



National Academy of  
Elder Law Attorneys, Inc.

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**EARLY BIRD REGISTRATION AVAILABLE  
UNTIL OCTOBER 2, 2009.**



# **NAELA** *Doubleheader*

*Covering the Bases of Elder and Special Needs Law*

**Introduction to  
Special Needs and Elder Law**

— and —

**The Public Benefits and  
Guardianship Institute**

**NOVEMBER 5–8, 2009**

**HYATT REGENCY JERSEY CITY • JERSEY CITY, NEW JERSEY**

**Don't miss this unique opportunity to lay the foundation with the *Introduction to Special Needs and Elder Law* and pave the way to a more advanced program focusing specifically on *Public Benefits and Guardianship issues*.**

**Keep up with current developments.  
Visit [www.NAELA.org](http://www.NAELA.org).**



# NAELA Introduction to Special Needs and Elder Law and The Public Benefits and Guardianship Institute

*Covering the Bases of Elder and Special Needs Law*

**November 5–8, 2009**

**Hyatt Regency Jersey City • Jersey City, New Jersey**

The National Academy of Elder Law Attorneys is pitching a Doubleheader beginning with the Introduction to Special Needs and Elder Law Program and followed by the Public Benefits and Guardianship Institute. Both programs will be held at the Hyatt Regency Jersey City, across the river and with a tremendous view of the New York City skyline at half the cost! Registrants can participate in just one program or the entire Doubleheader. This is a unique opportunity to lay the foundation with the Introduction Program and pave the way to a more advanced program focusing specifically on Public Benefits and Guardianship issues.

## The Special Needs and Elder Law Line-Up

The first program, Introduction to Special Needs and Elder Law, has a terrific line-up of speakers and topics. Peter Strauss, a pioneer among Elder Law attorneys and one of NAELA's first four Fellows, will provide the keynote address on the past, present and future of Elder Law. Presenters include Charlie Sabatino (Elder Law Ethics); Eric Carlson (Nursing Home Issues); Thomas Begley Jr., Joanne Jeffries, and Ron Fatoullah (Medicaid Issues); Patti Dudek and Thomas Begley, Jr. (Special Needs Law and Trust Drafting); Larry

Frolik (Planning for Incapacity); Bill Brisk (Operating and Managing an Elder and Disability Law Practice); and Mary Alice Jackson and Ed Boyer (Representing a Client With Marginal Capacity). The program will have much to offer attendees who are new to Special Needs and Elder Law, as well as those wanting to expand their experience as Elder Law attorneys.

## Veteran's Administration General Session

A Veteran's Administration (VA) General Session will be offered on Saturday, November 7, 2009. VA benefits planning has expanded and many are incorporating this field into their practice, particularly in response to the recent downturn in the economy and its potential impact on the practice of Elder Law and to more comprehensively meet the needs of the population we serve. General CLE credits are being applied for; however, this session is also designed to satisfy the minimum three hours of continuing education required by the Department of Veterans Affairs within one year after receiving accreditation as a VA claims agent or attorney as well as the CLE hours required to maintain VA accreditation thereafter, thereby enabling those practitioners to formally represent clients before the VA. The Application for Accreditation as a Claims Agent or Attorney (VA Form 21a) may be found at [www.va.gov/vaforms/va/pdf/VA21a.pdf](http://www.va.gov/vaforms/va/pdf/VA21a.pdf) and confirmation of accreditation by the VA must be received prior to taking the session.

## Public Benefits and Guardianship Institute Tracks

The second program, the Public Benefits and Guardianship Institute, is designed to have two simultaneous tracks — a Public Benefits Track and a Guardianship Track. The Public Benefits Track is preceded by two excellent programs related to special needs planning and trusts (the Summer Special Needs Program and the Special Needs UnProgram) and, thus, it does not attempt to duplicate such efforts but rather educate on a broader range of public benefit issues, such as Medicare Part C, the use of reverse mortgages in Medicaid planning, Medicaid Home and Community Based Waiver programs, and more.

The Guardianship Track is the first NAELA has ever offered at one of its programs. You can expect to cover such issues as Guardianship and

Mediation, Contested Guardianships, Alternative to Guardianships, Functional vs. Medical Standards and Post-Incapacity, and Post-Mortem Public Benefits Planning. Playing the field for the second program include several renowned and well-respected practitioners, such as Vicki Gottlich, Shirley Whitenack, Cynthia Barrett, Professor Kim Dayton, Peter Strauss, and NAELA Past Presidents Bernard Krooks and Vincent Russo.

The program will close with a hot and timely topic, Health Care Reform, presented by those in the organization who are in the thick of things when it comes to public policy, and in anticipation that new federal legislation in this regard will have recently been enacted. This session is a must given the dramatic impact such reform will have on health insurance coverage and long-term care benefits, as well as Medicare and Medicaid, and will ensure that you are able to counsel your clients on what is current and on how health care reform will impact them personally.

Reserve your seat now for NAELA's 2009 Doubleheader. The program will provide both education and networking opportunities and is for both the newer and seasoned practitioner. For more information, please visit [www.NAELA.org](http://www.NAELA.org) or contact NAELA Director of Meetings and Education Casey Anderson, [canderson@naela.org](mailto:canderson@naela.org).



The **National Academy of Elder Law Attorneys, Inc.** (NAELA) is a non-profit association that assists lawyers, bar organizations and others who work with older clients, those with special needs, and their families. Established in 1987, NAELA provides a resource of information, education, networking, and assistance to those who deal with the many specialized issues involved with legal services to the elderly and people with disabilities.

The mission of the National Academy of Elder Law Attorneys is to establish NAELA members as the premier providers of legal advocacy, guidance and services to enhance the lives of people with disabilities and people as they age. NAELA sponsors this event to provide continuing education for new and experienced attorneys on the latest Elder and Special Needs Law issues.



**Nancy P. Gibson, Esq.**

Chair, Introduction to Special Needs and Elder Law Program



**Bridget O'Brien Swartz, CELA**

Co-Chair, Public Benefits and Guardianship Institute



**Kathleen (K.T.) Whitehead, CELA**

Co-Chair, Public Benefits and Guardianship Institute

# Introduction to Special Needs and Elder Law

## Schedule of Events

### WEDNESDAY, NOVEMBER 4, 2009

**12:00 p.m.–5:00 p.m.**

EXHIBIT DISPLAY SET UP

**10:00 a.m.–5:00 p.m.**

NAELA BOARD OF DIRECTORS MEETING

### THURSDAY, NOVEMBER 5, 2009

**9:00 a.m.–5:00 p.m.**

NAELA REGISTRATION DESK OPEN

**9:00 a.m.–5:00 p.m.**

NAELA EXHIBIT HALL OPEN

**9:00 a.m.–1:00 p.m.**

NAELA LAW STUDENT DAY

**11:00 a.m.–1:00 p.m.**

MEET AND GREET EXHIBITORS

**1:00 p.m.–2:30 p.m.**

 **WELCOME REMARKS AND KEYNOTE SESSION: ELDER LAW — PAST, PRESENT, AND FUTURE**

Included in Registration Fee  
Session Passes Available



Peter J. Strauss, a founding member of NAELA and one of the first class of members elected as Fellows in 1989, will talk about NAELA's history and achievements and the development of the Elder Law practice in the United States. Peter will comment on his view of what issues will occupy the time of Elder Law attorneys over the next 10 years and beyond.

