

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

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**Loews Portofino Bay Hotel, Orlando**

**Essentials of Elder Law (#1875)**

**~ LIVE PRESENTATION AND WEBCAST ~**

**COURSE CLASSIFICATION: INTERMEDIATE LEVEL**

**JANUARY 15, 2015**

**COURSE NO. 1875R**

**Elder Law Annual Update  
and Hot Topics (#1876)**

**~ LIVE PRESENTATION ~**

**COURSE CLASSIFICATION: ADVANCED LEVEL**

**JANUARY 16-17, 2015**

**COURSE NO. 1876R**

Due to popular request, this annual event has been extended to three days. An extra day has been added for "Elder Law Essentials for New Attorneys and Paralegals." The second and third days are for the "Annual Update" which will encompass more advanced topics and issues. A complete list of presentations can be found in this brochure. To register online visit: [www.Eldersection.org](http://www.Eldersection.org).

## LOEWS PORTOFINO BAY HOTEL

Nestled along a picturesque bay at Universal Orlando® Resort, this luxurious hotel recreates the charm and romance of the famed seaside village of Portofino, Italy, right down to the cobblestone streets and outdoor cafes. Guests enjoy impeccable and attentive service, the opulent Mandara Spa®, three themed swimming pools and eight restaurants and lounges. From the classically-inspired fountains and charming courtyards to the authentic music filling the piazza, Loews Portofino Bay Hotel enables guests to escape to the sunny shores of the Italian Riviera. Plus, as a deluxe on-site hotel guest you'll stay in the heart of the excitement at Universal Orlando Resort® and receive exclusive theme park benefits you won't receive staying anywhere else including: Universal Express<sup>SM</sup> unlimited ride access allowing you to SKIP THE REGULAR LINES in both theme parks all day — a FREE benefit worth up to \$89 per person, per day (valid theme park admission required) AND early park admission to Universal's Islands of Adventure®, one hour before the theme park opens (valid theme park admission required).



**RESERVATIONS:** A block of suites has been reserved at the **Loews Portofino Resort** at the rate of **\$189 single/double occupancy**. To make reservations, call the resort directly at **1-866-360-7395** or use **this link to register online:** <http://www.loewshotels.com/en/Portofino-Bay-Hotel/GroupPages/FI-Elder-Law>. **Reservations must be made by 12/26/14 to assure the group rate and availability.** After that date, the group rate will be granted on a "space available" basis.

### ELDER LAW SECTION

Jana McConnaughay, Tallahassee — Chair  
David Hook, New Port Richey — Chair-elect  
Sam Boone, Gainesville — CLE Chair

### FACULTY & STEERING COMMITTEE

David Hook, New Port Richey — Program Chair

## SCHEDULE – DAY 1

### Essentials of Elder Law

**COURSE CLASSIFICATION:  
INTERMEDIATE LEVEL**

**Live Presentation and Webcast:  
Thursday, January 15, 2015**

Course No. 1875R

7:45 a.m. – 8:10 a.m.	<b>Registration</b>
8:10 a.m. – 8:20 a.m.	<b>Welcome and Introductions</b>
8:20 a.m. – 9:00 a.m.	<b>Ethics</b> <i>Rebecca Morgan, Saint Petersburg</i> <i>Roberta Flowers, Saint Petersburg</i>
9:00 a.m. – 9:40 a.m.	<b>Elder Abuse</b> <i>Twyla Sketchley, Tallahassee</i>
9:40 a.m. – 10:30 a.m.	<b>Guardianship</b> <i>Enrique Zamora, Coconut Grove</i>
10:30 a.m. – 10:50 a.m.	<b>Break</b>
10:50 a.m. – 11:40 a.m.	<b>Pre-Mortem Legal Planning</b> <i>Eve Simmons, Port Saint Lucie</i>
11:40 a.m. – 12:30 p.m.	<b>Health and Personal Care Planning</b> <i>Collett Small, Pembroke Pines</i>
12:30 noon – 1:30 p.m.	<b>Lunch</b> (included in registration)
1:30 p.m. – 2:10 p.m.	<b>Essentials of Social Security Benefits</b> <i>Richard Culbertson, Orlando</i>
2:10 p.m. – 2:40 p.m.	<b>Essentials of Special Needs Trust</b> <i>Melissa Barnhardt, Fort Lauderdale</i>
2:40 p.m. – 3:00 p.m.	<b>Break</b>
3:00 p.m. – 3:50 p.m.	<b>Essentials of Veteran's Benefits</b> <i>Valerie Peterson, Huntington Bch., CA</i>
3:50 p.m. – 4:30 p.m.	<b>Financial Products (Long Term Care Insurance)</b> <i>Len Mondschein, Miami</i>
4:30 p.m. – 5:00 p.m.	<b>Break out Sessions:</b> <b>1. LGBT Planning</b> (not webcast) <i>Nicole Seymour, Fort Lauderdale</i> <b>2. Income, Estate and Gift Tax</b> <i>Michael Lampert, West Palm Bch.</i>
5:00 p.m. – 6:00 p.m.	<b>Reception</b>
6:00 p.m. – 7:30 p.m.	<b>Executive Council Meeting</b>

