



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

Elder Law Annual Update and Review Course

COURSE CLASSIFICATION: ADVANCED LEVEL

ONE LIVE LOCATION – TWO DAYS

January 13-14, 2012 • Reunion Resort in Orlando • 7593 Gathering Drive
Reunion, FL 34747 • (407) 396-3180

Course No.1312R

FRIDAY – JANUARY 13, 2012

7:45 a.m. – 8:15 a.m.

Late Registration and Continental Breakfast

8:15 a.m. – 8:20 a.m.

Task Force Update

8:20 a.m. – 8:30 a.m.

Welcome and Introductions

Twyla Sketchley, Tallahassee

8:30 a.m. – 9:20 a.m.

Ethics and the Elder Law Attorney

*Rebecca Morgan and Roberta Flowers,
Stetson University College of Law*

9:20 a.m. – 10:10 a.m.

Pre-Mortem Planning

Genny Bernstein, Palm Beach Gardens

10:10 a.m. – 10:20 a.m.

Break

10:20 a.m. – 11:10 a.m.

Tax Issues for the Florida Lawyer

Martin Cohen, Pembroke Pines

11:10 a.m. – 11:30 a.m.

Health Care Advance Directives

Scott Solkoff, Delray Beach

11:30 a.m. – 12:00 noon

Nursing Home/Assisted Living Facility Torts

Scott Gwartney, Tallahassee

12:00 noon – 1:10 p.m.

Lunch (included in registration)

1:10 p.m. – 1:50 p.m.

Medicare

David Hook, New Port Richey

1:50 p.m. – 2:20 p.m.

Health Insurance & ACA

Linda Chamberlain, Clearwater

2:20 p.m. – 3:00 p.m.

Social Security Benefits

David Lillesand, Clearwater

3:00 p.m. – 3:10 p.m.

Break

3:10 p.m. – 3:50 p.m.

**Financial Products: LTC Insurance,
Annuities & Reverse Mortgages**

Jill Burzynski, Naples

3:50 p.m. – 4:40 p.m.

Probate, Elective Share & Homestead

Eric Virgil, Coral Gables

4:40 p.m. – 5:10 p.m.

Certification Study Tips

Jason Waddell, Pensacola

SATURDAY – JANUARY 14, 2012

7:45 a.m. – 8:15 a.m.

Late Registration and Continental Breakfast

8:15 a.m. – 8:20 a.m.

Task Force Update

8:20 a.m. – 8:30 a.m.

Welcome and Introductions

Twyla Sketchley, Tallahassee

8:30 a.m. – 9:20 a.m.

VA Benefits

Jack Rosenkranz, Tampa

9:20 a.m. – 10:10 a.m.

Medicaid

Emma Hemness, Brandon

10:10 a.m. – 10:20 a.m.

Break

10:20 a.m. – 11:10 a.m.

Guardianship & Incapacity

Victoria Heuler, Tallahassee

11:10 a.m. – 12:00 noon

Residents Rights (nursing home and ALF)

Aubrey Posey, Tallahassee

12:00 noon – 1:10 p.m.

Lunch (included in registration)

1:10 p.m. – 1:50 p.m.

Abuse, Neglect & Exploitation

Steve Quinnell, Pensacola

1:50 p.m. – 2:30 p.m.

Trust Administration

David Carlisle, Miami

2:30 p.m. – 3:00 p.m.

Administrative Advocacy

Nancy E. Wright, Gainesville

3:00 p.m. – 3:10 p.m.

Break

3:10 p.m. – 3:40 p.m.

Litigation for Elder Law Attorneys

Tracy Moya, Tallahassee

3:40 p.m. – 4:10 p.m.

Housing Options

Twyla Sketchley, Tallahassee

4:10 p.m. – 4:40 p.m.

Age/Disability Discrimination

Sara Caldwell, Daytona Beach

4:40 p.m. – 5:10 p.m.

Representing Fiduciaries

Rep DeLoach, Seminole

CLE CREDITS

CLER PROGRAM

(Max. Credit: 16.5 hours)

General: 16.5 hours

Ethics: 1.0 hour

CERTIFICATION PROGRAM

(Max. Credit: 16.5 hours)

Elder Law: 16.5 hours

Tax Law: 1.0 hour

Wills, Trusts & Estates: 3.5 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).

TO REGISTER



ON-LINE:

www.floridabar.org/CLE



MAIL:

Completed form with check



FAX:

Completed form to 850/561-9413

Register Now!

