

PROGRAM FACULTY BIOS

Stetson University College of Law presents:

**SECOND ANNUAL FUNDAMENTALS OF SPECIAL NEEDS TRUST
ADMINISTRATION**

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

PROGRAM CHAIR



REBECCA C. MORGAN

Director, Center for Excellence in Elder Law
Boston Asset Management Faculty Chair in Elder Law
Stetson University College of Law
Gulfport, Florida

Professor Rebecca C. Morgan is the director of Stetson's Center for Excellence in Elder Law and the holder of the Boston Asset Management Faculty Chair in Elder Law, the first chair in elder law in the country. Professor Morgan is a past president of the National Academy of Elder Law Attorneys (NAELA). She is a NAELA fellow and an academic fellow in the American College of Trusts and Estates Council (ACTEC). She was a special advisor to the ABA Commission on Legal Problems of the Elderly and is the past president of the Board of Directors of the National Senior Citizens Law Center. She served as the reporter for the Uniform Law Commissioners for the Uniform Guardianship and Protective Proceedings Act and directs Stetson's Elder Consumer Protection Project.

She received the 2004 NAELA UnAward in recognition of her contributions to the field of elder law. She received the 2003 Florida Bar Faculty Award for Professionalism. Professor Morgan has been the chair of The Florida Bar Elder Law Section and the American Association of Law Schools Section on Aging and the Law, and was a delegate to the 1995 White House Conference on Aging. She is on the faculty of the National Judicial College. She served on the Florida Attorney General's Task Force on Elder Abuse and on the Legislative Guardianship Study Commission. She is the successor co-author of Matthew Bender's "Tax, Estate and Financial Planning for the Elderly," and its companion forms book, as well as a co-author of LexisNexis' "Planning for the Elderly in Florida." She has written a number of law review articles dealing with legal issues affecting the elderly and has made numerous presentations on various subjects of elder law.

PROGRAM FACULTY

DANIEL J. ALVAREZ

Partner

Millennium Settlements

Tampa, Florida

Daniel J. Alvarez is a partner with Millennium Settlements in Tampa, Florida. He specializes in advising personal injury victims in areas including financial and structured settlement planning and public benefits preservation. Previously, Mr. Alvarez was a founding partner with Structured Sales Group where he specialized in tax deferral planning in the purchase and sale of investment real estate and small to medium businesses. In addition, Mr. Alvarez has professional affiliations with AAJ, American Bar Association, Florida Justice Association – Young Lawyers Section board member, member of the Hillsborough County Bar Association, Hillsborough County Young Lawyers Section, National Structured Settlement Trade Association, Round Table Group's Expert Network. Mr. Alvarez co-authored "Structured Sales for Highly Appreciated Properties: Increase your Sales and Maximize the Seller's Net by Deferring Tax Liability" in 2007. He also published "Alternative Tax Deferral Options in Real Estate Transactions" and "Personal Injury Recovery Basics" on Clarislaw.com in 2006. He earned his bachelor's degree in marketing from Florida State University and his J.D. degree, *cum laude*, from Florida State University College of Law.

LEE ANN BRUMBLE

Vocational Rehabilitation Specialist

James A. Haley VA Medical Center

Tampa, Florida

Lee Ann Brumble has worked in the field of vocational rehabilitation for the past 21 years. She worked for the State of Florida as a Vocational Rehabilitation Counselor; VR Senior Counselor, VR Supervisor; VR Consultant and for James A. Haley VA Medical Center as a Vocational Rehabilitation Specialist. She has specialized in providing vocational rehabilitation services to individuals with traumatic and acquired brain injuries. She is a Certified Brain Injury Specialist, has a bachelor's degree in Social Work and is currently pursuing a Master's Degree in Rehabilitation Counseling from the University of South Florida.



ALEXANDER M. CLEM, ESQ.
Attorney at Law
Morgan & Morgan, P.A.
Orlando, Florida

Alexander Murphree Clem was born in Vero Beach, Florida. Mr. Clem received a B.A. degree from Furman University in 1986 and his J.D. degree from Stetson University College of Law, where he graduated *cum laude* in 1990. While at Stetson, Mr. Clem was a member of the *Stetson Law Review*, the winner of the Attorney's Title Insurance Fund Law Review Competition and runner-up in the freshman moot court competition. Before attending law school, Mr. Clem was the recipient of a Rotary Scholarship and studied at the University of Bristol in Bristol, England. He also studied at Kansai Gaidai University in Osaka, Japan. Mr. Clem practices in the area of nursing home negligence, personal injury, wrongful death and mass torts litigation. He is a member of the Million Dollar Advocates Forum and he has been actively involved in the trial bar activities both in Florida and at the national level.