### CLE CREDITS

#### CLER PROGRAM

(Max. Credit: 8.5 hours)

General: 8.5 hours      Ethics: 1.0 hour

#### CERTIFICATION PROGRAM

(Max. Credit: 6.5 hours)

Elder Law: 6.5 hours

# SCHEDULE – DAYS 2 & 3

## Elder Law Annual Update and Hot Topics

**COURSE CLASSIFICATION: ADVANCED LEVEL**

**Live Presentation: Friday and Saturday, January 16 – 17, 2015**

Course No. 1876R

The Elder Law Annual Update and Review Course will cover hot topics within each topic of interest to an advanced Elder Law practitioner. Recent case law and statutory changes will be discussed, as will strategies for dealing with these changes successfully. Attendees will leave with a higher level of expertise and an enhanced ability to meet clients' 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.

### FRIDAY, JANUARY 16TH

7:40 a.m. – 8:00 a.m.

#### **Registration**

8:00 a.m. – 8:20 a.m.

#### **Welcome and Introductions**

8:20 a.m. – 9:10 a.m.

#### **Medicaid Part I: Planning and Strategies**

*Emma Hemness, Brandon*

9:10 a.m. – 10:00 a.m.

#### **Medicaid Part II: Case Law and Managed Care**

*Emma Hemness, Brandon*

10:00 a.m. – 10:20 a.m.

#### **Break**

10:20 a.m. – 11:10 a.m.

#### **Veteran's Administration**

*Valerie Peterson, Huntington Beach, CA*

11:10 a.m. – 12:00 p.m.

#### **Pre-Mortem Legal Planning-Tax Issues and Hot Topics**

*Michael Lampert, West Palm Beach*

#### **Questions and Answers with Morning Speakers (optional)**

12:00 noon – 1:00 p.m.

#### **Lunch (included in registration)**

1:00 p.m. – 1:50 p.m.

#### **Social Security**

*Richard Culbertson, Orlando*

1:50 p.m. – 2:30 p.m.

#### **Special Needs Trust-Hot Topics**

*Melissa Barnhardt, Fort Lauderdale*

2:30 p.m. – 3:30 p.m.

#### **Administrative Advocacy (including Managed Care Appeals)**

*Nancy Wright, Lake Worth*

3:30 p.m. – 3:40 p.m.

#### **Break**

3:40 p.m. – 4:10 p.m.

#### **Break Out: Marketing: Strategic Planning/Residents' Rights**

*Jennifer Campbell Goddard, Olathe, KS  
John Griffin, Sarasota*

4:10 p.m. – 4:20 p.m.

#### **Break**

4:20 p.m. – 4:50 p.m.

#### **Break out: Death Care/Housing**

*John Griffin, Sarasota*

*Phil Weinstein, Lake Worth*

4:50 p.m. – 5:20 p.m.

#### **Questions and Answers with Afternoon Speakers (optional)**

5:20 p.m. – 7:30 p.m.

#### **Reception**

### SATURDAY, JANUARY 17TH

8:00 a.m. – 8:20 a.m.

#### **Welcome and Introductions**

8:20 a.m. – 9:10 a.m.

#### **Guardianship: Updates and Hot Topics**

*Twyla Sketchley, Tallahassee*

9:10 a.m. – 10:00 a.m.

