



**The Basics of Special Needs Trust
October 18, 2007**

Marriott Suites Clearwater Beach on Sand Key
Clearwater Beach, Florida

8:00 a.m. – 8:45 a.m.	Registration and Continental Breakfast
8:45 a.m. – 9:00 a.m.	Welcome and Introductions
9:00 a.m. – 9:45 a.m.	Terminology and Purpose of SNTs <i>Mary Alice Jackson</i>
9:45 a.m. – 10:30 a.m.	Which SNT, When and Why? <i>Bradley J. Frigon</i>
10:30 a.m. – 10:45 a.m.	Break
10:45 a.m. – 11:30 a.m.	Concurrent Sessions
Session 1:	Alternatives to SNTs <i>Patty Stichler</i>
Session 2:	Evaluating Cases <i>Michael Carris</i>
11:30 a.m. – 12:15 p.m.	Concurrent Sessions
Session 1:	Ethics and Malpractice <i>Stu Zimring</i>
Session 2:	Housing <i>Craig Reaves</i>
12:15 p.m. – 1:30 p.m.	Lunch
1:45 p.m. – 2:30 p.m.	The Family Dynamics of Special Needs Planning <i>Brian J. Finn and Jay Kearns</i>
2:30 p.m. – 2:45 p.m.	Break
2:45 p.m. – 4:00 p.m.	The Ins and Outs of Administration <i>Lauchlin Waldoch, Robert Fleming, and Joshua B. Shulman</i>
4:00 p.m. – 5:00 p.m.	The Basics of SSI <i>Kenneth Brown (invited)</i>
5:00 p.m. – 6:00 p.m.	Poolside Reception

Special Needs Trusts IX Series
October 19, 2007

7:30 a.m. – 8:00 a.m.	Registration and Continental Breakfast
8:00 a.m. – 8:15 a.m.	Welcome and Announcements
8:15 a.m. – 9:10 a.m.	Beyond Ethics – Fiduciary Liability and How Trustees Get Sued <i>A. Frank Johns and Richard Milstein</i>
9:10 a.m. – 10:00 a.m.	New Developments and Case Law Update <i>Robert B. Fleming</i>
10:00 a.m. – 10:15 a.m.	Break
10:15 a.m. – 11:10 a.m.	Concurrent Sessions
Session 1:	Housing Modifications <i>Mark Shalloway and Larry M. Schneider</i>
Session 2:	Administrative Nightmares <i>William Main</i>
11:05 a.m. – 12:00 p.m.	Concurrent Sessions
Session 1:	Letters of Intent <i>Janet Lowder</i>
Session 2:	Divorce American Style – The Collision of Taxation and Public Benefits with SNTs for Property Division, Child Support, and Alimony <i>Neal Winston and Mark Worthington</i>
12:00 p.m. – 1:30 p.m.	Lunch
1:35 p.m. – 2:45 p.m.	Concurrent Sessions
Session 1:	Using Structured Settlement Annuities to Settle Cases; New Developments Including IRC Section 468b <i>Jay Kearns and Roger Bernstein</i>
Session 2:	The Philosophy of SNT Decision Making – Quality of Life vs. Preservation of Principal <i>Mary Alice Jackson, John Biesinger, and Sally Meyer</i>
2:45 p.m. – 3:00 p.m.	Break
3:00 p.m. – 4:00 p.m.	Concurrent Sessions
Session 1:	Taxes, SNTs and Retirement Plans <i>Brad Frigon</i>
Session 2:	Working with Others – The Trustee, The Investment Manager, The Care Manager <i>Vincent J. Russo and Bernard Krooks</i>
4:00 p.m. – 5:00 p.m.	The Relevant Regional Counsel Precedents on Special Needs Trusts, the Proposed/Recently Enacted Changes and the Published Regional POMS and SNTs <i>Kenneth Brown (invited)</i>