



NAELA ONLINE ANNUAL CONFERENCE - 2024

Wednesday, 9/4 (Day 1)

- 2:00-2:15 p.m. Program Kick-Off: What to Expect; Housekeeping
- 2:15-3:15 p.m. **Invisible Disabilities: Can You See What I See?** (presented by Crystal West Edwards, CELA)
- This session will discuss general awareness of disabilities seen and unseen, ways to best serve this population in our offices and in our communities, and the ethical and legal obligations of attorneys who employ people with visible and invisible disabilities.
- 3:15-4:15 p.m. **Corporate Transparency Act (for all LLCs, Corporations, and LPs). Are the clients in compliance, and are you?** (presented by Deirdre Wheatley-Liss, CELA)
- The Corporate Transparency Act (in effect January 1, 2024) immediately imposes sweeping new disclosure duties when new entities are formed. For members who assist in entity formation and regulatory compliance, don't miss this session so that you can make plans to accommodate the additional steps the law will require to the entity formation process and avoid the \$500/day penalty.
- 4:15-4:30 p.m. **Networking Break**
- 4:30-5:30 p.m. **Deep Dive Into Dementia From the Eyes of a Medical Professional** (presented by Dr. Miguel Rivera)
- Gain valuable insight into dementia through the eyes of a medical expert, allowing for a deeper understanding of cognitive challenges and cognitive decline. Explore the physician's perspective, their role in patient/client care, and discover strategies for attorneys to provide enhanced assistance to clients facing dementia diagnoses.
- 5:30 p.m. **Program Wrap-up**

Friday, 9/6 (Day 2)

- 2:00-2:15 p.m. Day 2 Kick-Off
- 2:15-3:15 p.m. **Planning With Inherited IRAs in a SECURE World** (presented by Craig Reaves, CELA, CAP, Fellow)
- This session will review the current state of the law and provide a framework for understanding inherited IRAs after the SECURE Act, SECURE 2.0, and proposed regulations, whether an IRA is distributing to an individual or a trust. Learn how to provide accurate advice on the use and proper administration of inherited IRAs.
- 3:15-4:15 p.m. **Ethical Issues in Elder Law** (presented by Professor Roberta Flowers and Stu Zimring, CAP, Fellow)
- Explore ethical challenges in elder law as we navigate these issues through the lens of NAELA's Aspirational Standards, a fundamental aspect of NAELA membership. Join us for a thought-provoking session dedicated to upholding the highest ethical standards in elder law.
- 4:15-4:30 p.m. **Networking Break**
- 4:30-5:30 p.m. **Drafting for Special Needs Trusts: Ensuring True Intentions** (presented by Robert Fechtman, CELA)
- The black letters on a page and the real-life administration of special needs trusts often can turn out quite differently from one another. In this session, learn the best practices for drafting techniques to fulfill the grantor's true intent. Examples of how language can be too restrictive, not provide sufficient direction, or can be overly open-ended will be shared. This session also will discuss tactics for drawing out nuanced information from the grantors to discover the true intention for the grantor's loved one(s).

Tuesday, 9/10 (Day 3)

- 2:00-2:15 p.m. Day 3 Kick-Off
- 2:15-3:15 p.m. **Advanced Tax Issues in Pre- and Post-Mortem Planning** (presented by Hyman Darling, CELA, CAP, Fellow)
- This session includes an explanation of the income, estate, gift, and capital gain tax implications of estate planning, and how post-mortem tax planning can be used to reduce undesirable tax results.
- 3:15-4:15 p.m. **Case Law Update** (presented by Jennifer VanderVeen, CELA, CAP, Fellow)
- Join us for a session filled with legal insights and practical recommendations as NAELA Past Presidents dissect the most significant cases from the past year, offering expert commentary and invaluable practice suggestions in the field of elder law and special needs planning.
- 4:15-4:30 p.m. **Networking Break**
- 4:30-5:30 p.m. **Policy Changes Affecting Your Practice** (presented by Shari Polur, Esq.)
- Staying on top of legal, policy, and regulatory changes can be challenging but it is crucial for elder law attorneys. To that end, the chairs of NAELA's Federal Advocacy Committee will present public policy, regulatory, and legal hot topics that may affect NAELA members' practices.
- 5:30 p.m. **Program Wrap-up**