Mr. Clem has served as a member of the Legislative Committee of the Orange County Bar Association and the Federal and State Trial Practice Committee of the Orange County Bar Association, where he served as chairman of the Courtroom Technology Subcommittee. He is a member of The Florida Bar, the Tennessee Bar, American Bar Association and he has been a member of the National Academy of Elder Law Attorneys. Mr. Clem currently serves on the Board of Overseers at Stetson University College of Law.

Since 1997, Mr. Clem has served in leadership roles in the Academy of Florida Trial Lawyers, (AFTL) including being selected by his peers to serve as president of the organization during the 2004-2005 term. As a leader of the Academy of Florida Trial Lawyers, Mr. Clem has fought the insurance industry for several years as an advocate for the interests of injured Floridians and the civil justice system. Mr. Clem served for several years on AFTL's Executive Committee and its Board of Directors, he is a F.L.A.G. trustee (the political arm of the AFTL) and an EAGLE sponsor. Mr. Clem has been a frequent lecturer at AFTL and ATLA seminars throughout the country on a variety of topics relating to nursing home and personal injury litigation. He has also testified extensively before Florida Senate and House committees on a wide range of tort reform issues.

Mr. Clem has been selected by his peers for inclusion in *The Best Lawyers in America (2005-2006)* and he was selected as the 2005 recipient of the Distinguished Alumnus Award from Stetson University College of Law. As referenced in the July 2006 *Florida Trend* magazine, Mr. Clem was featured as one of Florida's Legal Elite, a select group comprising the top 2% of lawyers in Florida. He has also been named as a "Lawyer of Distinction" in the *Orlando Magazine*. In December 2006, he was also recognized by *The Orlando Business Journal* as one of the "Best of the Bar" in Orlando. The June 2007 issue of *Florida Super Lawyers* magazine named Mr. Clem one of the top 5% attorneys in Florida. Mr. Clem is also actively involved in numerous charitable organizations in Orlando. He is married to Carmen Maria Clem with whom

he has three children: Cristina, Isabella and Alexander, II.

DR. JENNIFER J. DUCHNICK
Clinical Neuropsychologist
Spinal Cord Injury/Disorders Center
James A. Haley VA Medical Center
Tampa, Florida

Dr. Jennifer J. Duchnick is licensed psychologist with specialty training in neuropsychology and rehabilitation psychology. She earned her Doctorate in Clinical Psychology from Auburn University, Alabama in 2001. She completed a post-doctoral fellowship in neuropsychology at the James A. Haley VA Medical Center (JAHVA), where she evaluated and treated brain injury patients undergoing acute rehabilitation. She worked as a psychologist in the Spinal Cord Injury Center Acute Rehabilitation program of JAHVA from 2002 to 2007, where she also initiated a randomized clinical trial investigating the effectiveness of a coping skills training intervention in supporting adjustment to injury. Since the summer of 2007, she has been working with the polytrauma/Brain Injury transitional programs, providing neuropsychological and psychological evaluation and treatment. She is currently pursuing board certification through the American Board of Professional Psychology in the specialty area of rehabilitation psychology



ROBERT B. FLEMING, ESQ.
Attorney at Law and Partner
Fleming & Curti, PLC
Tucson, Arizona

Robert B. Fleming is a partner in the Tucson law firm of Fleming & Curti, PLC, with a practice limited to guardianship, conservatorship, estate planning and probate. Mr. Fleming is the author of *The Elder Law Answer Book*, published by Panel Publishers. Mr. Fleming has been selected as a fellow for the American College of Trust and Estate Counsel and the National Academy of Elder Law Attorneys. He is a past chair of the Mental Health and Elder Law and Probate and Trust Sections of the State Bar of Arizona, and he served as director of the National Academy of Elder Law Attorneys. At different times, he served as president of the Pima County Bar Association (he is now a member of the Board of Directors of that association) and the Young Lawyers Section of the State Bar of Arizona. Mr. Fleming served as a delegate to the 1995 White House Conference on Aging. He currently serves as a member of the Special Needs Alliance (www.specialneedsalliance.com), the Southern Arizona Estate Planning Council, the Pima County Bar Association and the State Bar of Arizona. Mr. Fleming is a husband, father, pilot and martial arts practitioner.



