

12 CLE CREDITS | 12 NURSING HOME CREDITS | 14 CPA CREDITS

20TH ANNUAL

ELDER LAW INSTITUTE

The event of the year for everyone who represents the elderly!

IT'S OUR **20**TH YEAR!

JOIN THE CELEBRATION

Come see why elder and estate lawyers, general practitioners, social workers, paralegals, nursing home administrators and other professionals have made this a **must attend event** for the past 20 years.

- ▶ Have a great time together
- ▶ Find out what's new/changing
- ▶ Choose from over 30 topics
- ▶ Learn from our skillful teachers
- ▶ Hear Teepa Snow's keynote address
- ▶ Celebrate at the Section reception



Harrisburg

Thu. & Fri., July 20-21, 2017

HARRISBURG HILTON, 2ND & MARKET STREETS

8:20 am – 4:30 pm; check-in and continental breakfast begin at 7:30 am



Continuing Legal Education Arm
of the Pennsylvania Bar Association

20TH ANNUAL

ELDER LAW INSTITUTE

It's Pennsylvania's biggest & best elder law conference

In Washington a new administration and Republican controlled Congress are making changes in health care and access to benefits for seniors. At the state and local levels, budgets are strained and many essential services for the elderly are being dropped. With America's 65-and-over population projected to nearly double over the next three decades, elder law professionals need to be prepared to offer sound advice and planning options to seniors. Our *Elder Law Institute* is the place to find fresh ideas and new ways to advocate for your elderly clients and their families.

HARRISBURG

Hilton Harrisburg, 2nd & Market Sts.

8:20 AM TO 4:30 PM

CHECK-IN AND CONTINENTAL BREAKFAST BEGIN

AT 7:30 AM BOTH DAYS

See page 10 for directions and reservation info

THE YEAR IN REVIEW

CATCH UP ON ALL THE DEVELOPMENTS



Learn about the most significant case law and legislative, regulatory and policy updates in Thursday's opening plenary session with annual favorites Marielle Hazen and Rob Clofine.

RECEPTION

All are welcome to the annual PBA Elder Law Section's cocktail reception after Thursday's sessions end at 4:30. Enjoy this time to connect with those who share your practice area.

DHS COUNSEL JOIN US!

Here's your opportunity to ask questions and get some answers from Pennsylvania's Department of Human Services. Speak directly with government representatives and get insights from their perspectives.





TEEPA SNOW IS FRIDAY'S KEYNOTE SPEAKER!

Recognizing Early Signs of Change and the Various Forms of Dementia

In my career as an occupational therapist, I have learned through research and direct care how people living with dementia navigate their world when challenged by the effects of a changing brain.

One of America's leading educators on dementia, Teepa is an advocate for those living with dementia and has made it her personal mission to help families and professionals better understand how it feels to be living with dementia. Her company, Positive Approach, was founded in 2005 and offers education to family and professional care partners all over the world. Her goal? Making a difference...one mind at a time.

In addition to dementia related awareness and knowledge, Teepa teaches effective communication techniques, strategies to connect with clients in a meaningful way, and methods of providing the right resources at the right time.

“*Teepa teaches with compassionate and humor. She provides an absolutely priceless education.*”

BREAKFAST ROUNDTABLES

Gather on Friday at 7:30 am to discuss “not-for-credit topics.” Issues will be thought-provoking, timely and provide ample opportunities for sharing.

- ▶ **Transitioning Your Practice** – Elder law's next generation will lead a discussion on making various transitions in an elder law practice.
 - Facilitators: Robert C. Gerhard, III, Dionysios C. Pappas and Tammy A. Weber
- ▶ **Navigating Financial Institutions – Particularly in Guardianship Matters** – Come to discuss some of the problems and solutions you've experienced with banks.
 - Facilitator: Thomas J. Dempsey, Jr.
- ▶ **Drafting POAs: Tips and Best Practices** – Bring your questions and sample POAs for discussion. We'll also explore the new Act 95 process to get 3rd parties to review and accept POAs and the new immunity provisions.
 - Facilitator: Linda M. Anderson