Elder Law Annual Update and Review Course

The Florida Bar
651 E. Jefferson Street
Tallahassee, FL 32399-2300

PRSRT-STD
U.S. POSTAGE
PAID
TALLAHASSEE, FL
Permit No. 43

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., January 5, 2012 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.

HOTEL RESERVATIONS: A block of rooms has been reserved at the Reunion Resort in Orlando at the rate of \$179 single/double occupancy. To make reservations, call the Reunion Resort directly at (407) 396-3180. Reservations must be made by 12/19/11 to assure the group rate and availability. After that date, the group rate will be granted on a "space available" basis.

Register me for the "Elder Law Annual Update and Review Course" Seminar

ONE LOCATION: (345) Reunion Resort in Orlando, Reunion, FL (Friday & Saturday, January 13-14, 2012)

TO REGISTER OR ORDER AUDIO CD 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 is required to receive electronic course material and will only be used for this order.*

AJC: Course No. 1312R

ELECTRONIC MATERIALS: Effective July 1, 2010, every CLE course will feature an electronic course book in lieu of a printed book for all live presentations, live webcasts, webinars, teleseminars, audio CDs and video DVDs. This searchable, downloadable, printable material will be available via e-mail several days in advance of the live course presentation or thereafter for purchased products. We strongly encourage you to purchase the book separately if you prefer your material printed but do not want to print it yourself.

REGISTRATION FEE (CHECK ONE):

- ☐ Member of the Elder law Section: \$340
- ☐ Non-section member: \$390
- ☐ Full-time law college faculty or full-time law student: \$235
- ☐ 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, 2012.



- ☐ 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 01/14/12. 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 (1312M)

Cost \$60 plus tax

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

TOTAL \$ _____

☐ AUDIO CD (1312C)

(includes Electronic Course Material)

\$340 plus tax (section member)

\$390 plus tax (non-section member)

TOTAL \$ _____

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

TO REGISTER



ON-LINE:
www.floridabar.org/CLE



MAIL:
Completed form with check



FAX:
Completed form to 850/561-5816

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HOTEL RESERVATIONS:

A block of rooms has been reserved at the _____ Hotel, at the rate of \$_____ single/double occupancy. To make reservations, call the _____ directly at (____) _____. Reservations must be made by ____/____/____ to assure the group rate and availability. After that date, the group rate will be granted on a "space available" basis.

REFUND POLICY:

Requests for refund or credit toward the purchase of the audio CD / DVD or course books of this program **must be in writing and postmarked** no later than two business days following the course presentation. Registration fees are non-transferrable, unless transferred to a colleague registering at the same price paid. A \$25 service fee applies to refund requests. **(OPTIONAL):** Registrants who do not notify The Florida Bar by 5:00 p.m., _____, 2010 that they will be unable to attend the seminar, will have an additional \$_____ retained. Persons attending under the policy of fee waivers will be required to pay \$_____.

COURSE BOOK, AUDIO CD, DVD, ON-LINE, PUBLICATIONS

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REGISTRATION

“ _____ ” **Seminar**

ONE LOCATION: (000) HOTEL, CITY ([Day, Date] _____, 2010)

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Name _____ Florida Bar # _____

Street Address _____ Phone: (____) _____

City/State/Zip _____ E-mail* _____

**E-mail address is required to receive electronic course material and will only be used for this order.*

_____ : **Course No.** _____ **R**

REGISTRATION FEE (CHECK ONE):

- ☐ Member of the _____ Section: \$ _____
- ☐ Non-section member: \$ _____
- ☐ Full-time law college faculty or full-time law student: \$ _____
- ☐ Persons attending under the policy of fee waivers: \$ _____

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.)

☐ **COURSE BOOK ONLY** Cost: \$50 plus tax (0000M)
(Certification/CLER credit is not awarded for the purchase of the course book only.)
TOTAL \$ _____

☐ **AUDIO CD (0000C)**
(includes electronic course material)
\$125 plus tax (section member)
\$150 plus tax (non-section member)
TOTAL \$ _____

☐ **DVD (0000D)**
(includes electronic course material)
\$250 plus tax (section member)
\$275 plus tax (non-section member)
TOTAL \$ _____

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

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.

☐ Enclosed is my separate check in the amount of \$ _____ to join the _____
_____ Section. Membership expires June 30, 2011

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- ☐ MASTERCARD ☐ VISA ☐ DISCOVER ☐ AMEX
____ (MO./YR.)

Exp. Date: ____/____/____

Signature: _____

Name on Card: _____ Billing Zip Code: _____

Card No. _____



☐ 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.