#### TRACK LOGO KEYS



**Introduction to Special Needs and Elder Law Program**



**Public Benefits and Guardianship Institute**



**Public Benefits Track**



**Guardianship Track\***

\* Please note that all sessions in the Guardianship Track will be a 45-minute lecture, followed by a 30-minute workshop on the same topic.

Peter J. Strauss, JD, is a Senior Counsel in the Business Law practice in Epstein Becker & Green's New York office. Mr. Strauss has practiced trusts and estates law and estate and guardianship litigation since 1961, and has a particular knowledge of the legal problems of the aging and persons with disabilities. He was one of the first attorneys in the country to focus on what is now known as Elder Law.

**2:30 p.m.–2:45 p.m.**

VISIT WITH EXHIBITORS

**2:45 p.m.–4:00 p.m.**

 **GENERAL SESSION 2: OPERATING AND MANAGING AN ELDER LAW/DISABILITY PRACTICE**

Included in Registration Fee  
Session Passes Available  
*William J. Brisk, CELA*

After defining a successful practice, learn the skills needed to achieve success, describe ways to organize one's practice, recommend specific ways to keep track of cases, examine the means to achieve sustainable client development, and consider simple changes that can produce major results. Extensive materials will feature management forms that can be used immediately to transform your practice.

**4:00 p.m.–4:15 p.m.**

VISIT WITH EXHIBITORS

**4:15 p.m.–5:30 p.m.**

**BREAKOUT SESSIONS**

Included in Registration Fee  
Session Passes Available



**OVERVIEW OF MEDICAID**

*Ronald Fatoullah, CELA* 

How has the Deficit Reduction Act changed the Medicaid eligibility landscape? Life after the DRA continues, so knowing basic rules and planning techniques will assist you in navigating the Medicaid program.



**GUARDIANSHIP OVERVIEW**

*Catherine Anne Seal, JD, LLM, CELA*

Learn the basics of handling a guardianship and/or conservatorship case, from the initial intake/screening process, preparing and filing a petition, preparing for and attending the hearing to appoint the guardian and/or conservator, through the post-hearing process. Discussion on the duties and powers of guardians and conservators, use of limited guardianships and single transaction conservatorship, and the pros and cons of continuing representation post-appointment. Use of emergency appointment procedures will also be covered.



**OVERVIEW OF SOCIAL SECURITY DISABILITY AND SSI ELIGIBILITY: WHAT ALL ATTORNEYS SHOULD KNOW**

*Barbara R. Silverstone, JD, NOSSCR Staff Attorney*

Attorneys practicing in other areas of the law should know the basics of Social Security Disability law to advise their clients on potential eligibility and to insure that they are not doing anything that may jeopardize future eligibility for these benefits. This workshop will include an overview of the eligibility criteria for Social Security Disability and SSI benefits. Social Security benefits may be available to disabled adults, retirees and certain survivors. Supplemental Security Income may be paid to low-income disabled adults and children. Find out the criteria.

### FRIDAY, NOVEMBER 6, 2009

**7:00 a.m.**

NAELA'S CRAIG GORDON WALK

**8:00 a.m.–5:00 p.m.**

NAELA REGISTRATION DESK OPEN

**8:00 a.m.–5:00 p.m.**

NAELA EXHIBIT HALL OPEN

**8:00 a.m.–9:15 a.m.**

 **GENERAL SESSION 3: NURSING HOME ISSUES**

Continental Breakfast Included in Registration Fee

Session Passes Available

*Eric M. Carlson, Director of the Long-Term Care Project of the National Senior Citizens Law Center (NSCLC)* 



The Federal Nursing Home Reform Law sets high standards, but those standards too often are disregarded by nursing homes in their day-to-day practices. Attend this session to receive a broad introduction to the

Reform Law and learn how its provisions can be used to resolve common problems encountered by nursing home residents.



## STUDENT JOURNAL WRITING COMPETITION AWARD

Each year NAELA sponsors a Student Journal Writing Competition for currently enrolled law students. The top eight papers are published in the *NAELA Student Journal* and the authors receive a complimentary one-year student membership in NAELA. The first place winner also receives \$1,000 for travel and meeting-related expenses to attend the Doubleheader, where he or she will receive the prize.

## ELDER LEADERSHIP AWARD

NAELA's Elder Leadership Award will be presented during the Public Benefits and Guardianship Institute. Nominated by NAELA members, the recipient has made significant contributions to seniors on a national level in the form of sustained exemplary service, or as the result of an outstanding single achievement or public service.



### 9:15 a.m.–9:45 a.m.

#### VISIT WITH EXHIBITORS

### 9:45 a.m.–11:00 a.m.

#### BREAKOUT SESSIONS

Included in Registration Fee  
Session Passes Available



#### TOP TEN TAX TOPICS

Robert Anderson, CELA  
Hyman Darling, CELA

This "taxing" presentation will provide 10 relatively basic issues including income, estate, and gift taxes that every practitioner should have a working knowledge of in order to properly advise clients. Examples of each issue will also be presented.



#### OVERVIEW PLANNING FOR INCAPACITY/ POWER OF ATTORNEY

Lawrence A. Frolik, Professor of Law at the University of Pittsburgh School of Law 

The law assumes that adult individuals have the mental capacity to make rational decisions. If they do not, a substituted decision maker must

### TRACK LOGO KEYS



**Introduction to Special Needs and Elder Law Program**



**Public Benefits and Guardianship Institute**



**Public Benefits Track**



**Guardianship Track\***

\* Please note that all sessions in the Guardianship Track will be a 45-minute lecture, followed by a 30-minute workshop on the same topic.

be appointed for them in one of two ways. While they still have mental capacity, individuals can name an agent in a durable power of attorney. For those incapacitated persons who have not signed a durable power of attorney, the state, acting through the courts, may appoint a guardian or conservator. Discover best practices when creating durable powers of attorney and examine how state guardianship and conservatorship statutes operate.



#### MEDICAID FOR MARRIED PERSONS

Thomas D. Begley, Jr., CELA  
Jo-Anne Herina Jeffreys, Esq., CELA

One of the most important objectives of a Medicaid recipient is ensuring that the Community Spouse can maintain his or her standard of living. Explore all of the strategies available to protect the Community Spouse including spend down, conversion of countable assets to non-countable assets, and transfers of assets. Appeals for expansion of the minimum Monthly Maintenance Needs Allowance and Community Spouse Resource Allowance will also be discussed.

