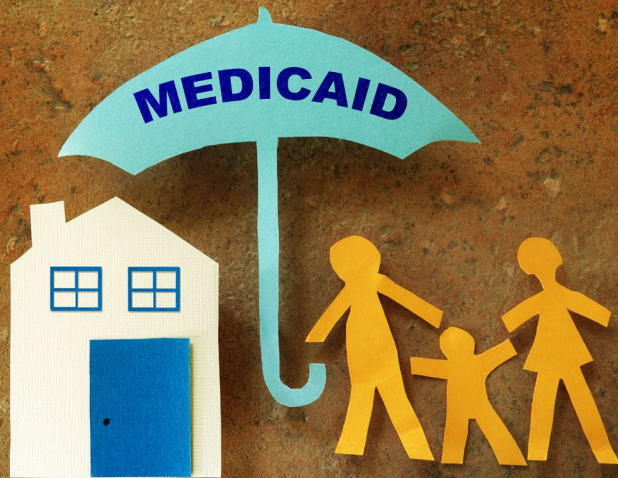


# Advanced Elder Law 2022—"Thinking Out Loud" (Ed Sheeran)

Cosponsored by the Elder Law Section

Register at [www.osbar.org/seminars](http://www.osbar.org/seminars) (search for ELDB22)



Delve into advanced elder law topics essential to your practice. Review planning strategies for Medicaid eligibility and estate recovery analysis. Learn about protection trusts and their tax planning considerations. Explore Medicaid eligibility for unmarried partners, estate planning with estate recovery in mind, and maintaining Medicaid eligibility after a triggering event.

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

**Scholarships:** The Elder Law Section has up to five (5) registration scholarships for Elder Law Section members who are newer attorneys or for newer attorneys interested in Elder Law. 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 Yu Meisner, [ameisner@samuelslaw.com](mailto:ameisner@samuelslaw.com) by September 30. Requests are considered in the order received. Please do not include any financial documentation or sensitive personal information with your scholarship request.

[Register for the LIVE WEBCAST](#)

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The Oregon State Bar requires that all attendees at in-person events sign and return a **Vaccination Attestation Form** prior to attending the event. Please complete the form in advance of the event (an electronic signature will suffice) and submit to the OSB CLE Service Center at [cle@osbar.org](mailto:cle@osbar.org).

**FRIDAY, October 7, 9 A.M.–3:45 P.M. PDT**

## IN-PERSON

Oregon State Bar Center  
16037 SW Upper Boones Ferry Rd., Tigard

or

## LIVE WEBCAST

CLE credits: 5.5 General

MCLE ID#: 92560



### In-Person Registration

- \$125 ONLD member
- \$180 Elder Law Section member
- \$200 OSB member
- \$210 Non-OSB member
- \$15 Box Lunch

*Electronic materials are included with your registration.*



### Live Webcast Registration

- \$125 ONLD member
- \$180 Elder Law Section Member
- \$200 OSB member
- \$210 Non-OSB member

*Webcast registration includes online access to the recorded seminar for 60 days after the event. Electronic materials are included with your registration.*

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 this seminar.



**Need help with registration, refunds, tuition assistance or accessibility accommodations?**

Call or email the OSB CLE Service Center:  
**(503) 431-6413 or (800) 452-8260, ext. 413**  
or [cle@osbar.org](mailto:cle@osbar.org)

***Please contact us at least 24 hours before the seminar for refunds and 72 hours before the seminar for accessibility accommodations.***

## Schedule

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**8:00 Continental Breakfast and Registration**

**9:00 “ABC” Advanced Planning Strategies (Jackson 5)**

- Advanced Medicaid eligibility
- Redetermination
- Estate recovery analysis
- Other advanced planning strategies

**Meredith Williamson**, *NW Estate Law LLC, Beaverton, OR*

**9:45 Transition**

**9:50 “Take Me Home, Country Roads” Asset Protection Trusts (John Denver)**

- Medicaid Asset Protection Trusts
- VA Asset Protection Trusts
- Tax planning issues

**Alana Hawkins**, *Kueny Law LLC, Salem, OR*  
**Mark Munson**, *Ruder Ware LLSC, Wausau, WI*

**10:35 Transition**

**10:40 “Don’t Stop Believing” Maintaining Eligibility After a Triggering Event (Journey)**

- Maintaining eligibility after a triggering event
- House sales post eligibility
- Death of a spouse
- Inheritance

**Darin Dooley**, *Draneas Huglin Dooley LLC, Lake Oswego, OR*

**11:25 Break**

**11:35 “Bridge Over Troubled Water” Dept. of Human Services v. Hobart (Simon & Garfunkel)**

- Breadth of *Hobart*: what we know and what we don’t know
- Estate planning with estate recovery in mind

**Garvin Reiter**, *Law Offices of Nay & Friedenberglc, Portland, OR*

**12:35 Lunch** (*Brown bags are welcome at the OSB Center or you may order a box lunch when registering.*)

**1:15 “Never Ending Math Equation” Elective Share (Modest Mouse)**

- How to calculate the elective share
- Who receives notice when it’s in the will (not a petition)
- Best practice—help!
- Post-Hobart

**Joel Smith**, *Jordan & Williams, LLC, Junction City, OR*

**2:00 Transition**

**2:05 “Changes” (Tupac)**

- Updates in Oregon Administrative Rules
- The Oregon Eligibility (ONE) system and applying for benefits

**Alejandra Klein**, *Attorney at Law, Portland, OR*  
**Rebecca Kueny**, *Kueny Law LLC, Salem, OR*

**2:50 Break**

**3:00 “Whenever I Call You Friend” Medicaid Eligibility for Unmarried Partners (Kenny Loggins)**

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

**3:45 Adjourn**

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## Planning Committee

**Rebecca Kueny**, *Planning Chair, Kueny Law LLC, Salem, OR*

**Megan Fuhrer**, *Attorney at Law, Fairview, OR*

**Kathryn Gapinski**, *Gapinski Law LLC, Portland, OR*

**S. Jane Patterson**, *Patterson Smith PC, Gresham, OR*

**Kay Hyde-Patton**, *Leahy Cox LLP, Springfield, OR*

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

**John Shickich**, *Fisher Investments, Camas, WA*

**Mark Williams**, *Jordan & Williams, Junction City, OR*