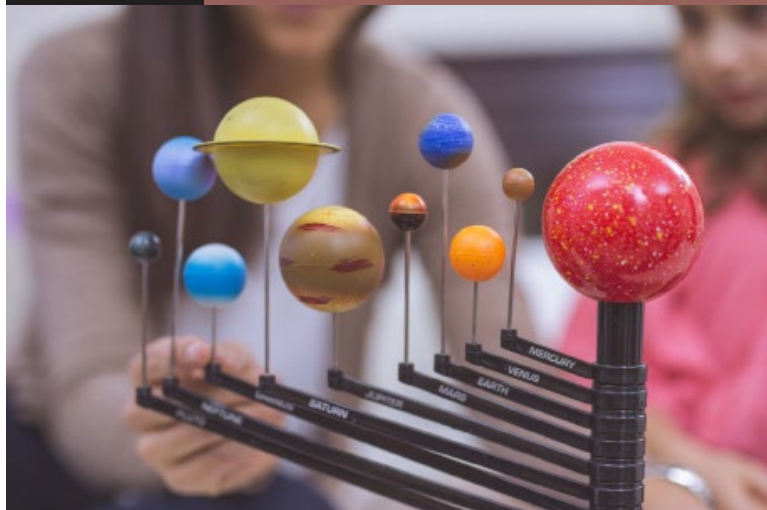


Elder Law: Special Needs Solar System

Cosponsored by the Elder Law Section

Register now at www.osbar.org/seminars (search for ELD24)



Friday, October 11, 2024

8:30 a.m.–2:35 p.m. PDT

Oregon State Bar Center

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

CLE credits: 4.75 General

MCLE ID #: 113973

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(search for ELD24)

Special Needs Trusts (SNTs) are an area of growing client and industry concern. Explore the administration of SNTs. Learn about leaving retirement assets to persons with disabilities and the nuts and bolts of financial planning for a special needs beneficiary. Delve into settlements and special needs planning and SSDI and Medicare.

For those observing Yom Kippur, the in-person seminar is scheduled to end prior to sundown on Friday, October 11. As an alternative to attending in-person, an archived seminar video is available for 60 days after the seminar by registering for the live webcast. Live webcast attendance is not required to receive access to the archived video.

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 three need-based registration scholarships for Elder Law Section members who are new attorneys (six or fewer years of practice) or are new to an elder law practice. 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. 30. 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)

Electronic materials are included with your registration.



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.



Closed captions available

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 seminar.



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

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Schedule

8:00 Registration and Continental Breakfast

8:30 The Administration of SNTs

- ABLE accounts with SNTs
- TrueLink
- Reporting to government agencies on onset
- Lay fiduciary guidelines

Stephanie Carter, *Hilary Carter Law, Tigard, OR*
Rebecca Kueny, *Kueny Law LLC, Salem, OR*

9:30 Transition Break

9:35 Nuts and Bolts of Financial Planning for a Special Needs Beneficiary

- Considerations for funding amount of SNT
- Considerations for non-disabled children
- Asset allocation vs. percentage based estate division

Alisha Langford, *Abeona Group, Portland, OR*

10:35 Break

10:55 Leaving Retirement Assets to Persons with Disabilities

- Navigate complexities of leaving retirement benefits to individuals with disabilities
- SECURE Act rules
- Taxation awareness
- Military Survivor Benefit Plan

Melanie Marmion, *Fitzwater Law, Portland, OR*

11:55 Lunch (*included with registration*)

12:45 Settlements and Special Needs Planning

- Medicare set-asides
- Structured settlements
- Red flags on settlement planning

Jack Meligan, *Settlement Professionals Inc., Portland, OR*

1:30 Transition Break

1:35 SSDI and Medicare

- Eligibility for Supplemental Security Insurance (SSI) and Social Security Disability Insurance (SSDI)
- Differences between SSI, SSDI, and SSA retirement
- Child disability benefits and how those benefits change when becoming an adult
- Intersection of SSI/SSDI and other needs-based benefits

Amanda Robichaux, *Northwest Disability Benefits LLC, Portland, OR*

2:35 Adjourn

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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

ELD24.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 ELD24. On-demand access is available for 60 days after the date of purchase.

Planning Committee

Stephanie Carter, *Hilary Carter Law, Tigard, OR*

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

Emily Goodwin, *Parker & Griffith PC, Salem, OR*

John Hemmerich, *Attorney at Law, Portland, OR*

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

Michelle Johansson, *Johansson Law LLC, Portland, OR*

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

John Shickich, *Fisher Investments, Camas, WA*

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



Upcoming Seminars

Save the Dates for Upcoming Fall Programs

October 18

Construction Law

October 25

Criminal Law

October 30

Labor and Employment Annual Conference—Essential Updates for Labor and Employment Practitioners