### 11:15 p.m.–12:30 p.m.



#### GENERAL SESSION 4: ETHICAL ISSUES IN ELDER LAW

Included in Registration Fee  
Session Passes Available  
Charles P. Sabatino, JD, Director of the ABA Commission on Law and Aging

Difficult professional ethical issues arise frequently in providing legal services to elderly clients, especially regarding capacity, identifying the client in the context of a family network, conflicts of interest, and confidentiality. Using a series of thought-provoking written vignettes, Mr. Sabatino will examine key ethical issues in Elder Law. The NAELA Aspirational Ethical Standards will also be introduced.

### 12:35 p.m.–1:50 p.m.



#### GENERAL SESSION 5: PLANNING FOR PERSONS WITH DISABILITIES

Lunch Included in Registration Fee  
Session Passes Available  
Patricia E. Kefalas Dudek, Esq.

Don't miss this complete overview of Special Needs Planning, including SNTs, Public Benefits Eligibility, and Special Needs Housing.

### 2:00 p.m.–3:15 p.m.

#### BREAKOUT SESSIONS

Included in Registration Fee  
Session Passes Available



#### ELDER FINANCIAL EXPLOITATION: FROM ASTOR TO UNDUE INFLUENCE

Lori Stiegel, JD, Senior Attorney, American Bar Association Commission on Law and Aging

Learn more about:

1. The types of financial exploitation, including power of attorney and guardianship abuse, sweetheart scams, and undue influence;
2. The extent and cost of the problem;
3. Victim characteristics and dynamics;
4. Risk factors, indicators, and the need for routine screening;

THURSDAY, NOVEMBER 5, 2009

## NAELA Law Student Day A Complimentary Introduction to Special Needs and Elder Law

### Nominate Your Students by September 25, 2009

NAELA is offering an invitation to attend a special Law Student Day on Thursday, November 5, 2009, at NAELA's Introduction to Special Needs and Elder Law Program.

Law Student Day begins with a breakfast and brief welcome by both new and experienced lawyers practicing in the field of Elder and Special Needs Law, followed by presentations from current NAELA members on the following topics:

- Elder Law and Private Practice
- Elder Law and Public Interest Practice
- Academics in Elder Law
- The Transition From Student to Elder Law Attorney

Students then have the opportunity to ask questions during a special panel discussion on topics ranging from legal issues to the practical aspects of securing a job in Elder and Special Needs Law.

Following a brief lunch at their own expense, students join lawyers at the Introduction to Special Needs and Elder Law program for a comprehensive overview of the many facets of Elder and Special Needs Law. All materials are provided free of charge to students via flash drive.

Students are invited to attend the Opening Reception on Friday evening. The cost is \$70 per person. Students can meet and network with Elder and Special Needs Law attorneys and other law students.

Because the bottom line is often the determinative factor for many law students, there is no cost to the selected students or nominating professor to attend the special Introduction to Special Needs and Elder Law sessions. **Space is limited to only 30 law students.** Reservations are taken on a first come, first serve basis. **In addition, a limited number of \$350 scholarships are available** to students who show a strong interest in the field of Elder and Special Needs Law. These scholarships will reimburse students for any out-of-pocket expenses associated with attendance to Law Student Day and/or registration for the full Institute program. For more information please contact Meredith Hansen, mhansen@naela.org or call 703-942-5711.

Save  
72%!

## Select sessions will be videotaped and available on NAELA's Online Education Library at a special discount for conference attendees only.

NAELA knows you're not always able to get to every session you'd like to attend. Select sessions will be videotaped and available for download from NAELA's Online Education Library following the event. As an additional benefit, conference attendees will be provided a coupon code for 72% off each seminar purchased.

Sessions will be available on [www.NAELA.org](http://www.NAELA.org), click on Events>Online Education Library.

5. Ethical issues;
6. Civil and criminal remedies; and
7. System change opportunities.



### DRAFTING OF SNTs

Thomas D. Begley, Jr., CELA

Gain knowledge of the types of Special Needs Trusts, including Third Party, First Party, and Pooled Trusts. Also gather information on the various public benefits programs that determine if a Special Needs Trust is utilized. Finally, drafting requirements, including the 2009 Revision to the POMS, will be discussed.



### OVERVIEW OF MEDICARE

Alfred J. Chiplin, Jr., JD, MDiv, CPE,  
Senior Policy Attorney with the Center for Medicare Advocacy, Inc.

This session will provide an introduction to the basics of Medicare, including coverage for persons under age 65. The session will begin with a 10-question Medicare true/false quiz to focus the discussion. Special topics will include rules for coverage of ambulance transport, obtaining durable medical equipment, understanding concepts of "home bound" for purpose of the Medicare home health benefit, and exploring problems and concerns about the Medicare Part B income-related premium applicable to higher income beneficiaries.

### 3:15 p.m.–3:45 p.m.

VISIT WITH EXHIBITORS

### 3:45 p.m.–5:00 p.m.

BREAKOUT SESSIONS

Included in Registration Fee  
Session Passes Available



### REPRESENTING CLIENTS WITH DIMINISHED CAPACITY: ETHICAL, LEGAL, AND PRACTICAL ISSUES

Edwin M. Boyer, Esq.   
Mary Alice Jackson, Esq.

Through the presentation of actual case studies and current research and case law, this panel will explore the practical, ethical, and legal issues involved in representing clients with diminished capacity in the Elder Law context. Specific topics will include formal and informal assessment of client capacity, legal vs. clinical capacity, what is dementia, legal standards of capacity, attorney liability in representing clients with diminished capacity, public benefits representation of clients with diminished capacity, working with non-elder law attorneys regarding their clients with diminished capacity, application of the Model Rules of Professional Responsibility, Rule 1.14, 1.6, and 1.3 in representing clients with diminished

capacity, role of the court-appointed attorney in guardianship cases, undue influence, mitigating and qualifying factors in affecting capacity, and ways to enhance capacity in clients.



### TAXATION OF SNTs

Sharon Kovacs Gruer, Esq., LLM, CELA   
Jennifer L. Vanderveen, CELA

A comprehensive overview on the taxation of supplemental needs trusts, including a review of tax reporting requirements, non-grantor trusts, grantor trusts, qualified disability trusts, gift tax, estate tax, income tax, and IRA benefits payable to an SNT.



### ROUNDTABLE DISCUSSIONS — OPEN FORUM

Working on a difficult case or just want to network with other professionals? This is an opportunity for informal discussions on issues of practice management and development, Elder Law, and Special Needs Law. Experienced NAELA members will be available to facilitate discussions based upon attendee interest.

## BRING YOUR STAFF TO THE GAME!

### NAELA has opened registration for the Introduction Program (only) to staff members (i.e. paralegals, associates, legal assistants, etc).

This program will provide a complete overview of Elder and Special Needs Law. Your staff will also be able to attend the three-hour VA session on Saturday, November 7, 2009.

Keep your staff up-to-date and register them now!

