

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

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~ LIVE PRESENTATIONS ~

The Elder Law Annual Update and Hot Topics (#1712)

COURSE CLASSIFICATION: ADVANCED LEVEL

JANUARY 17 – 18, 2014

COURSE NO. 1712R

With a third day added for new Elder Law attorneys:

The Essentials of Elder Law for New Attorneys & Paralegals (#1713)

COURSE CLASSIFICATION: INTERMEDIATE LEVEL

JANUARY 16, 2014

COURSE NO. 1713R

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

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 ExpressSM 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 **\$169 single/double occupancy**. To make reservations, call the resort directly at **(407) 503-1000**. **Reservations must be made by 12/27/13 to assure the group rate and availability.** After that date, the group rate will be granted on a "space available" basis.

ELDER LAW SECTION

John Clardy, Crystal River — Chair
Jana McConnaughay, Tallahassee — Chair-elect
Collett Small, Pembroke Pines — CLE Chair

FACULTY & STEERING COMMITTEE

Jana McConnaughay, Tallahassee — Program Chair
Collett Small, Pembroke Pines
Stephanie Villavicencio, Miami
Jason Waddell, Pensacola
Brandon Arkin, Palm Beach Gardens

SCHEDULE – DAY 1

Essentials of Elder Law for New Attorneys and Paralegals

COURSE CLASSIFICATION:
INTERMEDIATE LEVEL

Live Presentation:
Thursday, January 16, 2013

Course No. 1713R

7:30 a.m. - 8:00 a.m.	Late Registration Continental Breakfast
8:00 a.m. - 8:20 a.m.	Welcome and Introductions
8:20 a.m. - 9:00 a.m.	Ethics <i>Rebecca Morgan and Roberta Flowers, Stetson Univ., St. Petersburg</i>
9:00 a.m. - 9:40 a.m.	Elder Abuse <i>Victoria Heuler, Tallahassee</i>
9:40 a.m. - 10:30 a.m.	Guardianships <i>Enrique Zamora, Miami</i>
10:30 a.m. - 10:40 a.m.	Break
10:40 a.m. - 11:30 p.m.	Pre-Mortem Legal Planning (Property) <i>Evelt Simmons, Port Saint Lucie</i>
11:30 a.m. - 12:20 p.m.	Health Care Decision Making <i>Vicki Bowers, Jacksonville</i>
12:20 p.m. - 1:20 p.m.	Lunch
1:20 p.m. - 2:00 p.m.	Social Security Benefits <i>David Lillesand, Clearwater</i>
2:00 p.m. - 2:40 p.m.	Special Needs Trust <i>Lauchlin Waldoch, Tallahassee</i>
2:40 p.m. - 2:50 p.m.	Break
2:50 p.m. - 3:40 p.m.	Veteran's Benefits <i>Valerie Peterson, Sisters, OR</i>
3:40 p.m. - 4:40 p.m.	Medicare/Medicaid <i>Heather Kirson, Orlando</i>
4:40 p.m. - 5:20 p.m.	Financial Products (Long Term Care Insurance) <i>Rob Cochran, Tampa</i> <i>Scott Vedder, Tallahassee</i>
5:20 a.m. - 5:45 p.m.	Post Mortem Issues <i>Phil Weinstein, Miami</i>

CLE CREDITS

CLER PROGRAM

(Max. Credit: 9.5 hours)

General: 9.5 hours Ethics: 1.0

CERTIFICATION PROGRAM

(Max. Credit: 7.0 hours)

Elder Law: 7.0 hours
Wills, Trusts & Estates: 7.0 hours

SCHEDULE – DAYS 2 & 3

Elder Law Annual Update and Hot Topics

COURSE CLASSIFICATION: ADVANCED LEVEL

Live Presentation: Friday and Saturday, January 17 – 18, 2014

Course No. 1712R

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 17TH

8:20 a.m. – 9:00 a.m.

Medicaid Part I: Planning and Strategies

Emma Hemness, Brandon

9:00 a.m. – 9:50 a.m.

Medicaid Part II: Case Law Administration and Managed Care

Heather Kirson, Orlando

9:50 a.m. – 10:20 a.m.

Affordable Care Act

Scott Solkoff, Delray Beach

10:20 a.m. – 10:30 a.m.

Break

10:30 a.m. – 11:20 a.m.

Veteran's Administration

Valerie Peterson, Sisters, OR

11:20 a.m. – 12:00 p.m.

