Jack Rosenkranz, Tampa</i>
11:50 a.m. – 12:20 p.m.	Nursing Home/Assisted Living Facility Torts <i>Dean Leboeuf, Tallahassee</i>
12:20 p.m. – 1:20 p.m.	Lunch – Task Force Update
1:20 p.m. – 2:00 p.m.	Social Security Issues for the Advanced Elder Law Attorney <i>David Lillesand, Clearwater</i>
2:00 p.m. – 2:30 p.m.	Special Needs Trust <i>Lauchlin Waldoch, Tallahassee</i>
2:30 p.m. – 3:00 p.m.	Administrative Advocacy <i>Nancy Wright, Gainesville</i>
3:00 p.m. – 3:10 p.m.	Break
3:10 p.m. – 3:40 p.m.	Residents Rights (Nursing Home and ALF) <i>John Griffin, Sarasota</i>
3:40 p.m. – 4:10 p.m.	Age/Disability Discrimination <i>Michael Spellman, Tallahassee</i>
4:10 p.m. – 4:40 p.m.	Ethics in the Electronic Age <i>Twyla Sketchley, Tallahassee</i>
5:00 p.m. – 6:30 p.m.	Certification Review Boot Camp for Test Takers

SCHEDULE

DAY TWO: SATURDAY, JANUARY 19

7:50 a.m. – 8:20 a.m.	Late Registration and Continental Breakfast
8:20 a.m. – 9:00 a.m.	Guardianship and Incapacity Part 1 <i>Alex Cuello, Miami</i>
9:00 a.m. – 9:30 a.m.	Guardianship and Incapacity Part 2 <i>Victoria Heuler, Tallahassee</i>
9:30 a.m. – 10:00 a.m.	Power of Attorney <i>Howard Krooks, Boca Raton</i>
10:00 a.m. – 10:10 a.m.	Break
10:10 a.m. – 10:50 a.m.	Pre Mortem Legal Planning Part 1-Drafting Health Care Advanced Directives <i>Enrique Zamora, Miami</i>
10:50 a.m. – 11:20 a.m.	Pre Mortem Legal Planning Part 2-Tax Issues <i>Steve Kotler, Miami</i>
11:20 a.m. – 12:00 noon	Litigation for Elder Law Attorneys <i>Gerald Hemness, Brandon</i>
12:00 noon – 1:10 p.m.	Lunch
1:10 p.m. – 2:00 p.m.	Trust Administration and Updates <i>David Carlisle, Miami</i>
2:00 p.m. – 2:50 p.m.	Probate Homestead Elective Share and Updates <i>Steven Quinnell, Pensacola</i>
2:50 p.m. – 3:00 p.m.	Break
3:00 p.m. – 3:40 p.m.	Representing Fiduciaries <i>Rep Deloach, Seminole</i>
3:40 p.m. – 4:20 p.m.	Financial Products: LTC Insurance, Annuities & Reverse Mortgages <i>Jill Burzynski, Naples</i>

CLE CREDITS

CLER PROGRAM

(Max. Credit: 16.0 hours)

General: 16.0 hours
Ethics: 1.0

CERTIFICATION PROGRAM

(Max. Credit: 16.0 hours)

Elder Law: 16.0 hours
Real Estate Law: 1.0 hour
Tax Law: 0.50 hour
Wills, Trusts & Estates: 1.5 hours

Seminar credit may be applied to satisfy CLER / Certification requirements in the amounts specified above, not to exceed the maximum credit. See the CLE link at www.floridabar.org for more information.

Prior to your CLER reporting date (located on the mailing label of your Florida Bar News or available in your CLE record on-line) you will be sent a Reporting Affidavit if you have not completed your required hours (must be returned by your CLER reporting date).

THE REUNION RESORT

Experience the Reunion Resort Difference



Visitors have been making special Reunion Resort memories for years. From families spending time together at our water park to enjoying a relaxing weekend golf getaway, the Reunion Resort experience is quite different from other Orlando vacation experiences.

Accommodations will be in the Resort's all suite rooms.

The Reunion Resort is committed to delivering a first-class ex-

perience. If you have any questions, please contact the Resort at 407.662.1000. We look forward to seeing you soon.

RESERVATIONS: A block of room suites has been reserved at the **Reunion Resort**, at the rate of **\$189 single/double occupancy**. To make reservations, call the Reunion Resort directly at **(866) 880-8563**. **Reservations must be made by 12/27/12 to assure the group rate and availability.** After that date, the group rate will be granted on a "space available" basis.