### 5:30 p.m.–8:00 p.m.



**2009 NAELA DOUBLEHEADER: RECEPTION**  
Included in Registration Fee  
Reception Tickets Available

Both programs are joining bullpens to enjoy networking and socializing. Be sure to introduce yourself to our First-Time Attendees and Law Students. Complimentary hors d'oeuvres will be served.

## SPECIAL THANKS

**Special Thanks to the 2009 NAELA Introduction to Special Needs and Elder Law Program Committee:**

**Nancy Gibson, Esq., Chair**  
Missoula, Mont.

**Vicki Gottlich (Benefits and Financing Section)**  
Washington, D.C.

**Jerry Hyman (Benefits and Financing Section)**  
Hockessin, Del.

**Derryl Molina (Young/New Attorneys Section)**  
San Jose, Calif.

**Mary Wanderpolo, CELA**   
Montclair, N.J.

**Special Thanks to the 2009 NAELA Public Benefits and Guardianship Program Committee:**

**Bridget O'Brien Swartz, CELA, Co-Chair (Public Benefits)**  
Phoenix, Ariz.

**Kathleen (KT) Whitehead, CELA**   
**Co-Chair (Guardianship)**  
San Antonio, Texas

**A. Jude Avelino (Trusts and SNTs Section)**  
New York, N.Y.

**Terry Berthelot (Health Care Section)**  
Mansfield, Conn.

**Margot Birke**  
Newburyport, Mass.

**Donald Chapin, CELA (Special Needs Law Section)**  
Hilliard, Ohio

**Patricia Elrod-Hill (Practice Management/Practice Development Section)**  
Norcross, Ga.

**Pam Keller (Advocacy/Litigation Section)**  
Punta Gorda, Fla.

**Sharon Rivenson Mark, CELA**   
Jersey City, N.J.

**Robert Martin (Tax Section)**  
Rapid City, S.D.

**Collier Moore (Benefits and Financing Section)**  
Springdale, Ark.

**Rene Reixach**  
Rochester, N.Y.

**Catherine Anne Seal, CELA**  
Colorado Springs, Colo.

**Shirley Berger Whitenack, Esq.**   
Morristown, N.J.

**Marta Williger, CELA**  
Munroe Falls, Ohio

# The Public Benefits and Guardianship Institute

## Schedule of Events

**SATURDAY, NOVEMBER 7, 2009**

**8:00 a.m.–5:00 p.m.**

NAELA REGISTRATION DESK OPEN

**8:00 a.m.–5:00 p.m.**

NAELA EXHIBIT HALL OPEN

**8:00 a.m.–11:30 a.m.**

 **GENERAL SESSION 1:  
VA SESSION**

Continental Breakfast Included in Registration Fee

Session Passes Available

*Michelle D. Beneski, Esq., VA Accredited Attorney*  
*Sanford (Sandy) J. Mall, JD, CELA, VA Accredited Attorney*

This course is for the attorney who has registered with the Department of Veterans Affairs (VA) and has received his or her accreditation letter from the Veteran's Administration. The course is designed to satisfy the three hours of continuing legal education required by the VA within one year after receiving accreditation. The course will cover representation before the VA, claims procedures, basic eligibility for VA benefits, right to appeal, disability compensation (38 U.S.C. Chapter 11), dependency and indemnity compensation (38 U.S.C. Chapter 13), and pension (38 U.S.C. Chapter 15).

### TRACK LOGO KEYS



**Introduction to Special Needs and Elder Law Program**



**Public Benefits and Guardianship Institute**



**Public Benefits Track**



**Guardianship Track\***

\* Please note that all sessions in the Guardianship Track will be a 45-minute lecture, followed by a 30-minute workshop on the same topic.

**8:00 a.m.–9:15 a.m.**



**ALTERNATIVES TO GUARDIANSHIP:  
CAN GUARDIANSHIP BE AVOIDED?**

Continental Breakfast Included in Registration Fee

Session Passes Available

*Paul R. Kietzman, General Counsel, NYSARC, Inc.*

*Robert P. Mascali, Associate General Counsel, NYSARC, Inc.*

Innovative practices will be offered that can be used to avoid the need for a formal guardianship for an individual with developmental disabilities. The panel presentation will be followed by a workshop-style directed discussion led by panel members and leaders from the Guardianship/ Capacity Section.

**9:15 a.m.–9:45 a.m.**

VISIT WITH EXHIBITORS

**9:45 a.m.–11:00 a.m.**



**MENTAL HEALTH AND GUARDIANSHIP**

*Fay Blix, CELA* 

*John J. Ford, Neighborhood Legal Services*  
*Sheila Shea, New York Appellate Division*

The intersection of Guardianship and Mental Health procedures can be a challenging situation. How does a practitioner coordinate the two procedures — care for the incapacitated person and assist the family? The panel presentation will be followed by a workshop-style directed discussion led by panel members and leaders from the Guardianship/ Capacity Section.

**11:30 a.m.–12:15 p.m.**



**EXHIBITOR NETWORKING LUNCHEON**

Lunch Included in Institute Registration Fee  
Lunch Tickets Available

Come and enjoy networking with all of NAELA's Exhibitors and Sponsors. Learn how their products and services can assist you in being more successful.



**12:15 p.m.–1:30 p.m.**



**WELCOME REMARKS  
GENERAL SESSION 2:**

**CLIFTON B. KRUSE, JR. ETHICS  
LECTURE — LEGAL ETHICS  
MAYBERRY STYLE**

Included in Institute Registration Fee  
Session Passes Available

Each year NAELA hosts this ethics lecture in honor of former member and founder Clifton B. Kruse, Jr. The delivery of this lecture focuses on Elder and Special Needs Law Ethics and Professionalism.



M. Keith Branyon focuses his practice on estate planning, probate, guardianship, and tax law. He is an experienced litigator in probate, trust and guardianship disputes, has recently published *Texas Probate — Forms and Procedure* (James Publishing, 2008), and is a frequent CLE speaker. He is a Fellow of the American College of Trust and Estate Council and is certified by the Texas Board of Legal Specialization in Tax Law and in Estate Planning and Probate Law.

The lecture will illustrate the Model Rules of Professional Conduct with clips from the "Andy Griffith Show."

**1:30 p.m.–1:45 p.m.**

VISIT WITH EXHIBITORS

**1:45 p.m.–3:00 p.m.**

**BREAKOUT SESSIONS**

Included in Registration Fee  
Session Passes Available



**REVERSE MORTGAGES, MEDICAID,  
AND TAXES**

*Bernard A. Krooks, CELA*  
*Vincent J. Russo, JD, LLM, CELA* 

Two of NAELA's finest attorneys will investigate the income tax consequences of reverse mortgages, intended deductions, and treatment of reverse mortgages under Medicaid.



## INCOME ONLY TRUSTS TO QUALIFY FOR PUBLIC BENEFITS

Evan H. Farr, CELA  
Jerry A. Hyman JD, LLM

Public Benefits are resources, just like assets, income and insurance are used to pay for long-term care and preserving one's home. Learn how irrevocable Income-Only Trusts can coordinate and maximize public benefits, as part of a legal and financial plan, to achieve such goals.