CREDITS

12 CLE

12 Nursing Home Administrator

14 CPA

SO MUCH IS INCLUDED –

- Breakfasts, lunches and refreshment breaks
- Thursday's cocktail reception hosted by the PBA Elder Law Section
- Over 30 terrific sessions including 4 with ethics credits
- Learning opportunities for your entire staff

SCHEDULE AND SESSION DESCRIPTIONS

7:30 - 8:20 Registration & Continental Breakfast

8:20 - 8:30 Welcome & Introductory Remarks

8:30 - 10:30 **The Year in Review**

MR. CLOFINE, MS. HAZEN



10:30 - 11:00 Break

11:00 - 12:00	1 Medicaid Basics: Eligibility, Spousal Issues, Resource Transfers & More Ms. Alvear, Ms. Harper	2 Update on 1st Party/Payback Special Needs Trusts Ms. Chatha, Mr. Newell	3 Incorporating Health Care Advocacy into Your Elder Law Practice Mr. Rothkoff, Ms. Wizelman	4 Continuing Care Retirement Communities – Are They for Everyone? Mr. Breslin
	12:00 - 1:00 Lunch (included for ALL)			
1:00 - 2:00	5 Medicaid Basics: Walking through the 600L Application Mr. Blumer	6 Special Needs Planning for Special Family Members Ms. Anderson, Mr. Marone	7 Elder Abuse: What All Attorneys Need to Know about This National Legal and Health Crisis Ms. Buck, Ms. Goldberg	8 Pennsylvania Orders for Life Sustaining Treatment (POLST) – What Are They & Where Are They? Ms. Kemp, Mr. Petrich
	2:00 - 2:15 Break			
2:15 - 3:15	9 Drafting the Essential Elder Law Documents Ms. Berk	10 Realty Transfer Taxes and Trusts Mr. Brenner, Mr. Gray	11 Transition Planning for Children with Disabilities: Accessing Public Benefits, Programs and Services Ms. Brooks, Mr. Woody	12 ETHICS Unauthorized Practice of Law, Fee Sharing, Referrals & Other Ethical Issues for Elder Law Attorneys Mr. Hoffmeyer, Mr. Rothkoff
	3:15 - 3:30 Break			
3:30 - 4:30	13 Social Security: Understanding Retirement and Disability Insurance Benefits Mr. Whitelaw	14 Five Problems a Pooled Special Needs Trust Can Solve Mr. Goodall, Ms. Sappington	15 Navigating Estate Recovery & Advocating for Your Client Mr. Foster, Mr. Gerhard	16 ETHICS Bridging the Gap between the Lawyer's and Psychiatrist's Assessment of Diminished Capacity Ms. Breslin, Dr. Panzer
	4:30 - 5:30 Reception sponsored by the PBA Elder Law Section			

JUST THE BASICS
 TRUSTS
 ADVOCACY
 ETHICS

8:30 - 10:30 am

The Year in Review*Mr. Clofine & Ms. Hazen*

In this annual highlight, you will get a quick summary of recent legislative and regulatory developments in elder law and brief summaries of the most significant cases over the past 12 months. You won't want to miss it!

11:00 am – 12:00 pm

JUST THE BASICS

1. Medicaid Basics: Eligibility, Spousal Issues, Resource Transfers & More*Ms. Alvear & Ms. Harper*

If you are new to the practice of Medicaid planning, this session is for you! We will discuss the basics of Medicaid and touch on topics such as eligibility rules, spend-down techniques, asset transfer rules and strategies, annuities and other useful planning strategies.

TRUSTS

2. Update on 1st Party/Payback Special Needs Trusts*Ms. Chatha & Mr. Newell*

First Party Funded Payback Special Needs Trusts (SNTs) are an essential tool in planning for disabled individuals. We will discuss recent changes in administrative agency interpretation and the law (including the Special Needs Fairness Act and introduction of 529A ABLE Accounts) and address the who's, what's, where's, when's and why's of Payback SNTs.

