While Oregon is following the national trend, driven by the aging baby boomer generation, Oregon’s 65-and-older population is growing faster than the nation’s as a whole. Explore the critical legal issues facing this population and gain essential tools to advise your clients on how to plan for their future. Master the basics of Supplemental Security Income for the elderly and persons with disabilities. Learn about Social Security rules for maximizing the Oregon Achieving a Better Life Experience (ABLE) savings plan. Discover the latest information on resources for veterans’ benefits, health care and nontraditional Medicaid plans, and health and wellness programs to consider for your clients. Gather information on issues related to physician-assisted death.

Elder Law Section members save $20 off registration rates.

The Elder Law Section has up to three (3) need-based registration scholarships for Elder Law Section members who are new attorneys or new to Elder Law to attend the in-person seminar. To apply, send your name, bar number, phone number, and a brief statement about your experience as an attorney and the need for a scholarship to: Anastasia Meisner, ameisner@samuelslaw.com by Sept. 5. Requests are considered in the order received. Please do not include any financial documentation or sensitive personal information with your scholarship request.

Questions or need help with registration? Call the OSB CLE Service Center: (503) 431-6413 or (800) 452-8260, ext. 413

Friday, October 4, 2019
8:30 a.m.–4:30 p.m.

Multnomah Athletic Club
1849 SW Salmon Street, Portland

CLE credits: 6.25 General

Register now at www.osbar.org/seminars (search for ELD19)

LIVE EVENT

Early registration discount
Register by 9/30/19 and save $20

$125  ONLD member
$180  Elder Law Section member (enter coupon code ELD19SM 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

Includes online access to recorded seminar for 60 days after the live event.

$125  ONLD member
$180  Elder Law Section member (enter coupon code ELD19SM at checkout to receive discount.)
$200  OSB member
$210  Non-OSB member

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

8:25 Welcome

8:30 Supplemental Security Income (SSI) Basics for the Elderly and Persons with Disabilities
- Preconditions for SSI eligibility
- Calculating eligibility and monthly SSI check amounts
- Resource and deeming rules

David Lillesand, Lillesand & Associates PA, Clearwater, FL

10:00 Break

10:15 Recent Developments in Oregon Elder Law
- Recent cases impacting elder law practice in Oregon
- 2019 legislative session bills
- Practice implications

Christopher Hamilton, McGinty Belcher & Hamilton Attorneys PC, Salem, OR
Tim McNeil, Davis Pagnano McNeil & Vigna LLP, Portland, OR

- Impact of new Program Operations Manual System (POMS) on creating and administering Special Needs Trusts

Allison Bren Ferris, CTFA, Wells Fargo, Seattle, WA
David Lillesand, Lillesand & Associates PA, Clearwater, FL
Melanie Marmion, Fitzwater Law LLP, Portland, OR

12:15 Elder Law Section Annual Business Meeting

12:30 Lunch

1:30 Achieving a Better Life Experience (ABLE) Accounts: Social Security Rules for Maximizing the Oregon ABLE Savings Plan
- ABLE accounts as alternatives to Special Needs Trusts (SNTs)
- Similarities and differences between ABLE accounts and SNTs
- ABLE as a valuable adjunct to SNTs

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

2:30 Additional Resources to Consider for Your Clients
- Health care and non-traditional Medicaid plans
- Veterans’ benefits
- Health and wellness programs
- Housing and utilities
- Financial assistance and food programs

Alana Hawkins, Pixton Law Group, Lake Oswego, OR
Rebecca Kueny, Kueny Law LLC, Salem, OR

3:30 Break

3:45 Social Security Administration Approval of Attorney Fees

David Lillesand, Lillesand & Associates PA, Clearwater, FL

4:30 Adjourn to hosted Welcome Reception with David Lillesand
Section Planning Committee

Kay Hyde-Patton, Chair, Leahy Cox LLP, Springfield
Jan Friedman, Disability Rights Oregon, Portland
Kathryn Gapinski, Gapinski Law LLC, Portland
Taylor Kittell, KG Law Group LLC, Portland
Julie Meyer Rowett, Yazzolino & Rowett LLP, Portland
Rebecca Kueny, Kueny Law LLC, Salem
S. Jane Patterson, Attorney at Law, Gresham
Mark M. Williams, Gaydos Churnside & Balthrop PC, Eugene
Brook Wood, Intelekia Law Group LLC, Portland

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) 431-6326 or (800) 452-8260, ext. 326, at least 72 hours before the date of the seminar.

Questions or need help with registration?
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