MARY ALICE JACKSON, ESQ.
Attorney at Law and Partner
Boyer & Jackson, P.A.
Sarasota, Florida

Mary Alice Jackson is a Florida Bar board-certified elder law attorney and a partner in the firm of Boyer & Jackson, P.A. in Sarasota, Florida. Ms. Jackson is AV-rated by Martindale Hubbell and was named as one of Florida's Legal Elite by *Florida Trend* in 2006. She practices exclusively in the area of elder law, with an emphasis on public benefits, long-term care and incapacity planning, special needs trusts, advance directives, probate and end-of-life issues. She frequently lectures on these topics.

Ms. Jackson currently serves on the Board of Directors for the Pines of Sarasota, a long-term care facility, and the Board of Governors for Senior Friendship Centers, Inc. She has served as a professional president or chair of the following organizations: the Elder Law Section of the Florida Bar; the Sarasota County Bar Association, the Board of Trustees of Tidwell Hospice of Southwest Florida, Inc., Senior Solutions of Southwest Florida, an Area Agency on Aging; the Board of Directors of Legal Aid of Minnesota, Inc., and the founding Board of the NAELA (National Academy of Elder Law Attorneys) Senior Rights PAC, an organization dedicated to supporting national political candidates with a commitment to aging Americans. Ms. Jackson currently serves as vice chair of the Public Policy Committee for NAELA.

A member of the NAELA since 1993, she is also a member of the Florida Bar Elder Law Section, the Academy of Florida Elder Law Attorneys, the Sarasota County Aging Network and the Florida Council on Aging. She is the recipient of the 2003 NAELA Powley Award for public service and the 2004 William Reece Smith Jr. Public Service Award given by Stetson University College of Law. Ms. Jackson received the 1998 Florida Bar Pro Bono Service Award for the Twelfth Circuit and is an adjunct professor at Stetson University College of Law, teaching interviewing, counseling and negotiations and law practice management in Masters of Laws in Elder Law.

Ms. Jackson received a B.A. degree in Government and a master's degree in Public Administration from Florida State University, and J.D. degree, *cum laude*, from Stetson University College of Law. She now lives in Austin, Texas with her husband, Bob, who is Texas State Director for AARP and an attorney. She continues her practice in Sarasota by commuting and telecommuting, with the assistance of a top-notch staff. Ms. Jackson is the proud mother of the inimitable Andrew Ferrell, who died in 2001 after a battle with leukemia. She is a native of Winter Park, Florida.



PI-YI G. MAYO, ESQ.
Attorney at Law
Law Office of Pi-Yi G. Mayo
Baytown, Texas

Pi-Yi G. Mayo is certified as an Elder Law attorney by the National Elder Law Foundation. He received his bachelor's degree in finance, *magna cum laude*, from University of Houston in 1980 and his J.D. degree from Bates College of Law at University of Houston in 1983. He currently serves as an adjunct professor at the University of Houston's Bates College of Law, where he teaches Elder Law. He taught real estate law, finance and mathematics at the Lee College of Baytown for eight years. He is a member of the American Bar Association, State Bar of Texas, Houston Bar Association and East Harris County Bar Association. He was a past chairman of the Houston Bar Association Elder Law Committee and past vice chairman of the American Bar Association's Elder Law Committee.

SUSAN MESENBRINK, CFP, CTFA
Vice President and Manager
National Special Needs Trust Group of Wells Fargo Private Client Services
Seattle, Washington

Susan Mesenbrink, CFP, CTFA is Vice President and manager for the National Special Needs Trust Group of Wells Fargo Private Client Services. In addition to managing the Special Needs Trust Group, Ms. Mesenbrink also assists in the development and coordination of service delivery systems for these unique trusts and educational development and training opportunities for Wells Fargo trust officers. Since joining Wells Fargo in 1988 as an institutional investment representative, Ms. Mesenbrink's experience has included serving as a trust services business development officer and senior trust administrator at Wells Fargo & Company.

Prior to joining Wells Fargo, Ms. Mesenbrink worked at Dean Witter Reynolds for four years, where she held the position of Registered Representative. She has been in the financial industry for more than twenty-three years.

Ms. Mesenbrink earned her B.A. degree in social welfare from the University of Washington. She is also a member of the Financial Planning Association; American Banker's Association and holds the designations of Certified Financial Planner and Certified Trust and Financial Advisor.

LISA PERLA, CFNP
Polytrauma Network Site Clinical Coordinator
James A Haley VA Medical Center
Tampa, Florida

Lisa Perla received her degree in nursing from Jackson Memorial Hospital School of Nursing, her bachelor's degree from Florida International University and her master's degree in Nursing from Barry University. She is a licensed and certified family nurse practitioner and a certified neuroscience nurse.