ADVOCACY

3. Incorporating Health Care Advocacy into Your Elder Law Practice*Mr. Rothkoff & Ms. Wizelman*

Our clients and their families are facing challenging health care and medical issues, and often lack the advocacy skills necessary to get quality care. We will address how your elder law practice can be built to help fill this gap and assist your clients in getting the care they deserve. Door prizes!

4. Continuing Care Retirement Communities – Are They for Everyone?*Mr. Breslin*

What are the pros and cons of a CCRC? Are you guaranteed life time care? What if you run out of money, can you count on the benevolent fund? What if the CCRC goes bankrupt, do you lose your refundable deposit? How thorough is the state's review of the financials for a CCRC? These and other questions, including a review of the major contractual issues, will be discussed.

1:00 – 2:00 pm

JUST THE BASICS

5. Medicaid Basics: Walking through the 600L Application*Mr. Blumer*

Getting your client eligible for Medical Assistance is only half the battle — now you need to convince the Department of Human Services of the client's eligibility! Get a step by step guide through the Medical Assistance application and Resource Assessment form. Learn practical tips and how to avoid common mistakes when completing the PA600L.

TRUSTS

6. Special Needs Planning for Special Family Members*Ms. Anderson & Mr. Marone*

Third Party Supplemental Needs Trusts (SNT3) are an important safety net for family members who may be reliant on public benefits or because intellectual or physical disabilities require the careful management and distribution of family resources. We will discuss drafting tips for SNT3, integration of qualified accounts into trust planning and a review of recent developments (ABLE accounts, Military Survivor Benefit Plan).

ADVOCACY

7. Elder Abuse: What All Attorneys Need to Know about This National Legal and Health Crisis*Ms. Buck & Ms. Goldberg*

Elder abuse in all its shocking forms, including physical abuse and financial exploitation, is a national and global legal and health crisis affecting all economic and social sectors and communities. Learn about the extent of this multi-billion dollar crisis and how it devastates the lives of elders and their families, signs of abuse, civil and criminal responses, and resources in the legal and aging networks, presented by attorneys from SeniorLAW Center, a nonprofit law center protecting the rights of older Pennsylvanians.

8. Physician Orders for Life Sustaining Treatment (POLST) - What Are They & Where Are They?*Ms. Kemp & Mr. Petrich*

A POLST form augments Advance Directives for those individuals, of any age, with serious or chronic progressive illness (es) for whom it would be no surprise if they died within a year. We'll provide background on the POLST process and the present status of POLST in PA.

2:15 – 3:15 pm

JUST THE BASICS

9. Drafting the Essential Elder Law Documents*Ms. Berk*

Learn what an elder law attorney's documents provide that distinguishes them from those of the general practitioner. The Last Will and Testament, Durable Power of Attorney and Health Care Power of Attorney and Living Will and other documents, generally form the basis of elder law fundamental elder law practice. Discuss the basic rudiments and drafting options for these documents, standards of "capacity" needed to complete them, practice tips and potential pitfalls.

TRUSTS

10. Realty Transfer Taxes and Trusts*Mr. Brenner & Mr. Gray*

Find out how realty transfer tax is imposed on transfers involving different types of trusts from the Chief Deputy Counsel at the Department of Revenue. Drafting language considerations will be included as well as information on appeals from assessments from an experienced real estate and trusts law practitioner.

ADVOCACY

11. Transition Planning for Children with Disabilities: Accessing Public Benefits, Programs and Services*Ms. Brooks & Mr. Woody*

Transition Planning starts at age 14 and is designed to prepare students (and their families) for life after high school and covers everything from college prep to teaching independent living skills. We will educate you regarding how to plan for and access services for children with disabilities after they graduate.

ETHICS

12. Unauthorized Practice of Law, Fee Sharing, Referrals & Other Ethical Issues for Elder Law Attorneys*Mr. Hoffmeyer & Mr. Rothkoff*

Seniors are faced with increased marketing efforts by non-attorneys to assist with elder planning. Obtain an overview of the types of potential UPL violations, including services of Medicaid and VA advisors. Learn practical tips to combat UPL violations and discuss examples of UPL state prosecutions and other ethical issues including fee sharing and attorney online advertising and reviews.

