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.

Questions or need help with registration? Call or email the OSB CLE Service Center: (503) 431-6413 or (800) 452-8260, ext. 413, or cle@osbar.org
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
      Samantha Robell, The Reynolds Law Firm PC, Corvallis - TBD

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
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.

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