



Second Annual Fundamentals of Special Needs Trust Administration

April 24-25, 2008
Marriott Suites on Sand Key
Clearwater Beach, Florida

Office of Conferences and Events
1700 North Tampa Street
Tampa, Florida 33602-2653



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Second Annual Fundamentals of Special Needs Trust Administration

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Thursday, April 24, 2008

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|------------------|---|------------------|---|
| Noon - 1:00 p.m. | Registration | 2:45 - 4:00 p.m. | Public Benefits Primer: Which SNT and Why (Continued) <i>Mary Alice Jackson & Robert B. Fleming</i> |
| 1:00 - 1:15 p.m. | Welcome and Introductions <i>Prof. Rebecca C. Morgan, Program Chair</i> | 4:00 - 5:00 p.m. | Evaluating Contracts and Hiring Others <i>Vincent J. Russo</i> |
| 1:15 - 2:30 p.m. | Public Benefits Primer: Which SNT and Why <i>Mary Alice Jackson & Robert B. Fleming</i> | 5:00 - 6:00 p.m. | Poolside Reception |
| 2:30 - 2:45 p.m. | Break | | |

Friday, April 25, 2008

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|--------------------|--|------------------|--|
| 8:00 - 8:30 a.m. | Registration and Continental Breakfast | 1:15 - 2:00 p.m. | Working with Clients with Traumatic Brain Injury <i>Dr. Jennifer J. Duchnick, Lee Ann Brumble & Lisa Perla</i> |
| 8:30 - 8:40 a.m. | Welcome and Announcements <i>Prof. Rebecca C. Morgan, Program Chair</i> | 2:00 - 3:00 p.m. | You Want to Buy What? <i>Susan Mesenbrink</i> |
| 8:40 - 10:00 a.m. | Duties, Obligations and Liabilities <i>Lauchlin Waldoch & Jefferey M. Yussman</i> | 3:00 - 3:15 p.m. | Break |
| 10:00 - 10:15 a.m. | Break | 3:15 - 4:00 p.m. | Case Law Update—Recent Cases That Affect SNT Administration <i>Mary Alice Jackson</i> |
| 10:15 - 11:00 a.m. | Living with Structured Settlements <i>Alexander M. Clem & Leo Govoni</i> | 4:00 - 5:00 p.m. | Tax Issues <i>Robert B. Fleming</i> |
| 11:00 a.m.- Noon | Liens, Set-Asides and Closing a SNT <i>Lauchlin Waldoch</i> | 5:00 p.m. | Adjourn |
| Noon - 1:15 p.m. | Lunch | | |

Conference Faculty

Professor Rebecca C. Morgan

Program Chair, Boston Asset Management Faculty Chair in Elder Law
Stetson University College of Law, Gulfport, Florida

Lee Ann Brumble

James A. Haley VA Medical Center
Tampa, Florida

Alexander M. Clem, Esq.

Morgan & Morgan, P.A.
Orlando, Florida

Dr. Jennifer J. Duchnick

James A. Haley VA Medical Center
Tampa, Florida

Robert B. Fleming, Esq.

Fleming & Curti, PLC
Tucson, Arizona

Leo Govoni

The Center for Special Needs Trust
Administration, Inc.
Clearwater, Florida

Mary Alice Jackson, Esq.

Boyer & Jackson, P.A.
Sarasota, Florida

Susan Mesenbrink

Wells Fargo Special Needs Trust Group
Seattle, Washington

Lisa Perla

James A. Haley VA Medical Center
Tampa, Florida

Vincent J. Russo, J.D., LL.M., CELA

Vincent J. Russo & Associates, P.C.
Lido Beach, New York

Lauchlin Waldoch, Esq.

McConnaughay Law Group, P.A.
Tallahassee, Florida

Jefferey M. Yussman, Esq.

Wyatt Tarrant & Combs, LLP
Louisville, Kentucky

To view speakers' full biographies, please visit <http://www.law.stetson.edu/conferences/SNTfundamentals>

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Register online at www.law.stetson.edu/conferences/SNTfundamentals

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Interested in other CLE seminars

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Stetson University College of Law Graduate

CLE Credit? States: _____ List other professional credits: _____

TUITION - includes admission to all sessions, continental breakfasts, refreshment breaks, lunch, materials and reception.

\$259 Early Bird Rate (*postmarked by 04/03/08*) add \$25 for a CD-ROM (*Binder included in tuition*)

\$299 Individual Registration Rate add \$25 for a CD-ROM (*Binder included in tuition*)

\$249 Multiple Registrations Rate* add \$25 for a CD-ROM (*Binder included in tuition*)

*Combination of two or more from the same firm or non-profit organization. Must be MAILED TOGETHER.

Poolside Reception (*Included in tuition*)

Vegetarian Meal Request (*Attendee*)

GUEST REGISTRATION:

\$25 - Guest Ticket for Poolside Reception

\$40 - Guest Meal Ticket (*breaks, breakfast and lunch on April 25*)

Vegetarian Meal Request (*Guest*) Guest Name: _____

MATERIALS ORDER ONLY:

Printed Material Order Only: (*Not attending seminar*)

\$150 CD-ROM

\$150 Binder

\$190 Both: CD-ROM & Binder

Audio Order Only (*Not attending seminar*)

\$189 Audio CD

\$259 Audio CD with written materials: Binder CD-ROM

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A Program for SNT Trustees, Financial Planners, Money Managers and Others Involved in SNT Trust Administration

TUITION: Prices are listed on the registration form. Tuition for each program includes admission to enrolled sessions, a set of program materials, Thursday's Poolside Reception, continental breakfast, refreshment breaks and lunch on Friday, April 25, 2008. To ensure seating, pre-registration is advised.

TO REGISTER: Complete and return the registration form with payment by mail or fax to (813) 228-0155. Fax and telephone registrations will be taken if accompanied by an authorized credit card number for payment. Online registration is available at www.law.stetson.edu/conferences/SNTfundamentals.

CONFERENCE RECEPTION: All conference attendees are invited to attend a Poolside Reception held at the Marriott Suites on Sand Key at 5:00 p.m. on Thursday, April 24, 2008.

GUEST MEALS: You may register your guest for the Poolside Reception held on Thursday, April 24, 2008, for an additional \$25.00. Guests can also purchase a *guest meal ticket*, which includes refreshment breaks on both days and Friday's breakfast and lunch, for an additional \$40.00. Please indicate 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., April 10, 2008, will receive a refund less a \$75 cancellation fee. No refunds will be given after that date, but individuals who cancel after April 10 will have the option of sending a substitute attendee. Telephone

cancellations must be confirmed in writing. In the unlikely event that this program is cancelled, registration fees will be completely refunded. The sponsors are not responsible for other costs incurred by registrants, including travel and hotel accommodations.

SPECIAL NEEDS: If your attendance requires any aids or services, please notify the Office of Conferences and Events at (813) 228-0226 at least two weeks before the conference.

CONTINUING EDUCATION CREDITS:

Attorneys and CPAs: Application is being made to The Florida Bar for CLE credits. Application also is 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 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 Rate is \$209 single/double. Cut-off date: March 27, 2008. Please call the hotel directly and make your reservations early to ensure a room.

Save the Date!

Mark your calendars now for the Special Needs Trusts X Series on October 16–17, 2008 at the Don CeSar Beach Resort in St. Pete Beach, Florida.

Call the Office of Conferences and Events at (813) 228-0226 or visit our web site at www.law.stetson.edu/conferences for more information.