3:30 – 4:30 pm

JUST THE BASICS

13. Social Security: Understanding Retirement and Disability Insurance Benefits*Mr. Whitelaw*

Discover the various types of benefits available, together with practical tips on how you and your clients can find solutions to complex situations with this often cumbersome bureaucracy.

TRUSTS

14. Five Problems a Pooled Special Needs Trust Can Solve*Mr. Goodall & Ms. Sappington*

In addition to a comprehensive discussion of pooled special needs trusts, we'll compare pooled trusts operating in Pennsylvania and discuss some of the legal and administrative issues that can cause conflict between trustees, beneficiaries and benefits agencies.

ADVOCACY

15. Navigating Estate Recovery & Advocating for Your Client*Mr. Foster & Mr. Gerhard*


DHS estate recovery claim investigators are contacting your clients. Last year they collected \$43,000,000 from the estates of deceased recipients of Medicaid long term care benefits. We'll cover estate recovery procedure, with emphasis on proper advocacy techniques.

ETHICS

16. Bridging the Gap between the Lawyer's and Psychiatrist's Assessment of Diminished Capacity*Ms. Breslin & Dr. Panzer*

Ms. Breslin & Dr. Panzer will help attorneys understand the practical side of assessing diminished capacity pertaining to testamentary capacity, undue influence and guardianship matters. When should you reach out to a psychiatrist/psychologist and seek the services of the experts? What are your ethical duties and best practices?

SCHEDULE AND SESSION DESCRIPTIONS

- 7:30 - 8:20 Registration & Continental Breakfast
- 7:30 - 8:20 **Breakfast Roundtables** [no CLE credit]
- ▶ **Transitioning Your Practice**
 - ▶ **Navigating Financial Institutions – Particularly in Guardianship Matters**
 - ▶ **Drafting POAs: Tips and Best Practices**
- 8:20 - 8:30 Welcome & Introductory Remarks
- 8:30 - 10:00 KEYNOTE ADDRESS
- Recognizing Early Signs of Change and the Various Forms of Dementia**
- TEEPA SNOW
- 
- 10:00 - 10:30 Break

10:30 - 12:00	17	18	19	20
	ABCs & D of Medicare Mr. McKendree	Understanding Financial Products for Long Term Care Mr. Littell, Mr. Vasiliadis	Learning How to Be an Advocate for Those with Dementia Ms. Snow	Community Health Choices, Maximus and More Ms. Chervenak, Ms. Walz

12:00 - 1:00 Lunch (included for ALL)

1:00 - 2:00	21	22	23 ETHICS	24
	Better (Medicaid & VA) Planning through Calculations Ms. Sikov Gross	Repeal and Replace? ACA Changes and the Impact on Health Care for Elders Prof. Campbell	Protecting Clients from Undue Influence Mr. Hagan	Getting the Most out of Tax-Advantaged Retirement Plans Mr. Littell

2:00 - 2:15 Break

2:15 - 3:15	25	26	27	28
	Crisis Planning: Qualifying for Medicaid and Protecting the Community Spouse Ms. Kreisher, Ms. Marshall	Nursing Home Neglect Claims – Practical Considerations for Elder Law Attorneys Mr. Chapman	Veterans’ Benefits and Accessing Admission to VA Facilities Mr. Bender, Ms. Jasper, Mr. Mizdail, Mr. Pappas	Estate Planning Update for Elder Law Attorneys Ms. Trimmer

3:15 - 3:30 Break

3:30 - 4:30	29	30 ETHICS	31
	ABLE Accounts – The Latest Tool in Your Advocacy Toolbox Ms. Andrew, Ms. Schoffstall	How to Get Paid in Orphans’ Court and Comply with the Ethics Rules Mr. Buzard, Mr. Dempsey	“Game of Groans” – DHS Answers/Avoids Your Questions Ms. Breslin (moderator), Ms. Abelson, Mr. Foster, Mr. Newell, Mr. Nicholas

JUST THE BASICS ETHICS

8:30 - 10:00 am

Recognizing Early Signs of Change & the Various Forms of Dementia*Ms. Snow*

Ms. Snow provides specific and distinguishing characteristics of some of the more common forms of dementia including: Alzheimer's disease, vascular dementia, Lewy body dementia, and frontotemporal dementias. She will also focus on how care and expectations may need to be changed for each condition so lawyers can be better advocates for each type.