## MEDIATION AND GUARDIANSHIP: PART 1

Kim Dayton, Esq., Professor of Law at the William Mitchell College of Law   
Rob Eichelbaum, Adjunct Professor at St. Mary's University School of Law  
Lawrence M. Grosberg, Professor of Law at New York Law School  
Robert J. Rhudy, JD, President and Executive Director of Senior Mediation and Decision-Making, Inc.

Guardianship mediation could be the next big thing in dispute resolution. What's all the fuss about? This panel will address such matters as what is guardianship mediation, when it is appropriate, regulation (or lack thereof) of guardianship mediators, and what special ethical concerns can arise in guardianship mediation cases. Guardianship mediation programs in a number of jurisdictions including Alaska, New York, and North Carolina will also be described. The panel presentation will be followed by a workshop-style directed discussion led by panel members and leaders from the Guardianship/Capacity Section.

**3:00 p.m.–3:30 p.m.**

VISIT WITH EXHIBITORS

**3:30 p.m.–4:45 p.m.**

BREAKOUT SESSIONS

Included in Registration Fee  
Session Passes Available



## MEDICARE MYTHS

Alfred J. Chiplin, Jr., JD, MDiv, CPE, Senior Policy Attorney, Center for Medicare Advocacy, Inc.  
Vicki Gottlich, JD, LLM, Senior Policy Attorney, Center for Medicare Advocacy, Inc.  
Judith Stein, JD, Executive Director, Center for Medicare Advocacy, Inc.

Too frequently, misunderstandings and misinformation bar Medicare coverage and necessary health care. This session will discuss the myths and realities of Medicare coverage. We will debunk various inappropriate barriers to coverage and care, including the all-encompassing "Improvement Standard," which constantly blocks access for people with long-term conditions, the notion that Medicare home care is only for short periods, the perceived limitations of Medicare hospice coverage, and the limited, but nonetheless, often under utilized Medicare nursing home benefit. Real client examples and practical tips will be included in the discussion.

Save 72%!

## Select sessions will be videotaped and available on NAELA's Online Education Library at a special discount for conference attendees only.

NAELA knows you're not always able to get to every session you'd like to attend. Select sessions will be videotaped and available for download from NAELA's Online Education Library following the event. As an additional benefit, conference attendees will be provided a coupon code for 72% off each seminar purchased.

Sessions will be available on [www.NAELA.org](http://www.NAELA.org), click on Events>Online Education Library.



## MEDICAID HOME AND COMMUNITY BASED WAIVERS UPDATE

Gene Coffey, National Senior Citizens Law Center  
Morris Klein, CELA 

Waiver programs are becoming more popular and attorneys need to know how such programs work. Attend this session to stay ahead of the trend.



## MEDIATION AND GUARDIANSHIP: PART 2

Kim Dayton, Esq., Professor of Law at the William Mitchell College of Law   
Rob Eichelbaum, Adjunct Professor at St. Mary's University School of Law  
Lawrence M. Grosberg, Professor of Law at New York Law School  
Robert J. Rhudy, JD, President and Executive Director of Senior Mediation and Decision-Making, Inc.

Continuation of Mediation and Guardianship: Part 1. The panel presentation will be followed by a workshop-style directed discussion led by panel members and leaders from the Guardianship/Capacity Section.

**5:00 p.m.**

EVENING ON OWN

**SUNDAY, NOVEMBER 8, 2009**

**8:00 a.m.–1:00 p.m.**

NAELA REGISTRATION DESK OPEN

**8:00 a.m.–12:00 p.m.**

NAELA EXHIBIT HALL OPEN

**8:00 a.m.–9:15 a.m.**

BREAKOUT SESSIONS

Continental Breakfast Included in Registration Fee  
Session Passes Available



## THE WHYS AND WHEREFORES OF QUALITY IMPROVEMENT REVIEWS OF COURTS AND PUBLIC GUARDIANSHIP PROGRAMS

Vicki Alkire, NMG, CPHQ, LHCRM, CMC, Viable Alternatives, President of National Guardianship Association  
Gail Falk, Director, Vermont Office of Public Guardian  
Sally Hurme, JD, Senior Project Manager, AARP, National Guardianship Board of Directors  
Patricia Randolph, Chief Register Delaware Chancery Courts

The National Guardianship Association has recently conducted Quality Improvement Reviews of the Vermont Office of Public Guardian and of the guardianship procedures of the Delaware Chancery Courts. Members of the review teams and of the offices reviewed will discuss why they requested the reviews, how the reviews were conducted, and what are their anticipated benefits.



## BENEFITS & FINANCING SECTION: MEDICARE PART C ADVANTAGE PROGRAM

Vicki Gottlich, JD, LLM, Senior Policy Attorney, Center for Medicare Advocacy, Inc.  
Dina Wizmur, JD

Medicare C (Advantage) Plans are becoming more common. Clients are confused, providers are confused. Find out how to know when your client is covered by an Advantage Plan, how to get a copy of the Plan document, what to look for, and how to advocate to make sure your client gets all the benefits he or she is entitled to receive.



## PUBLIC BENEFITS PLANNING POST GUARDIANSHIP

Donna R. Bashaw, CELA   
Donald D. Vanarelli, CELA   
Marta J. Williger, JD, CELA

Explore ways and means for guardians to plan for public benefits on behalf of their wards. Topics will include court sanctioned transfers of assets, challenges of dealing with public agencies and procedures for seeking out appropriate public benefits. The panel presentation will be followed by a workshop-style directed discussion led by panel members and leaders from the Guardianship/Capacity Section.

**9:15 a.m.–9:30 a.m.**

VISIT WITH EXHIBITORS

**9:30 a.m.–10:45 a.m.**

BREAKOUT SESSIONS

Included in Registration Fee  
Session Passes Available



## MIDGTs vs. SPAs

Timothy P. Crawford, CELA   
Learn the best way to protect your home from the high cost of nursing home care. How to do it without a tax bill for your children if the property is sold? How to keep control of your house yet have it protected? Trust (MIDGT) or life estate (SPA), which to use? If you use a life estate, couple it with a retained special power of appointment to keep even greater control.

Register online at [www.NAELA.org](http://www.NAELA.org) 7

## ATTENTION EXHIBITORS AND SPONSORS!

Exhibiting at the 2009 NAELA Doubleheader provides you with two programs for the price of the one. You will have direct contact with over 300 attorneys and other professionals who recommend or make the final purchasing decision about the products and services you provide. For more information on how you can exhibit or sponsor, contact Casey Anderson at NAELA, 703-942-5711, or by e-mail at [canderson@naela.org](mailto:canderson@naela.org). A copy of the exhibitor prospectus is available online: go to [www.NAELA.org](http://www.NAELA.org) and click the Events tab at the top of the page.