ELDER LAW SECTION

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John Clardy, Crystal River — Chair-elect
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REFUND POLICY: A \$25 service fee applies to all requests for refunds. Requests must be in writing and postmarked no later than two business days following the live course presentation or receipt of product. Registration fees are non-transferrable, unless transferred to a colleague registering at the same price paid. Registrants who do not notify The Florida Bar by 5:00 p.m., Jan. 10, 2013 that they will be unable to attend the seminar, will have an additional \$80 retained. Persons attending under the policy of fee waivers will be required to pay \$80

TO REGISTER



ON-LINE:
www.floridabar.org/CLE



MAIL:
Completed form with check

REGISTRATION

Register me for the Elder Law Annual Update and Review Course.

ONE LOCATION: (345) REUNION RESORT, REUNION, FL (JANUARY 18-19, 2013)

TO REGISTER OR ORDER AUDIO CD / DVD OR COURSE BOOKS BY MAIL, SEND THIS FORM TO: The Florida Bar, Order Entry Department, 651 E. Jefferson Street, Tallahassee, FL 32399-2300 with a check in the appropriate amount payable to The Florida Bar or credit card information filled in below. If you have questions, call 850/561-5831. ON-SITE REGISTRATION, ADD \$25.00. **On-site registration is by check only.**

Name _____ Florida Bar # _____

Address _____ Phone: () _____

City/State/Zip _____ E-mail* _____

***E-mail address required to transmit electronic course materials and only used for this order.**

AJC: Course No. 1439R

ELECTRONIC COURSE MATERIAL NOTICE: Florida Bar CLE Courses feature electronic course materials for all live presentations, live webcasts, webinars, teleseminars, audio CDs and video DVDs. This searchable electronic material can be downloaded and printed and is available via e-mail several days in advance of the live presentation or thereafter for purchased products. Effective July 1, 2010.

REGISTRATION FEE (CHECK ONE):

- ☐ Member of the Elder Law Section: \$450
- ☐ Non-section member: \$500
- ☐ Full-time law college faculty or full-time law student: \$290
- ☐ Persons attending under the policy of fee waivers: \$80

Members of The Florida Bar who are Supreme Court, Federal, DCA, circuit judges, county judges, magistrates, judges of compensation claims, full-time administrative law judges, and court appointed hearing officers, or full-time legal aid attorneys for programs directly related to their client practice are eligible upon written request and personal use only, complimentary admission to any live CLE Committee sponsored course. Not applicable to webcast. (We reserve the right to verify employment.)

METHOD OF PAYMENT (CHECK ONE):

- ☐ Check enclosed made payable to The Florida Bar
- ☐ Credit Card (Advance registration only. Fax to 850/561-9413.)
 - ☐ MASTERCARD ☐ VISA ☐ DISCOVER ☐ AMEX

Exp. Date: ____/____ (MO./YR.)

Signature: _____

Name on Card: _____

Billing Zip Code: _____

Card No. _____

- ☐ Enclosed is my separate check in the amount of \$50 to join the Elder Law Section. Membership expires June 30, 2013.



- ☐ Please check here if you have a disability that may require special attention or services. To ensure availability of appropriate accommodations, attach a general description of your needs. We will contact you for further coordination.

COURSE BOOK — AUDIO CD — ON-LINE — PUBLICATIONS

Private recording of this program is not permitted. **Delivery time is 4 to 6 weeks after 01/19/13. TO ORDER AUDIO CD OR COURSE BOOKS**, fill out the order form above, including a street address for delivery. **Please add sales tax. Tax exempt entities must pay the non-section member price.** Those eligible for the above mentioned fee waiver may order a complimentary audio CD in lieu of live attendance upon written request and for personal use only.

Please include sales tax unless ordering party is tax-exempt or a nonresident of Florida. If this order is to be purchased by a tax-exempt organization, the media must be mailed to that organization and not to a person. Include tax-exempt number beside organization's name on the order form.

☐ **COURSE BOOK ONLY (14390M)**

Cost \$60 plus tax

(Certification/CLER credit is not awarded for the purchase of the course book only.)

TOTAL \$ _____

☐ **AUDIO CD (1439C)**

(includes electronic course material)

\$450 plus tax (section member)

\$500 plus tax (non-section member)

TOTAL \$ _____

Related Florida Bar Publications can be found at <http://www.lexisnexis.com/flabar/>