

The Center for Excellence in Elder Law

Stetson University College of Law

The Basics of Special Needs Trusts

Thursday, October 18, 2007

Special Needs Trusts IX

Friday, October 19, 2007

Marriott Suites Clearwater Beach on Sand Key • Clearwater Beach, Florida

Stetson University Inc
1700 North Tampa Street
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College of Law



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The Basics of Special Needs Trusts

Thursday, October 18, 2007

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

Special Needs Trusts IX

Friday, October 19, 2007

7:30 - 8:00 a.m.	Registration and Continental Breakfast	12:00 - 1:30 p.m.	Lunch
8:00 - 8:15 a.m.	Welcome and Announcements <i>Professor Rebecca C. Morgan</i>	1:45 - 2:45 p.m.	CONCURRENT SESSIONS
8:15 - 9:10 a.m.	Beyond Ethics - Fiduciary Liability and How Trustees Get Sued <i>A. Frank Johns and Richard Milstein</i>	Session 1:	Structures and 468b <i>Jay Kearns and Roger Bernstein</i>
9:10 - 10:00 a.m.	New Developments and Case Law Update <i>Robert B. Fleming</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>
10:00 - 10:15 a.m.	Break	2:45 - 3:00 p.m.	Break
10:15 - 11:10 a.m.	CONCURRENT SESSIONS	3:00 - 4:00 p.m.	CONCURRENT SESSIONS
Session 1:	Housing Modifications <i>Mark Shalloway and Larry Schneider</i>	Session 1:	Taxes, SNTs and Retirement Plans <i>Bradley J. Frigon</i>
Session 2:	Administrative Nightmares <i>William Main</i>	Session 2:	Working with Others - The Trustee, The Investment Manager, and The Care Manager <i>Vincent J. Russo and Bernard A. Krooks</i>
11:10 - 12:00 p.m.	CONCURRENT SESSIONS		
Session 1:	Letters of Intent <i>Janet Lowder</i>	4:00 - 5:00 p.m.	The Relevant Regional Counsel Precedents on Special Needs Trusts, the Proposed/Recently Enacted Changes and the Published Regional POMS on SNTs <i>Kenneth Brown (invited)</i>
Session 2:	Divorce American Style - Selected Topics Regarding the Effect of Child Support, Alimony and Property Division on SNTs <i>Neal Winston and Mark Worthington</i>		

TUITION: Prices are listed on the registration form. Tuition for each program includes admission to enrolled sessions, a set of program materials, continental breakfast, refreshment breaks, lunches, and Thursday's Poolside Reception. To ensure seating, pre-registration is advised. Register for both days and save.

TO REGISTER: Fill out and return the registration form with payment for the appropriate amount. Fax and telephone registrations will be taken if accompanied by an authorized credit card number for payment. Online registrations are available at www.law.stetson.edu/conferences/snt. To receive the Early Registration Rate, please register by Sept. 21, 2007.

CONFERENCE RECEPTION: All Thursday and Friday conference attendees are invited to attend a Poolside Reception held at the Marriott Suites Clearwater Beach on Sand Key at 5:00 p.m. on Thursday, Oct. 18, 2007.

GUEST: You may register your guest for the Poolside Reception held on Thursday, Oct. 18, 2007 for an additional \$35.00. You may also register your guest for a *guest meals ticket*, which includes all continental breakfasts, refreshment breaks and lunches on Thursday and Friday (Oct. 18-19). A *guest meals ticket* is \$100.00. Please request and indicate these items on the registration form and include payment. Guests may obtain their name badges at the Conference Registration Desk.

CANCELLATIONS: Individuals who cancel registrations by 5:00 p.m. Oct. 5, 2007 will receive a refund less a \$50 cancellation fee. No refunds will be given after that date, however, individuals who cancel after Oct. 5 will have

the option of sending a substitute attendee. To purchase materials or view the webcast, please refer to the webcast or material order portion of the registration form. In the unlikely event that this program is cancelled, registration fees will be completely refunded. The sponsors cannot be responsible for other costs incurred by registrants, including travel and hotel accommodations.

SPECIAL NEEDS: If your attendance requires any aids or services, as addressed in the Americans with Disabilities Act, please notify the Office of Conferences and Events at (813) 228-0226 at least two weeks prior to the Conference.

CONTINUING EDUCATION CREDITS: Application is being made to The Florida Bar for 14.1 total hours of CLE credit. Application is also being made for CPA, CFP, CTFA, and guardianship CE credits. Those who are requesting credits outside of Florida will receive forms to apply for credit in those states. (Please request and indicate state on registration form). Please visit our web site at www.law.stetson.edu/conferences for continuing education updates.

ACCOMMODATIONS: The Marriott Suites Clearwater Beach on Sand Key offers a 10-story view of Clearwater Bay along the pristine Gulf Coast of Florida. The resort hotel features a fitness center, state-of-the-art meeting facilities, wireless high-speed Internet and on-site fine dining. The Marriott Suites is located at 1201 Gulf Boulevard, Clearwater Beach, Florida. Phone: (727) 596-1100. Special Stetson Seminar Rate is \$163 single/double. Cut-off date: September 19, 2007. Please call the hotel directly and make your reservations early to ensure a room.



The Basics of Special Needs Trusts • October 18, 2007
Special Needs Trusts IX • October 19, 2007
 Marriott Suites • Clearwater Beach, Florida

REGISTRATION FORM

(Please submit a separate copy for each registrant from the same institution)

Mr. Ms. Dr. _____ Phone: (____) _____

Title: _____ Fax: (____) _____

Organization/Firm: _____

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City: _____ State: _____ Zip: _____

E-mail: _____

Attorneys: CLE Credit? If yes, list state(s): _____ List other professional credits: _____

TUITION (Includes admission to all sessions, printed materials (for live attendees only), continental breakfasts, refreshment breaks, lunches and reception).

