

2022 Annual Conference Virtual Edition Program Agenda

Tuesday, 8/16 (Day 1)

- 2:00-2:10 p.m. Program Kick-Off; What to Expect; Housekeeping
- 2:10-3:20 p.m. **When to Purchase Medicaid Compliant Annuity in the Institutionalized Spouse's Name** (presented by Dale Krause, J.D., LL.M)
When dealing with a married couple, it is easy to assume using a Medicaid Compliant Annuity in the name of the community spouse is the best option. However, you may be missing out on key opportunities to save your clients even more money. This presentation will explore an alternative annuity strategy for married couples. The speaker will explain the pros and cons of these different strategies, how to take advantage of more favorable beneficiary designation rules and illustrate the financial implications in a comparative case study.
- 3:20-3:25 p.m. **Break**
- 3:25-4:35 p.m. **Demystifying Death - How to Help Clients & Families Deal with Death** (presented by Brenna M. Galvin)
Focusing less on the legal planning and more on the person, this moderated session will include a discussion on how to approach fear of aging and dying, and sources of support for our clients and families.
- 4:35-4:45 p.m. **Networking Break**
- 4:45-5:55 p.m. **The Current Status of Retirement Benefits Planning After the SECURE Act** (presented by Mark Munson)
This session will include a discussion of retirement benefits planning to the passage of the SECURE Act for both disabled and non-disabled beneficiaries and planning options, including how to "stretch" the distribution period for non-disabled beneficiaries.
- 6:00 p.m. Networking Happy Hour

Friday, 8/19 (Day 2)

- 2:00-2:10 p.m. Day 2 Kick-Off
- 2:10-3:20 p.m. **Representing Clients with a Medicaid Administrative Appeals and/or Litigation** (presented by Patricia K. Dudek)
This session will discuss general procedures for assisting clients with a Medicaid administrative appeal and how to assist clients as expeditiously as possible with navigating the process. This session will distinguish strategies between financial

liability appeals, and appeals related to amount, duration, and scope of services. Alternative Dispute resolution will be touched on and potential ADA claims as well.

3:20-3:25 p.m.

Break

3:25-4:35 p.m.

Special Needs Planning - Updates and Practice Tips (presented by Letha McDowell and Jennifer VanderVeen)

This session will cover practice and tax planning tips for drafting first and third party SNTs; utilizing ABLE accounts, and pending changes in the law.

4:35-4:45 p.m.

Networking Break

4:45-5:55 p.m.

Paying for Long-Term Care (presented by Guy Matthews)

Many practitioners use Medicaid as a primary payer source for long-term care. With an increasingly challenging political landscape, rapidly increasing costs, and unchanged government funding, aging seniors need to explore alternatives to traditional public benefits. This discussion will include options to pay for care in addition to, and instead of Medicaid.

Tuesday, 8/23 (Day 3)

2:00-2:10 p.m.

Day 3 Kick-Off

2:10-3:20 p.m.

Qualifying Your Client for Public Housing (presented by Blaine Brockman)

To stay out of an institution, your client may need to qualify and remain eligible for public housing. Understand what options exist and how to properly plan in light of the Housing Opportunity Through Modernization Act of 2016.

3:20-3:25 p.m.

Break

3:25-4:35 p.m.

Trust Protectors - How to Provide Flexibility in Irrevocable Trusts (presented by Louis Pierro)

This session will focus on the benefits and drawbacks of naming a trust protector in Irrevocable Trusts, how to determine when it is appropriate, and how to determine who is best for the role (including the attorney)..

4:35-4:45 p.m.

Networking Break

4:45-5:55 p.m.

Tax Planning Strategies to Help Clients Save Money (presented by Eric Einhart)

This session will discuss the tax planning opportunities that can be uncovered when helping clients with estate and long-term care planning issues. This session will focus on reviewing the federal individual income tax return and issue spotting

for missed tax planning opportunities. Case studies and review of a 1040 will be included.

5:55 p.m.

Wrap Up