

Elder Law Basics: The Field of Dreams

Cosponsored by the Elder Law Section

Register at www.osbar.org/seminars (search for ELD23)



Friday, October 6, 2023

9 a.m.–4 p.m. PDT

Oregon State Bar Center

16037 SW Upper Boones Ferry Rd., Tigard
or Via Live Webcast

CLE credits: 3.5 General, 1 Ethics (Oregon Specific),
and 1 Mental Health / Substance Use (pending)

MCLE ID #: 103178

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Review the fundamentals of elder law topics essential to your practice. Learn about the basics of Medicaid eligibility, post eligibility planning, and issues in Medicaid. Explore your ethics requirements with regards to long-term care planning and representing incapacitated or soon-to-be incapacitated clients. Delve into mental health and substance use topics.

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

Special thanks to the Elder Law Section for sponsoring lunch for all in-person attendees.

Scholarships: The Elder Law Section has two need-based registration scholarships for Elder Law Section members who are new attorneys or new to Elder Law to attend this event. 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: Rachele Selvig, rselvig@davishearn.com by Monday, Sept. 25. Requests are considered in the order received. Please do not include any financial documentation or sensitive personal information with your scholarship request.



IN-PERSON EVENT

\$125	ONLD member
\$180	Elder Law Section member
\$200	OSB member
\$210	Non-OSB member
\$0	Box Lunch (section sponsored)



LIVE WEBCAST

\$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 the seminars.



Questions or need help with registration?

Call or email the OSB CLE Service Center:
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cle@osbar.org

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Schedule

8:15 Registration and Continental Breakfast

9:00 The Playing Field: Medicaid Eligibility 101

- Introduction to Medicaid eligibility rules
- Medicaid issue spotting and planning strategies

Mary Carlich, *Schmidt & Yee PC, Aloha*

Elizabeth Jessop, *Attorney at Law, Portland*

10:00 Transition

10:05 The Rule of Engagement: Issues in Medicaid

- Gifting
- Curing
- Life estates
- Exemptions
- Residences
- Annuities
- Sale contracts

Alana Hawkins, *Kueny Law LLC, Salem*

Rebecca Kueny, *Kueny Law LLC, Salem*

11:05 Break

11:15 Avoiding a Yellow or Red Card: Ethics and the ORPC

- Potential issues with Long-Term Care planning
- Representing incapacitated or soon-to-be-incapacitated clients

Amber Bevacqua-Lynott, *Buchalter, Portland*

12:15 Lunch (Sponsored by the Elder Law Section)

1:15 The Playbook: Eligibility

- Estate planning pre-eligibility
- Blended families
- Transfer of the house
- Modifying current estate plans vs. new

Ekua Hackman, *The Commons Law Center, Portland*

Anastasia Yu Meisner, *AY Meisner PC, Lake Oswego*

2:00 Transition

2:05 The Cool Down: Post Eligibility Planning

- Blended families
- Special Needs Trusts (SNTs)
- Single settlor/trustee
- Elective share

Shauna Newcomb-Haney, *Fitzwater Law, Portland*

Jennifer Smith, *Sherman Sherman Johnnie & Hoyt, Salem*

2:50 Break

3:00 Safety Protocol: Mental Health and Substance Abuse

- Increasing awareness of signs and symptoms of vicarious trauma, mental health conditions, and unhealthy stress
- Strategies to interact with clients experiencing trauma and address vicarious trauma, stress, and burnout
- Recent lawyer well-being research
- Helping to reduce the stigma associated with mental health and substance use

Vanessa Nordyke, *Executive Director of CASA, Salem*

4:00 Adjourn

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Planning Committee:

Megan Fuhrer, *Attorney at Law, Fairview, OR*
Kathryn Gapinski, *Gapinski Law LLC, Portland, OR*
John Hemmerich, *Myatt & Bell PC, Portland, OR*
Kay Hyde-Patton, *Leahy Cox LLP, Springfield, OR*
Rebecca Kueny, *Kueny Law LLC, Salem, OR*
Julie Meyer Rowett, *Yazzolino & Rowett LLP, Portland, OR*
John Shickich, *Fisher Investments, Camas, WA*
Mark Williams, *Jordan & Williams, Junction City, OR*

General Information

Cancellations: Cancellation requests must be received at least 72 hours prior to the date of the seminar to qualify for a refund. Refunds are subject to a \$25 cancellation fee. To cancel, please call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413.

Tuition Assistance: Email a request stating your financial situation to cle@osbar.org or call the OSB CLE Service Center at (503) 431-6413 or (800) 452-8260, ext. 413, 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.

Hotel Accommodations: Special rates starting at \$139 plus tax are available at The Grand Hotel at Bridgeport, 7265 SW Hazel Fern Rd., Tigard, OR 97224. Call 503-968-5757 / toll free 1-866-968-5757 and reference the Oregon State Bar rate or [click here](#) reserve online.

Products

ELD3.CD

Audio CDs with electronic materials..... \$200

This seminar will be available on-demand after the live program. Please visit www.osbar.org/seminars and search for ELD23. On-demand access is available for 60 days after the date of purchase.



Upcoming Seminars

September 29

Broadbrush Taxation: Tax Law for Non-Tax Lawyers
BBT23

October 12-13

Labor & Employment Law Annual Conference—
Finding a New Balance: Navigating the
Intersection of Business and Individual Workplace
Needs
EMP23