#### **Elder-Related Torts**

*Dean LeBoeuf, Tallahassee*

10:00 a.m. – 10:20 a.m.

#### **Break**

10:20 a.m. – 11:10 a.m.

#### **Litigation for Elder Law Attorneys**

*Hung Nguyen, Coral Gables*

11:10 a.m. – 12:00 p.m.

#### **Representing Fiduciaries**

*Steve Hitchcock, Clearwater*

12:00 noon – 1:00 p.m.

#### **Lunch (included in registration)**

1:00 p.m. – 1:50 p.m.

#### **Probate and Trust Administration: Hot Topics and Update**

*John Moran, West Palm Beach*

1:50 p.m. – 3:20 p.m.

#### **Certification Review Boot Camp**

*Jason Waddell, Pensacola*

## CLE CREDITS

### CLER PROGRAM

(Max. Credit: 15.0 hours)

General: 15.0 hours

Ethics: 0 hours

### CERTIFICATION PROGRAM

(Max. Credit: 15.0 hours)

Elder Law: 15.0 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](http://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).

**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. 8, 2015 that they will be unable to attend a seminar will have an additional \$40 (#1875) or \$90 (#1876) retained. Persons attending under the policy of fee waivers will be required to pay \$40 (#1875) or \$90 (#1876).



# REGISTRATION

## Essentials of Elder Law ~ and ~ Elder Law Annual Update and Hot Topics

**ONE LOCATION: (369) LOEWS PORTOFINO BAY HOTEL, ORLANDO (JANUARY 15-17, 2015)**

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 required to transmit electronic course materials and only used for this order.**

**AJC: Course No. 1875R & 1876R**

**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):	<b>"Essentials"</b> (Jan. 15 only) Course #1875	<b>"Update &amp; Hot Topics"</b> (2 days - Jan. 16 & 17) Course #1876	<b>"Essentials" #1875 and "Update &amp; Hot Topics" #1876</b>
Member of the Elder Law Section	<input type="checkbox"/> \$215 – Live	<input type="checkbox"/> \$395	<input type="checkbox"/> \$575
Non-section member	<input type="checkbox"/> \$265 – Live	<input type="checkbox"/> \$445	<input type="checkbox"/> \$700
Full-time law college faculty or full-time law student	<input type="checkbox"/> \$153	<input type="checkbox"/> \$268	
Paralegal (Not eligible for online registration)	<input type="checkbox"/> \$153	<input type="checkbox"/> \$268	
Persons attending under the policy of fee waivers	<input type="checkbox"/> \$40	<input type="checkbox"/> \$90	

**WEBCAST REGISTRATION:** Section Member \$265 - Non Section Member \$315 - To Register for the Essentials of Elder Law Webcast go online to: <http://tinyurl.com/FloridaBarCLE1875R>.

*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 (Fax to 850/561-9413.) ☐ MASTERCARD ☐ VISA ☐ DISCOVER ☐ AMEX Exp. Date: \_\_\_\_/\_\_\_\_(MO./YR.)

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.

☐ Enclosed is my separate check in the amount of \$50 to join the Elder Law Section. Membership expires June 30, 2015.

### COURSE BOOK — AUDIO CD — ON-LINE — PUBLICATIONS

Private recording of this program is not permitted. **Delivery time is 4 to 6 weeks after 01/15/15. TO ORDER AUDIO CD OR COURSE BOOKS**, fill out the order form above, including a street address for delivery. **Please add sales tax.**

*Please include sales tax unless ordering party is tax-exempt or a nonresident of Florida.*

COURSE #	COURSE BOOK	AUDIO CD — Section Member (includes electronic course materials)	AUDIO CD — NON-Section Member (includes electronic course materials)	(NOTE: Certification/ CLER credit is not awarded for the purchase of the course book only.)
1875	<input type="checkbox"/> \$60 plus tax	<input type="checkbox"/> \$215 plus tax	<input type="checkbox"/> \$265 plus tax	
1876	<input type="checkbox"/> \$60 plus tax	<input type="checkbox"/> \$395 plus tax	<input type="checkbox"/> \$445 plus tax	
(Orders must include applicable sales tax)			<b>ORDER TOTAL: \$</b> _____	

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