### FAIR HEARINGS AND APPEALS: MAKING THE RECORD FOR STATE COURT REVIEW OR BRINGING A FEDERAL COURT CASE INSTEAD

Sharon Rivenson Mark   
Rene Reixach, Esq.  
Shirley Berger Whitenack, Esq. 

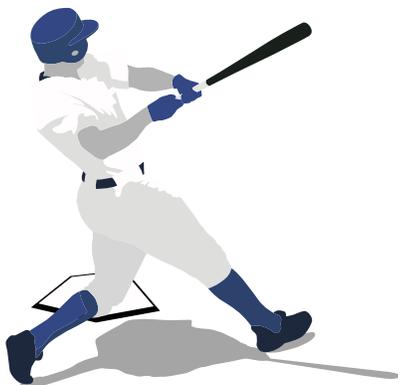
Gain knowledge of tools you will need to represent clients in fair hearings and to create records for appeals in state courts. Participants will also learn when to file an action in federal court instead of going through the state administrative procedures.



### STANDARD OF PROOF: MEDICAL MODEL OR FUNCTIONAL MODEL

Carolyn Byrne, Esq.  
Catherine Anne Seal, CELA  
Peter J. Strauss, JD  
Edward E. Zetlin, Esq.

States that have modernized their guardianship statutes have adopted a "least restrictive alternative" approach, authorizing the guardian to exercise only those powers that are necessary to perform functions the incapacitated person is unable to handle, and providing greater protection of the alleged incapacitated person's civil rights. Among those rights is the patient's privilege to have his or her medical records not be disclosed and used as proof of incapacity. States that recognize the patient-physician privilege have been described as having a standard of proof known as the "medical model," allowing for the appointment of a guardian by establishing the functional deficiencies of the alleged incapacitated person through non-medical testimony. Other states



allow — and in some cases require — medical testimony in determining capacity, including the alleged incapacitated person's treating physician, to be used in guardianship proceedings, an approach known as the "medical model." This program will discuss the appropriateness of the two approaches and whether they are consistent with the best interests of the alleged incapacitated person. The panel presentation will be followed by a workshop-style directed discussion led by panel members and leaders from the Guardianship/ Capacity Section.

**10:45 a.m.–11:00 a.m.**

VISIT WITH EXHIBITORS

**11:00 a.m.–12:15 p.m.**

BREAKOUT SESSIONS

Included in Registration Fee  
Session Passes Available



### FEDERAL LITIGATION ON MEDICAID ISSUES

William J. Browning, CELA  
Aytan Bellin, Esq.  
John W. Callinan, CELA  
Kemp Scales, Esq., CELA

Don't miss this update on the status of the leading litigation cases pending concerning "rule of halves gifts" and spousal planning involving DRA Promissory Notes, DRA Annuities, and Partial Cures. The "never-ending penalty," where the state refuses to start a penalty period but imposes a penalty when an individual transfers assets and applies for HCBS, will also be discussed.



### CONTESTED GUARDIANSHIPS: SWORD AND SHIELD

Cynthia L. Barrett, CELA   
Shirley Berger Whitenack, Esq. 

While many family members initiate guardianships to protect an alleged mentally incapacitated person, some are motivated by a desire to control a relative and his or her assets. This session will focus on litigation techniques and ways to improve the life of the incapacitated person, preempt fights and chaos, and improve post-mortem positions through contested guardianships. The panel presentation will be followed by a workshop-style directed discussion led by panel members and leaders from the Guardianship/Capacity Section.

**12:00 p.m.–4:00 p.m.**

EXHIBITOR TEAR DOWN

**12:30 p.m.–1:45 p.m.**



### GENERAL SESSION #3: HEALTH CARE REFORM 2009: HOW IT WILL CHANGE MEDICARE, MEDICAID, AND LONG-TERM CARE

Included in Registration Fee  
Session Passes Available  
Moderator: Brian W. Lindberg, MMHS, NAELA  
Public Policy Consultant  
Gene Coffey, National Senior Citizens Law Center  
Vicki Gottlich, JD, LLM, Senior Policy Attorney,  
Center for Medicare Advocacy, Inc.  
Charles P. Sabatino, JD, Director of the ABA  
Commission on Law and Aging

This panel of "inside the beltway" law and aging advocates will provide an up-to-the-minute review of health care reform proposals and how they will change critical programs serving special needs and older clients.

## 2009–2010 NAELA BOARD OF DIRECTORS

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# Registration Information

## SAVE \$100! Early Bird Registration Until October 2, 2009!

### Parking

The Hyatt Regency has Valet Parking only and costs \$32 overnight (in and out privileges) until 5:00 p.m. the following day. They offer daily valet parking for \$25 per day (until 11:00 p.m.).

**Driving Directions to Hyatt Regency Jersey City from Newark Liberty International Airport:** Start out going North. Merge onto I-78 E toward I-95/New Jersey Turnpike/US-1 and 9N (Portions toll). Take the exit toward Jersey City/Columbus Drive. Stay straight and go onto Center St. Turn Right onto Christopher Columbus Drive. Turn Right onto Hudson St. End at 2 Exchange Place.

### Airport Information

Newark Liberty International Airport (EWR) is an international airport about 15 miles southwest of Midtown Manhattan (New York City). The airport is operated by the Port Authority of New York and New Jersey, which also manages the two other major airports in the New York/New Jersey metropolitan area, John F. Kennedy International Airport (JFK) and LaGuardia Airport (LGA).

Newark is the 10th busiest airport in the United States and the nation's fifth busiest international air gateway; JFK ranks first. Newark Liberty is the second-largest hub, after George Bush Intercontinental Airport in Houston, for Continental Airlines, which is the airport's largest tenant (operating all of Terminal C and part of Terminal A). Primarily due to this large hub operation, Continental Airlines is by far the leading carrier in the New York market.

### Transportation

Transportation is readily available in Jersey City with a 24-hour PATH Train service, the NJ Transit, the NY/NJ Waterway, the Hudson-Bergen Light Rail system, and major highways such as the NJ Turnpike.

#### AirTrain – NJ Transit [www.njtransit.com](http://www.njtransit.com)

An easy and convenient way for you to travel to and from Newark Liberty International Airport.

- When you fly into the airport, after claiming your baggage, you can board AirTrain to connect with NJ TRANSIT to take you to Newark-Penn Station (here you will want to connect to the PATH Train). Check a NJ TRANSIT train

- departure monitor in any of the airport terminals (A, B, or C) to determine which train to take to your destination or to make appropriate connections.
- You can purchase a ticket from one of the ticket vending machines (TVMs) at the Newark International Airport Station. TVMs accept credit cards, debit cards, or U.S. currency only.
- If you are traveling to the airport and plan to return via AirTrain and NJ TRANSIT, we recommend that you purchase two one-way tickets prior to departing from your boarding station.
- Fares: When you buy a NJ TRANSIT to or from Newark Liberty International Airport Station, that one ticket includes the AirTrain Newark portion: \$5.50. Children under age 5 ride for free. You must use the ticket twice — regardless of which direction you're traveling. You'll need to show the ticket to the conductor on the NJ TRANSIT and you'll need the ticket to pass through the fare line at Newark Liberty International Airport Station. Be sure to take the ticket with you.
- Please note that the NJ Transit does not run from the airport station between the hours of 2:00 a.m.–4:30 a.m. If your flight arrives after the Newark Liberty International Airport Station has closed for the evening, you will need to take alternate ground transportation to your final destination.