Ms. Perla's diverse professional background includes: trauma and intensive care unit nurse, an ICU nurse manager, an ICU physician extender, a liver/GI transplant coordinator, a stroke and epilepsy nurse practitioner, a primary care nurse practitioner and as a nursing educator. She currently works at the James A. Haley VA Medical Center in Tampa as the polytrauma network site clinical coordinator.



VINCENT J. RUSSO, ESQ.
Managing Shareholder
Vincent J. Russo & Associates, P.C.
Lido Beach, New York

Vincent J. Russo, J.D., LL.M., CELA, Managing Shareholder of Vincent J. Russo & Associates, P.C., Long Island's Signature Elder Law, Special Needs and Estate Planning Law Firm with offices in Westbury, Islandia, Lido Beach, and Woodbury, New York, has championed the rights of seniors and people with disabilities since 1985.

Mr. Russo is a co-founder of the Academy of Special Needs Planners and past Board Member and president of United Cerebral Palsy Nassau Guardianship Corporation and a Co-Founder and Officer of The Theresa Alessandra Russo Foundation for children with special needs.

Mr. Russo is a Founding Member, Fellow and Past President of the National Academy of Elder Law Attorneys and is a Founding Member and Past President of the New York Chapter of NAELA (National Academy of Elder Law Attorneys). He is also a member of the prestigious, invitation only, Council of Advanced Practitioners (CAP) of NAELA. Mr. Russo is a Founding Member and Past Chair of the Elder Law Section of the New York State Bar Association (NYSBA). He is also the Past Chair and Founder of the Legal Advisory Committee to the Alzheimer's Association Long Island Chapter and a Board Member of the Arthritis Foundation Long Island Chapter.

Mr. Russo is a nationally recognized author, lecturer and authority in Elder Law, Special Needs and Estate Planning. He is a certified elder law attorney by the National Elder Law Foundation.

Vincent is admitted to the New York, Massachusetts and Florida state bars and is the co-author of New York Elder Law Practice (West Thompson).



LAUHLIN WALDOCH, ESQ.
Attorney at Law
McConnaughay Law Group, P.A.
Tallahassee, Florida

Lauchlin Waldoch is co-chair of the McConnaughay Law Group's elder law practice and devotes her time exclusively to elder law and related issues. Her practice includes wills, trusts, probate, guardianship and incapacity planning, including powers of attorney, advance directives for health care such as living wills and health care surrogate designations. In addition, substantial part of her practice involves assisting individuals in qualifying for public assistance (specifically long-term care), the preparation and administration of special needs trusts and estate planning for individuals with disabilities and their families. She is board certified by the Florida Bar in Elder Law and has been designated a Certified Elder Law Attorney (CELA) by the National Elder Law Foundation. As a co-chair of the Public Policy Task Force of the Academy of Florida Elder Law Attorneys (AFELA) and the Elder Law Section of the Florida Bar, she works with legislative and regulatory issues affecting seniors and persons with disabilities. The Elder Law Section of the Florida Bar and the AFELA recognized Ms. Waldoch as Member of the Year in 2005. In 2004, she became a member of the Special Needs Alliance, an invitation only national organization devoted to persons with special needs. She is also active in numerous national, state and community organizations related to the elderly and individuals with disabilities.

JEFFEREY M. YUSSMAN, ESQ.
Attorney at Law
Wyatt, Tarrant & Combs, LLP
Louisville, Kentucky

Jefferey M. Yussman is a member of the Wyatt, Tarrant & Combs' Estate Planning Group and concentrates his practice in the areas of estate planning and administration (with an emphasis on special needs planning), business succession planning and charitable planning. He is a Fellow of the American College of Trust and Estate Counsel, where he actively serves on the Practice Committee, and is listed in America's Best Lawyers for Estate Planning and Elder Law. Mr. Yussman was recognized by his peers as one of Kentucky Super Lawyers 2007. He has authored "The Use of Technology in Estate Planning" for the University of Kentucky Estate Planning Handbook, 3rd Ed (2003) and "Postmortem Strategies That Enhance a Client's Estate Plan," *Estate Planning Magazine* March/April 1995. He also lectures frequently on estate, special needs, business succession and charitable planning topics. Mr. Yussman currently serves on the boards of the Community Foundation of Louisville and Wellspring (Schizophrenia Foundation

of Kentucky). He recently completed service on the executive committee of the Board of Metro United Way, where he continues to serve on the nominating committee and is a former board member of the Leadership Louisville Foundation. Mr. Yussman received his B.S. degree in accounting in 1979 from the University of Kentucky and his J.D. degree in 1982 from the University of Louisville's Brandeis School of Law.