



Second Annual Fundamentals of Special Needs Trust Administration

April 24-25, 2008

Marriott Suites on Sand Key • Clearwater Beach, Florida

Agenda

Thursday, April 24, 2008

Room

Noon – 1:00 p.m.	Registration	Lobby
1:00 – 1:15 p.m.	Welcome & Introductions <i>Professor Rebecca C. Morgan, Program Chair</i> <i>Stetson University College of Law</i>	Sand Key Ballroom
1:15 – 2:30 p.m.	Public Benefits Primer: Which SNT & Why <i>Robert B. Fleming, Fleming & Curti, PLC</i> <i>Mary Alice Jackson, Esq., Boyer & Jackson, P.A.</i>	Sand Key Ballroom
2:30 – 2:45 p.m.	Break	Lobby
2:45 – 4:00 p.m.	Public Benefits Primer: Which SNT & Why (Continued) <i>Robert B. Fleming, Fleming & Curti, PLC</i> <i>Mary Alice Jackson, Esq., Boyer & Jackson, P.A.</i>	Sand Key Ballroom
4:00 – 5:00 p.m.	Evaluating Contracts and Hiring Others <i>Vincent J. Russo</i> <i>Vincent J. Russo & Associates, P.C.</i>	Sand Key Ballroom
5:00 – 6:00 p.m.	Poolside Reception	Poolside Veranda

Friday, April 25, 2008

8:00 – 8:30 a.m.	Registration and Continental Breakfast	Lobby
8:30 – 8:40 a.m.	Welcome and Announcements <i>Prof. Rebecca C. Morgan, Program Chair</i> <i>Stetson University College of Law</i>	Sand Key Ballroom
8:40 – 10:00 a.m.	Duties, Obligations and Liabilities <i>Lauchlin Waldoch, McConnaughay Law Group, P.A.</i> <i>Jefferey M. Yussman, Esq., Wyatt, Tarrant & Combs LLP</i>	Sand Key Ballroom

10:00 – 10:15 a.m.	Break	Lobby
10:15 – 11:00 a.m.	Living with Structured Settlements <i>Daniel J. Alvarez, Millennium Settlements</i> <i>Alexander M. Clem, Esq., Morgan & Morgan, P.A.</i>	Sand Key Ballroom
11:00 a.m. – Noon	Liens, Set-Asides and Closing a SNT <i>Pi-Yi G. Mayo, Esq., Law Office of Pi-Yi G. Mayo</i> <i>Lauchlin Waldoch, McConnaughay Law Group, P.A.</i>	Sand Key Ballroom
Noon – 1:15 p.m.	Lunch	Watercolour Steakhouse
1:15 – 2:00 p.m.	Working with Clients with Traumatic Brain Injury <i>Lee Ann Brumble, James A. Haley VA Medical Center</i> <i>Dr. Jennifer J. Duchnick, James A. Haley VA Medical Center</i> <i>Lisa Perla, CFNP, James A. Haley VA Medical Center</i>	Sand Key Ballroom
2:00 – 3:00 p.m.	You Want to Buy What? <i>Susan Mesenbrink, CFP, CTFA</i> <i>National Special Needs Trust Group of Wells Fargo Private Client Services</i>	Sand Key Ballroom
3:00 – 3:15 p.m.	Break	Lobby
3:15 – 4:00 p.m.	Case Law Update: Recent Cases That Affect SNT Administration <i>Mary Alice Jackson, Esq., Boyer & Jackson, P.A.</i>	Sand Key Ballroom
4:00 – 5:00 p.m.	Tax Issues <i>Robert B. Fleming, Esq., Fleming & Curti, PLC</i>	Sand Key Ballroom
5:00 p.m.	Adjourn	