THE BASICS OF SNT

(October 18, 2007)

- \$225 "Group Discount"*
- \$245 "Early Registration" (by 9/21/07)
- \$260 "Standard" (after 9/21/07)
- add \$25 for CD of materials

- \$250 Webcast viewing
- Add \$35 for Video DVD of Session 2

SPECIAL NEEDS TRUSTS IX

(October 19, 2007)

- \$225 "Group Discount"*
- \$245 "Early Registration" (by 9/21/07)
- \$260 "Standard" (after 9/21/07)
- add \$25 for CD of materials

- \$250 Webcast viewing
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TWO SESSIONS SAVINGS

(Attend BOTH and SAVE)

- \$395 "Group Discount"*
- \$425 "Early Registration" (by 9/21/07)
- \$450 "Standard" (after 9/21/07)
- add \$50 for CD of materials

- \$435 Webcast viewing
- Add \$70 for Video DVD of Session 2

*Group Discount (Combination of three or more registrations from the same firm or non-profit organization).

- \$100 Guest Meals Ticket (for all continental breakfasts, refreshments breaks, and lunches on Oct. 18-19).
- \$35 Guest Reception Ticket Only (for the Poolside Reception on Oct. 18). Guest Name: _____
- Vegetarian Meal Request (Attendee) Vegetarian Meal Request (Guest)

NOTE: CLE credits are approved for live presentation attendance and audio/video viewing only.

Printed Material Order Only (Not attending seminars)

- \$150 The Basics of SNT Add \$25 for CD
- \$150 SNT IX Add \$25 for CD
- \$225 Both Seminars Add \$50 for CD

Video or Audio Order Only (Written materials included)

- \$225 Audio CD The Basics of SNT \$225 Audio CD of SNT IX
- \$225 Video DVD The Basics of SNT \$225 Video DVD of SNT IX
- \$450 Audio CD BOTH Sessions \$450 Video DVD BOTH Sessions
- Materials on CD OR Binder

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Online registration is available at
www.law.stetson.edu/conferences/SNT

Stetson University College of Law is proud to present the nationally recognized seminars: “**The Basics of Special Needs Trusts**” and “**Special Needs Trusts IX**” at the Marriott Suites Clearwater Beach on Sand Key located in Clearwater Beach, Florida. The objective of these seminars is to continue to provide an in-depth review and discussion on a basic and an intermediate level of the major issues presented by the creation, administration, and monitoring of special needs trusts. Attorneys, insurance professionals, financial advisors, CPAs, trustees, and other elder care professionals will benefit from these cutting-edge seminars.

Topics include:

- Terminology and Purpose of SNTs
- Which SNTs, When and Why?
- Understanding the Emotional and Family Dynamics of Special Needs Families
- The Ins and Outs of Administration
- Divorce American Style - Selected Topics Regarding the Effect of Child Support, Alimony, and Property Division on SNTs
- Beyond Ethics - Fiduciary Liability and How Trustees Get Sued
- New Developments and Case Law Update

PROGRAM CHAIR

Professor Rebecca C. Morgan

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Stetson University College of Law, Gulfport, Florida

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Kenneth Brown (invited)

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SEMINAR SPONSORS

Stetson University College of Law was founded in 1900 as Florida's first law school. Located in Tampa Bay, the law school offers full-time and part-time programs for the J.D. and LL.M. degrees and consistently earns top national rankings for trial advocacy and legal writing.

The Center for Excellence in Elder Law at Stetson advances scholarly activity concerning legal issues and the elderly through conferences, community workshops, research projects, scholarship and education. Directed by Rebecca C. Morgan, who holds the Boston Asset Management Faculty Chair in Elder Law, the Center also offers an online LL.M. degree program in Elder Law. Interested persons who would like to become involved in the activities of the Center should contact Professor Morgan at (727) 562-7872; or e-mail morgan@law.stetson.edu.

ATTEND WEBCAST

For those who are unable to attend, you can still view the conference via webcast by selecting a webcast option on the registration form. Individuals who register for webcast

by 5:00 p.m. Oct. 12. will receive a CD-ROM of the materials. No materials will be sent after that date; however, individuals who register for webcast after Oct. 12 will be able to download the materials off the web. **Please note:** Plenary session and Session 1 will be available for webcast viewing. Session 2 will be available on DVD for \$35.

MATERIAL ORDERS

If you would like to order materials from Special Needs Trust Series IX, please call the Office of Conferences and Events at (813) 228-0226 or fill out order information on the registration page included with this brochure. Past materials from Special Needs Trusts seminars are also available for purchase. Other titles available on DVD, Audio CD or streaming are: The Basics of Special Needs Trusts 2006 (Attorney or Trustees Track), and Social Security Disability Practice Update 2006, The Basics of SSD Practice and Advocacy Skills in SSD Cases 2007, and The Nuts and Bolts of SNT Administration 2007. To order past CLE Audio CDs, Video CD-ROMs and DVDs of recorded programs, please visit www.law.stetson.edu/conferences.

SPONSORSHIP/EXHIBITOR SPACE AVAILABLE

For sponsorship/exhibitor information for Special Needs Trusts IX Series, please contact the Office of Conferences and Events at (813) 228-0226 or e-mail conferences@law.stetson.edu

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