Pre-Mortem Legal Planning—Tax Issues

Steve Kotler, Miami

12:00 p.m. – 12:20 p.m.

Task Force Update

Ellen Morris, Boca Raton

12:20 p.m. – 1:20 p.m.

Lunch

1:20 p.m. – 2:00 p.m.

Social Security

David Lillesand, Clearwater

2:00 p.m. – 2:30 p.m.

Special Needs Trusts

Lauchlin Waldoch, Tallahassee

2:30 p.m. – 3:00 p.m.

Administrative Advocacy (Including Managed Care Appeals)

Nancy Wright, Gainesville

3:00 p.m. – 3:10 p.m.

Break

3:10 p.m. – 3:40 p.m.

Residents' Rights (Nursing Home & ALF)

John Griffin, Sarasota

3:40 p.m. – 4:10 p.m.

Age/Disability Discrimination

Michael Spellman, Tallahassee

4:10 p.m. – 5:00 p.m.

Guardianship

Enrique Zamora, Miami

5:00 p.m. – 6:30 p.m.

Certification Review Boot Camp

Jason Waddell, Pensacola

SATURDAY, JANUARY 18TH

8:20 a.m. – 9:10 a.m.

Pre-Mortem Legal Planning – Wills, DOPA's, Health Care Advocacy Directives

Jacqueline Schneider, Coral Gables

9:10 a.m. – 10:00 a.m.

Elder-Related Torts

Scott Gwartney, Tallahassee

10:00 a.m. – 10:10 a.m.

Break

10:10 a.m. – 11:00 a.m.

Litigation for Elder Law Attorneys

Hung Nguyen, Coral Gables

11:00 a.m. – 11:50 a.m.

Trust Drafting and Administration

David Carlisle, Miami

11:50 a.m. – 12:30 p.m.

Representing Fiduciaries

Steve Hitchcock, Clearwater

12:30 p.m. – 1:30 p.m.

Lunch

1:30 p.m. – 2:20 p.m.

Probate, Homestead, Elective Share

John Moran, West Palm Beach

CLE CREDITS

CLER PROGRAM

(Max. Credit: 14.5 hours)

General: 14.5 hours

Ethics: 0 hours

CERTIFICATION PROGRAM

(Max. Credit: 14.5 hours)

Elder Law: 14.5 hours

Real Estate Law: 1.0 hour

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).

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, 2014 that they will be unable to attend a seminar will have an additional \$45 (#1713) or \$85 (#1712) retained. Persons attending under the policy of fee waivers will be required to pay \$45 (#1713) or \$85 (#1712).

REGISTRATION

Essentials of Elder Law for New Attorneys & Paralegals ~ and ~ Elder Law Annual Update and Hot Topics

ONE LOCATION: (369) LOEWS PORTOFINO BAY HOTEL, ORLANDO (JANUARY 16-18, 2014)

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. 1712R & 1713R

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):	"Essentials" (Jan. 16 only) Course #1713	"Update & Hot Topics" (2 days- Jan. 17 & 18) Course #1712
Member of the Elder Law Section	<input type="checkbox"/> \$230 – Live <input type="checkbox"/> \$350 – Webcast	<input type="checkbox"/> \$435
Non-section member	<input type="checkbox"/> \$280 – Live <input type="checkbox"/> \$400 – Webcast	<input type="checkbox"/> \$485
Full-time law college faculty or full-time law student	<input type="checkbox"/> \$163	<input type="checkbox"/> \$285
Paralegal (Not eligible for online registration)	<input type="checkbox"/> \$163	<input type="checkbox"/> \$285
Persons attending under the policy of fee waivers	<input type="checkbox"/> \$45	<input type="checkbox"/> \$85

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: _____

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☐ 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, 2014.

COURSE BOOK — AUDIO CD — ON-LINE — PUBLICATIONS

Private recording of this program is not permitted. **Delivery time is 4 to 6 weeks after 01/18/14. 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.)
1712	<input type="checkbox"/> \$60 plus tax	<input type="checkbox"/> \$435 plus tax	<input type="checkbox"/> \$485 plus tax	
1713	<input type="checkbox"/> \$60 plus tax	<input type="checkbox"/> \$230 plus tax	<input type="checkbox"/> \$280 plus tax	
(Orders must include applicable sales tax)			ORDER TOTAL: \$ _____	

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