#### PATH Train [www.panynj.gov](http://www.panynj.gov)

The PATH Train will take you from Newark-Penn Station to the front door of the Hyatt Regency Jersey City at Exchange Place.

- When you arrive at Newark-Penn Station, you can purchase a ticket for the PATH Train.
- Once aboard the PATH train, take it to the 4th stop (Exchange Place).
- Fares run \$1.75 per one-way ride. Multiple rides are also available.
- Travel time to the Hyatt is approximately 20 minutes, with service 24 hours a day, seven days a week.
- For those of you who wish to visit Midtown Manhattan or Hoboken, the PATH Train at Exchange Place will take you to both of these destinations. From here you can take the subway system anywhere you wish.

#### The New York City Subway [www.njnyrails.com/mta](http://www.njnyrails.com/mta)

The New York City Subway is a wonderful system which spreads across Manhattan, Brooklyn, Queens, and The Bronx. The MTA also operates the Staten Island Railways.

#### Hudson-Bergen Light Rail [www.mylightrail.com](http://www.mylightrail.com)

With fares at \$1.90 per ride, this rail system travels through Jersey City, Weehawken, Hoboken, Union City, and North Bergen.

### Jersey City, New Jersey

Some cities are known for their landmark attractions, for their action-packed nightlife, or simply for the unmatched quality of their community. Today, all of these elements and more have come to define Jersey City. From the Greenville neighborhood to the bustling Downtown area, the City is engulfed in a blanket of diversity and growth. Moreover, a fast-expanding skyline, a collection of schools, and an integrated transportation system help to make Jersey City a top contender among the cities that line the Hudson River. Boasting one of the most diverse populations in the United States, Jersey City is host to an array of ethnicities and cultures. Living up to its legacy as a Tapestry of Nations, the City is composed of substantial communities of Jewish, Italian, Cuban, Filipino, Polish, Indian, Irish, Puerto Rican, Dominican, African, Arab, and Asian decent. With the historic Ellis Island within its borders, it is not surprising that Jersey City has become renowned for her diversity. Jersey City's ideal location and close proximity to New York City has also contributed to the development of its own impressive skyline. Nothing beats knowing Jersey City than experiencing it yourself. For more information visit <http://www.cityofjerseycity.com>.

### Hotel Information

**Hyatt Regency Jersey City**  
**Two Exchange Place**  
**Jersey City, New Jersey 07302**



Hyatt Regency Jersey City on the Hudson provides elegant accommodations and easy access to New York City. This Jersey City hotel is a quick ferry or PATH train ride to Lower Manhattan's financial district and mid-town shops, theatres, and museums. The hotel offers stunning skyline views and a full-service business center. Savor contemporary American cuisine at the in-house restaurant as you gaze out at the Hudson River and Statue of Liberty.

To book your reservation, contact the Hyatt Regency Jersey City at 800-233-1234 and reference NAELA to receive our special conference rate starting at \$179.00 per night plus tax. Reservations are on a first-come, first-serve basis and cannot be guaranteed after Friday, October 9, 2009. Be sure to make your reservations early!

**Shuttles** [www.rideflyreservations.com](http://www.rideflyreservations.com)

Several shuttle services transport from the airport to nearby hotels. It is recommended that you book your shuttle service in advance. Depending on traffic, the travel time could be lengthy.

**Taxis:** Taxi service is available from the Newark Liberty International Airport. Locate the Taxi area from the baggage claim. Please note that most taxis will charge an airport service fee. Depending upon traffic, the travel time could be lengthy.

## Rental Cars



When you rent from NAELA Member Partner Hertz, you can take advantage of

a 10-15% discount off Hertz rates. In addition, special car rental rates are available during the NAELA Doubleheader. Daily, weekly, and weekend rates are available in Newark, New Jersey, starting one week before through one week after NAELA's Doubleheader. Advance reservations are suggested and can be easily made by calling Hertz toll-free at 1-800-654-2200 or online at [www.hertz.com](http://www.hertz.com). Be sure to mention that you will be attending the NAELA Doubleheader in Jersey City, New Jersey, and refer to NAELA's CDP# 1673984 and the PC#121472. With Hertz you not only get a low rate, you also get the great services that make Hertz #1, including computerized driving directions, emergency road service, express return, the Hertz #1 Club and an opportunity to join Hertz #1 Club Gold Service.

## Weather/Convention Attire

In November, you can expect weather with average highs of 51° F and average lows around 45° F. *Reminder:* Personal comfort varies widely so be sure to bring a sweater or jacket along with you during sessions.

## NAELA Member Registration, Additional Meal, and Guest Ticket Information

Registration for the 2009 NAELA Doubleheader is open to both NAELA members and non-members. **Register on or before October 2, 2009, to take advantage of the early-bird registration discount of \$100 off the regular price.** On-site registrations (including any received after October 2, 2009) will pay the regular registration price. Full registration fees include entrance to all educational sessions, the opening reception, meals, and a USB Drive of conference materials. Printed materials are also available for purchase. Additional meal/guest tickets are required for your guests and may be purchased with your registration.

## Refund Policy

No refunds will be issued after October 2, 2009. Cancellations after October 2, 2009, will receive a USB Drive of the materials. Cancellations before that date will receive a refund minus a \$100 administrative fee. Substitutions are welcome. Changes or cancellations must be made in writing to the NAELA office.

## Session Passes

### \$50 per session

Separate Registration Required

NAELA is extending ticket sales for individual sessions of your choice. These tickets can be used by attendees, guest, and day-pass participants that may not want to attend the entire conference, but just select sessions. This price does not include meals that may be provided. Meal tickets can be purchased at an additional cost.

## Optional Event

NAELA is not hosting an Optional Event during these programs due to the proximity of Midtown Manhattan and many nearby activities. NAELA wants participants and guests to experience the sights, sounds, arts and entertainment of the local area. Such activities include Times Square, 5th Avenue Shopping, Empire State Building, Statue of Liberty, Rockefeller Center, World Trade Center, Circle Line Cruises, museums, shows, zoos, restaurants, and bars.

## Conference Materials

NAELA will not distribute complimentary printed program materials to attendees. NAELA is committed to minimizing our impact on our environment as well as keeping the costs as low as possible for attendees.

All registered attendees will receive a complimentary USB Drive containing all outlines and materials for the program(s) that they have registered for in the registration packet.

Registrants (at own expense) can print selected pages from the USB Drive on-site at the Business Center.

Printed program materials can be ordered and provided to you on-site for an additional cost of \$150 per set per program or \$250 for the entire Doubleheader.