10:30 am – 12:00 pm

JUST THE BASICS

17. ABCs & D of Medicare*Mr. McKendree*

Learn about: eligibility and enrollment in Medicare, the various components of the Medicare system (Parts A and B, Medigap plans, Medicare Advantage plans, and Part D prescription drug plans).

18. Understanding Financial Products for Long Term Care*Mr. Littell & Mr. Vasiliadis*

Long Term Care Insurance (LTCI) continues to struggle as a funding vehicle for meeting long-term care needs. Americans are more aware of the risk but are not turning to insurance as a solution. We will look at alternative funding approaches including hybrid long-term care and life insurance as well as hybrid annuity products. We will review the tax implications and how these products work. We'll also discuss deferred income annuities as an alternative funding solution. Finally, we review the implications of these products on Medicaid planning.

19. Learning How to Be an Advocate for Those with Dementia*Ms. Snow*

Explore the 'state of the art and science' in delivering the BEST care possible. Learn key features in abilities that signal a change in status and how care and medical procedures should shift to address the whole picture.

20. Community Health Choices, Maximus and More*Ms. Chervenak & Ms. Walz*

DHS is moving rapidly toward its 2018 roll-out of Community Health Choices, which will move the dually eligible population and individuals who receive Medicaid-funded nursing facility or Home and Community Based Services into managed care plans. In the meantime, the shift to using an Independent Enrollment Broker has created lengthy delays and other barriers to accessing Aging Waiver services. And dramatic proposed changes to Medicaid at the federal level may have a profound impact on the future of long term services and supports in Pennsylvania and throughout the nation. We will share the details and discuss the latest developments on all of these critical issues.

1:00 – 2:00 pm

JUST THE BASICS

21. Better (Medicaid & VA) Planning through Calculations*Ms. Sikov Gross*

Learn the basics on how to determine the Community Spouse Resource Allowance, the Community Spouse Monthly Maintenance Needs Allowance, and the amount of VA benefits, if applicable.

22. Repeal and Replace? ACA Changes and the Impact on Health Care for Elders*Mr. Campbell*

The ACA sought to make health care more affordable for elders and persons with disabilities. Examine the status of the ACA as of the summer of 2017, and the impact of changes and proposed changes on the elderly population.

ETHICS

23. Protecting Clients from Undue Influence*Mr. Hagan*

We'll discuss the legal elements of undue influence, including the concept of "weakened intellect," and review the current research that profiles the characteristics of both the victim, and the perpetrator, in an undue influence relationship. A detailed discussion of Rule 1.14 on diminished capacity will be included.

24. Getting the Most out of Tax-Advantaged Retirement Plans*Mr. Littell*

Saving with tax-advantaged plans can provide your clients more retirement security. Learn ways your clients can maximize contributions to qualified plans, IRAs and Roth IRAs. Discuss choosing between tax-deferred and tax-exempt plans. And explore managing the distribution side, from tax treatment, to controlling and managing minimum distributions during lifetime and after death.

2:15 – 3:15 pm

JUST THE BASICS

25. Crisis Planning: Qualifying for Medicaid and Protecting the Community Spouse*Ms. Kreisher & Ms. Marshall*

What options can you offer clients when someone has been admitted to a nursing home, with little or no pre-planning? Learn the rules and discover the crisis planning strategies available for these individuals and couples. We'll go through the calculations for patient-pay liability, MMNA, DRA-compliant annuities, IRAs and taxes.

26. Nursing Home Neglect Claims - Practical Consideration for Elder Law Attorneys*Mr. Chapman*

Nursing home neglect is a real concern for many elderly clients and their families. Experienced advocate and trial attorney Joe Chapman will share how you can protect your clients' constitutional rights and help them avoid becoming the victim of a nursing home neglect claim – without getting involved in the actual prosecution.

