

Elder Law 2018: Preparing Clients for the Future

Cosponsored by the Elder Law Section

Register now at www.osbar.org/seminars (search for ELD18)



Friday, October 5, 2018

8:45 a.m.–4:30 p.m.

Multnomah Athletic Club

1849 SW Salmon Street, Portland

CLE credits: 4 General or Practical Skills, 1 Ethics, and 1 Abuse Reporting

By 2025, one in five Oregonians will be over age 65. Older clients need lawyers who understand the challenges they face, such as paying for long-term care, providing for loved ones, and ensuring that their plans for end-of-life care will be respected. This program provides the essential tools needed to analyze your clients' situations, answer their questions, and develop practical strategies to help them achieve their goals. Get up-to-date information about the eligibility requirements for key government benefit programs, including Medicaid for long-term care. Master the basic strategies used to protect the home and the spouse who does not need care. Identify ways to integrate ABLE accounts into planning for people with disabilities. Learn how Oregon's Advance Directive for Health Care is changing and how to increase its effectiveness from a health care provider's perspective. Explore the steps for preventing and avoiding ethical conflicts in common elder law scenarios, and enhance your ability to recognize and respond to elder or child abuse.

Elder Law Section members save \$20 off registration rates.

SCHOLARSHIPS

The Elder Law Section is offering up to three scholarships to cover the registration costs for newer lawyers to attend the in-person event at the Multnomah Athletic Club who might otherwise be unable to attend. Scholarships are available to OSB members in practice less than five years (as of July 31, 2018), with annual income less than \$50,000 (self-reported). Requests will be considered in the order received. Please submit a brief statement about your interest in elder law, together with your name, bar number, email address, and phone number to Anastasia Meisner, ameisner@samuelslaw.com, by September 21, 2018.

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LIVE EVENT



Early registration discount

Register by 10/1/18 and save \$20

- \$125 ONLD member
- \$180 Elder Law Section member
*(Enter coupon code **ELD18SM** at checkout to receive discount.)*
- \$200 OSB member
- \$210 Non-OSB member
- \$25 Plated lunch
- \$15 Print course materials
(Electronic materials are included with your registration.)

LIVE WEBCAST



- \$200 Webcast registration
(Includes online access to recorded seminar for 60 days after the live event.)



Questions or need help with registration?

Call the OSB CLE Service Center:
(503) 431-6413 or (800) 452-8260, ext. 413

50-Year and Active Pro Bono OSB members and Oregon judges and their lawyer staff – please call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413 to register for the live seminar.

7:30 Registration

8:40 Welcome

Kay Hyde-Patton, *CLE Committee Chair*

8:45 Government Benefit Programs Overview

- Social Security Retirement and Social Security Disability (SSDI)
- Supplemental Security Income (SSI)
- Medicare, Medicaid, and the Oregon Health Plan (OHP)
- Veterans' benefits

Darin Dooley, *Law Offices of Nay & Friedenbergl LLC, Portland*

9:45 Events that Affect Eligibility for Benefits

- Gifts and transfers for less than fair market value
- Inheritances and personal injury settlements
- Life changes
- Long-term care and spousal impoverishment protections: how events affect eligibility when the Medicaid recipient is married

Julie Nimnicht, *Law Offices of Geoff Bernhardt, Portland*

10:45 Break

11:00 ABLE Accounts

- Eligibility requirements
- Creating and funding
- Qualified disability expenses
- Tax considerations

Monica Pacheco, *Douglas Conroyd Gibb & Pacheco PC, Salem*

Noon Elder Law Section Annual Meeting

12:15 Lunch

1:15 Advance Directives Health Care Update

- New laws and forms
- Relationship to POLST (Physician's Orders for Life-Sustaining Treatment)
- Advising principals and health care representatives
- Real life hospital practices

Stephanie Carter, *Draneas & Huglin PC, Lake Oswego*

Melanie Maurice, *Oregon Health & Science University, Portland*

2:15 Predicting and Avoiding Conflicts of Interest

- Identifying your client(s)
- Developments that create conflicts
- Non-representation
- Drafting disclosure letters for potential conflicts

Allison Martin Rhodes, *Holland & Knight LLP, Portland*

3:15 Break

3:30 Elder and Child Abuse Reporting

- Recognizing elder and child abuse
- Mandatory reporting requirements for attorneys
- Protecting attorney-client privilege and confidentiality

Mark Johnson Roberts, *Oregon State Bar, Tigard*

4:30 Adjourn

Planning Committee

Kay Hyde-Patton, *Chair, Leahy Van Vactor Cox & Melendy LLP, Springfield*

Penny Davis, *Davis Pagnano McNeil & Vigna LLP, Portland*

Rebecca Kueny, *The Pixton Law Group, Lake Oswego*

Jennifer Kwon, *Kwon Law LLC, Tigard*

S. Jane Patterson, *Attorney at Law, Gresham*

Julie Meyer Rowett, *Yazzolino & Rowett LLP, Portland*

Mark M. Williams, *Gaydos Churnside & Balthrop PC, Eugene*

Products

ELD18.CD
Audio CDs with electronic materials \$200

ELD18.DVD
DVDs with electronic materials \$230

This seminar will be available on-demand after the live program. Please visit osbar.org/seminars and search for ELD18. On-demand access is available for 60 days after the date of purchase.

General Information

Cancellations: Cancellation requests must be received by the OSB CLE Service Center at least 72 hours prior to the date of the seminar to qualify for a refund. Refunds are subject to a \$25 cancellation fee.

Tuition Assistance: Email a request stating your financial situation to cle@osbar.org no later than one week before the seminar.

Dietary Restrictions or Accessibility Accommodations: Please call (503) 431-6375 or (800) 452-8260, ext. 375, at least 72 hours before the date of the seminar.



Upcoming Seminars

September 7

All Day PowerPlay (ADPP18)

Meet your CLE requirements with three seminars in one day that offer access to justice, ethics, and the new combined child and elder abuse reporting credits.

- Breaking Through Bias and Barriers: Exploring Access to Justice in the Legal Profession (BBB18)
- Your Time to Shine: An Oregon Lawyer's Duty to Report Elder and Child Abuse (AR218)
- Exit Row Ethics: What Rude Airline Travel Stories Teach About Attorney Ethics (ERE18)

September 12

Business Valuation and the Impact of the 2017 Tax Cuts and Jobs Act (BV18)

September 13

The State of the Union: *Masterpiece Cakeshop* and Other LGBT Law Developments (LGBT18)

Register now at www.osbar.org/seminars and search by program code.



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