Please remember to bring your laptop battery charger to avoid losing power during the conference. A "laptop re-fueling station" will be set-up in the exhibitor area, along with designated tables in the General Session rooms for participants to plug-in their laptops.

## Continuing Legal Education (CLE) Credit Information

NAELA will apply for CLE (including ethics) credits in all applicable states. The appropriate forms and information will be available at the conference.

### 3 Easy Ways to Register

- 1. By Mail to:**  
2009 NAELA Doubleheader  
1577 Spring Hill Road Ste 220  
Vienna, VA 22182
- 2. By Fax to:**  
703-563-9504
- 3. On-Line at:**  
[www.NAELA.org](http://www.NAELA.org)

## SAVE THE DATES!

For more information visit  
[www.NAELA.org](http://www.NAELA.org).

### 2010 NAELA UnProgram

January 21-23, 2010

NELF UnProgram — January 20-21, 2010  
Embassy Suites — Outdoor World  
Grapevine, Texas  
Reservations: 1-972-724-2600 ext 3030

### 2010 NAELA Special Needs Conference

February 2010

Location: TBD

### 2010 NAELA Annual Meeting

May 11-17, 2010

Orlando, Fla.

### 2010 NAELA Institute

Oct/Nov 2010

Location: TBD

### 2009-2010 NAELA Elder Law Telephonic Training

Visit [www.NAELA.org](http://www.NAELA.org) to register now!  
Click on Events > Online Education Library.

### Client Confidentiality Issues

September 16, 2009

Presented by: Nancy P. Gibson

### Health Care Reform: It's Impact on Older Adults and The Practice of Elder Law

September 30, 2009

Presented by: Gene Coffey, Esq., Staff Attorney, National Senior Citizens Law Center  
Vicki Gottlich, JD, LLM, Senior Policy Attorney, Center for Medicare Advocacy  
Charles Sabatino, JD, Director, American Bar Association Commission on Law and Aging

### How to Best Protect Your Home from Nursing Home Costs

October 8, 2009

Presented by: Timothy P. Crawford, CELA 

### How to use GCMs in an Elder Law Practice

SNTs and Guardianships

October 21, 2009

Presented by: Richard A. Courtney, CELA and Kathleen Whitehead, CELA

### VA Benefits

November 17, 2009

Presented by: Rick Law

### Planning to Reduce Estate/Guardianship Litigation

December 2, 2009

Presented by: Wendy H. Sheinberg, CELA

### The Uniform Power of Attorney Act: Coming to a State Near You

January 13, 2010

Presented by: Andrew Hook, CELA

NATIONAL ACADEMY OF ELDER LAW ATTORNEYS

NAELA 2009 NAELA Doubleheader

November 5-8, 2009

Hyatt Regency Jersey City • Jersey City, N.J.

REGISTRATION FORM

NAELA OFFICE USE ONLY

Amt \$ \_\_\_\_\_

Type \_\_\_\_\_

Date \_\_\_\_\_

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SAVE \$100! Early Bird Registration Available until October 2, 2009!

Name \_\_\_\_\_ Nickname (for Badge) \_\_\_\_\_

Business Name \_\_\_\_\_ Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail: \_\_\_\_\_ Is this your first time attending a NAELA program?  Yes

Preferred method for receiving an acknowledgment of registration:  E-mail  Fax

NAELA Doubleheader Registration Fees

SAVE \$100!

On/Before 10/2/09 After 10/2/09

NAELA DOUBLEHEADER (BOTH PROGRAMS)

- NAELA Member \$595 \$695
LSC/Title III Attorney \$395 \$495
Nonmembers\* \$795 \$895

\*(Nonmember Attorneys can receive a \$100 credit if they become NAELA Members with 90 days of the program.)

NAELA INTRODUCTION PROGRAM (ONLY)

- NAELA Member \$300 \$400
NAELA Member Staff \$300 \$400
LSC/Title III Attorney \$200 \$300
Nonmembers\* \$400 \$500
Non-NAELA Member Staff \$400 \$500

NAELA PUBLIC BENEFITS AND GUARDIANSHIP INSTITUTE (ONLY)

- NAELA Member \$395 \$495
LSC/Title III Attorney \$295 \$395
Nonmembers\* \$495 \$595

TOTAL REGISTRATION FEE \$ \_\_\_\_\_

NAELA LAW STUDENT REGISTRATION FEE

- Law Student Day (Thursday, 11/5/09) Complimentary
Intro. to Special Needs and Elder Law \$125 \$225
Public Benefits and Guardianship Institute \$225 \$325

TOTAL REGISTRATION FEE \$ \_\_\_\_\_

NAELA Law Student Day Donations

NAELA is accepting donations to offset the cost for Law Student Day. Please indicate amount of donation in space provided. \$ \_\_\_\_\_

Printed Program Materials

Conference materials will be complimentary in USB format. If you wish to receive the printed manual on-site, indicate the quantity below.

- NAELA Doubleheader Materials (\$250)
NAELA Introduction Program Materials (\$150)
NAELA Public Benefits and Guardianship Materials (\$150)

Session Pass

Session passes can be purchased for individual sessions should you not be able to attend the entire conference or for guests and spouses.

# of tickets at \$50 each per session \$ \_\_\_\_\_

Refund Policy

No refunds will be issued after October 2, 2009; however, cancellations will receive a USB drive of the materials. Cancellations before October 2 will receive a refund minus a \$100 administrative fee.

Important Information

VA Session: Please check the box if you intend to participate in the VA Session. It is included in the registration fee.

Guardianship Track: Please check the box if you intend to participate in the Guardianship Track during the Institute. It is included in the registration fee.

Public Benefits Track: Please check the box if you intend to participate in the Public Benefits Track during the Institute. It is included in the registration fee.

Meal Tickets for Guests

All meals are included in each program registration fee (Law Students excluded). Meal tickets can be purchased for guests and session pass participants.

Guest Name (for badge): \_\_\_\_\_

Breakfast: # of tickets at \$45 each \$ \_\_\_\_\_

Lunch: # of tickets at \$55 each \$ \_\_\_\_\_

Opening Reception: # of tickets at \$70 each \$ \_\_\_\_\_

Total Meal Tickets \$ \_\_\_\_\_

Total Amount Enclosed: \$ \_\_\_\_\_

Payment Information

Please complete the registration form and return with a check payable to NAELA or charge below to:  VISA  MC  AMEX

Exp. Date \_\_\_\_\_

Signature \_\_\_\_\_

Card Holder's Name \_\_\_\_\_

Special Need/Disability

I have a special need/disability that may require specific accommodations in order for me to fully participate. Please note NAELA will try to accommodate your "other" special dietary needs, but cannot guarantee.

Special Need \_\_\_\_\_

Dietary Need:  Vegetarian  Kosher

Other: (please specify): \_\_\_\_\_

In case of an on-site emergency, please contact (please print clearly):

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Relationship to you: \_\_\_\_\_