27. Veterans' Benefits and Accessing Admission to VA Facilities*Mr. Bender, Ms. Jasper, Mr. Mizdail & Mr. Pappas*

Hear a panel discussion covering topics on (1) information about Pennsylvania's six veterans homes, (2) how a veteran or spouse can apply for admission to a veterans home, (3) calculating the veteran's portion of the maintenance fee requirement, and (4) information about programs and services available to veterans.

28. Estate Planning Update for Elder Law Attorneys*Ms. Trimmer*

As an elder law attorney, wouldn't you love to be brought up-to-date on recent estate law changes – all in one hour? Then join Vicky Trimmer, one of Pennsylvania's most respected estate lawyers and a former attorney with the PA Department of Revenue, as she gives a concise review of federal and Pennsylvania tax changes, the impact of recent probate code changes, and the Orphans' Court rules as they relate to estate planning.

3:30 – 4:30 pm

JUST THE BASICS

29. ABLÉ Accounts: The Latest Tool in Your Advocacy Toolbox*Ms. Andrew & Ms. Schoffstall*

As of April 3, 2017, PA finally has its own ABLÉ program. We will trace the law, guidance and state developments. Which clients qualify for ABLÉ accounts? How can you help clients create and fund ABLÉ accounts? What are the cutting edge, practical applications of ABLÉ accounts? When are SNT's and ABLÉ accounts appropriate? Turn your ABLÉ account questions into practical advice for clients.

ETHICS

30. How to Get Paid in Orphans' Court and Comply with the Ethics Rules*Mr. Buzard & Mr. Dempsey*

Because no guardian or attorney may be paid from a guardianship or minor's estate without court approval, it is important to know when and how to request approval. How can you be paid by the very person whose capacity your client is challenging? What are the limiting factors for attorneys' and guardians' fees? We will explore these questions and more – and the applicable ethics rules.

31. "Game of Groans" - DHS Answers/Avoids Your Questions*Ms. Breslin (moderator), Ms. Abelson, Mr. Foster, Mr. Newell & Mr. Nicholas*

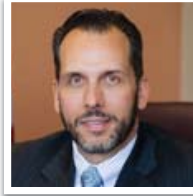
Pennsylvania Department of Human Services legal counsel will give us pointers, answer questions and let us know what's on the horizon. Panelists will address actual fact-patterns from attendees, so be sure to submit your questions to PBI prior to the session.

OUR DEDICATED PLANNING TEAM



Linda M. Anderson, Esq., LLM, CELA
ANDERSON ELDER LAW, LLC, MEDIA

Ms. Anderson focuses her practice on elder law, estate planning, and long term care and special needs planning. She is a member of the Life Care Planning Law Firms Association, National Academy of Elder Law Attorneys and its Pennsylvania Chapter, and the Special Needs Alliance. She is a past chair of the Pennsylvania Bar Association Elder Law Section and a fellow of the American College of Trust and Estate Counsel. She has been selected for inclusion in *Pennsylvania Super Lawyers*® and as one of the Top 50 Women Lawyers in Pennsylvania.



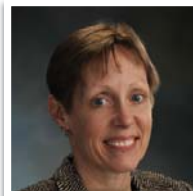
Julian E. Gray, Esq., CELA
JULIAN GRAY ASSOCIATES, PITTSBURGH

Mr. Gray has represented clients in the areas of Medicaid planning, veterans' benefits and special needs planning for over 20 years. He concentrates in the areas of elder law, including estate planning and administration, and related real estate transactions. He has been selected for inclusion in *Pennsylvania Super Lawyers*®, *Best Lawyers in America* and the Special Needs Alliance. He is a past chair of the Pennsylvania Bar Association Elder Law Section and serves on the Board of Directors of the Pennsylvania Chapter of the National Academy of Elder Law Attorneys.



Dana M. Breslin, Esq., CELA
PAPPANO & BRESLIN, BROOKHAVEN

Ms. Breslin formerly managed the Senior Citizen Unit at Delaware County Legal Assistance. Her law practice focuses primarily on the problems of the elderly. She is a certified elder law attorney by the National Elder Law Foundation and is a member of the National Academy of Elder Law Attorneys. She is a past chair of the Pennsylvania Bar Association Elder Law Section. Ms. Breslin is a fellow in the American College of Trust and Estate Counsel. She has been consistently selected for inclusion in *Pennsylvania Super Lawyers*® in estate planning/trusts and elder law.



Sally L. Schoffstall, Esq., CELA
SCHOFFSTALL ELDER LAW, OREFIELD

Ms. Schoffstall has been actively practicing law for 33 years. She is a past chair of the Pennsylvania Bar Association Elder Law Section, and she also serves as treasurer of the Pennsylvania Chapter of the National Academy of Elder Law Attorneys. In 2011, she was presented with the Excellence in Elder Law Award from the Elder Law Section of the Pennsylvania Bar Association, in recognition and appreciation of her superior professional efforts in the field of elder law, significant contributions to the legal profession, and noteworthy service to the elderly.

THANKS TO OUR IMPRESSIVE FACULTY

The willingness of our faculty to share experiences, practice tips and new ideas has become a hallmark of the Elder Law Institute. The faculty will guide you through the many tricky questions that arise in elder law practice so that you can be confident about the advice you are giving and the documents you are drafting.

OUR OUTSTANDING FACULTY

Addie A. Abelson

ASSISTANT COUNSEL, GOVERNOR'S OFFICE OF GENERAL COUNSEL, PA DEPARTMENT OF HUMAN SERVICES
HARRISBURG

Cindy S. Alvear, Esq.

JULIAN GRAY ASSOCIATES, PITTSBURGH

Sarah M. Andrew, Esq.

SCHOFFSTALL ELDER LAW, OREFIELD

Cory E. Bender

SUPERVISOR FOR PROGRAMS & SERVICES
PA DEPARTMENT OF MILITARY & VETERANS AFFAIRS
ANNVILLE

Michelle C. Berk, Esq.

LAW OFFICES OF MICHELLE C. BERK PC
FORT WASHINGTON

William R. Blumer, Esq., CELA

THE LAW FIRM OF LEISAWITZ HELLER, WYOMISSING

John D. Brenner, Jr.

DEPUTY CHIEF COUNSEL, PA DEPARTMENT OF REVENUE
OFFICE OF CHIEF COUNSEL, HARRISBURG

Robert J. Breslin, Jr., Esq.

PAPPANO & BRESLIN, BROOKHAVEN

Julia Brooks

CEO & SENIOR CONSULTANT, PARADIGM SHIFT LLC
BROOMALL

Karen C. Buck, Esq.

EXECUTIVE DIRECTOR, SENIORLAW CENTER
PHILADELPHIA

Daniel P. Buzard, Esq.

SUPERVISOR, GUARDIANSHIP & CIVIL COMMITMENT
DEPARTMENTS, ALLEGHENY COUNTY COURT OF
COMMON PLEAS, ORPHANS' COURT DIVISION
PITTSBURGH

Prof. Michael J. Campbell

VILLANOVA UNIVERSITY SCHOOL OF LAW, VILLANOVA

D. Joseph Chapman, Esq.

SCHMIDT KRAMER PC, HARRISBURG

Nora Gieg Chatha, Esq.

TUCKER ARENSBERG PC, PITTSBURGH

M. Francesca Chervenak, Esq.

SENIOR ATTORNEY AND DIRECTOR
PA HEALTH LAW PROJECT, PITTSBURGH

Robert Clofine, Esq., CELA

THE ELDER LAW FIRM OF ROBERT CLOFINE, YORK

Thomas J. Dempsey, Jr., Esq.

SIKOV & LOVE PA, PITTSBURGH

W. Scott Foster

SENIOR COUNSEL, GOVERNOR'S OFFICE OF GENERAL COUNSEL, PA DEPARTMENT OF HUMAN SERVICES
HARRISBURG

Robert C. Gerhard, III, Esq., CELA

GERHARD & GERHARD LAW OFFICES, JENKINTOWN

Dana N. Goldberg, Esq.

DIRECTOR, VICTIM SERVICES, SENIORLAW CENTER
PHILADELPHIA

H. Amos Goodall, Jr., Esq., CELA

STEINBACHER GOODALL & YURCHAK, STATE COLLEGE

Carol Sikov Gross, Esq., CELA

SIKOV & LOVE PA, PITTSBURGH

Martin J. Hagan, Esq.

MEYER UNKOVIC & SCOTT LLP, PITTSBURGH

Caitlin E. Harper, Esq., CELA

OF COUNSEL, JULIAN GRAY ASSOCIATES, PITTSBURGH

Marielle F. Hazen, Esq., CELA

HAZEN LAW GROUP, HARRISBURG

William F. Hoffmeyer, Esq.

HOFFMEYER & SEMMELMAN LLP, YORK

Sharan L. Jasper, NHA

ADMINISTRATIVE OFFICER, REVENUE OFFICES
PA DEPARTMENT OF MILITARY & VETERANS AFFAIRS
ANNVILLE

Marian Kemp, RN

PA POLST COORDINATOR, COALITION FOR QUALITY AT
THE END OF LIFE, PITTSBURGH

Marianne E. Kreisher, Esq., CELA

LAW OFFICES OF KREISHER & GREGOROWICZ
BLOOMSBURG

David A. Littell, JD, ChFC®

PROFESSOR OF TAXATION, AMERICAN COLLEGE OF
FINANCIAL SERVICES, ARDMORE

Anthony L. Marone, Esq.

MCANDREWS LAW OFFICES PC, BERWYN

Marissa B. Marshall, Esq., CELA

LAW OFFICES OF KREISHER & GREGOROWICZ
BLOOMSBURG

William McKendree, JD, MPA

SUPERVISOR, APPRISE PROGRAM OF ALLEGHENY
COUNTY, PITTSBURGH

Eugene Mizdail

ADMISSIONS AND MARKETING COORDINATOR, BUREAU
OF VETERANS HOMES, PA DEPARTMENT OF MILITARY AND
VETERANS AFFAIRS, ANNVILLE

Mark J. Newell

SENIOR COUNSEL, GOVERNOR'S OFFICE OF GENERAL
COUNSEL, PA DEPARTMENT OF HUMAN SERVICES
PHILADELPHIA

Taylor R. Nicholas

ASSISTANT COUNSEL, GOVERNOR'S OFFICE OF GENERAL
COUNSEL, PA DEPARTMENT OF HUMAN SERVICES
PITTSBURGH

Dale E. Panzer, M.D.

CLINICAL AND FORENSIC PSYCHIATRIST, BALA CYNWYD

Dionysios C. Pappas, Esq.

VASILIADES & ASSOCIATES, BETHLEHEM

Frank A. Petrich, Esq., CELA, CFP

ELDER LAW OFFICES OF FRANK A. PETRICH, PITTSBURGH

Jerold E. Rothkoff, Esq., CELA

ROTHKOFF LAW GROUP, CHERRY HILL, NJ

Anna Sappington, Esq.

SAPPINGTON LAW, GLENSIDE

Teepa Snow, MS, OTR/L, FAOTA

POSITIVE APPROACH LLC, EFLAND, NC

Vicky Ann Trimmer, Esq., CPA

DALEY ZUCKER MELTON & MINER LLC, LEMOYNE

Stanley M. Vasiliadis, Esq., CELA

VASILIADES & ASSOCIATES, BETHLEHEM

Pamela Walz, Esq.

CO-DIRECTOR, AGING AND DISABILITIES UNIT
COMMUNITY LEGAL SERVICES, PHILADELPHIA

John S. Whitelaw, Esq.

CO-DIRECTOR, AGING AND DISABILITIES UNIT
COMMUNITY LEGAL SERVICES, PHILADELPHIA

Leslie Wizelman, Esq., CELA

WIZELMAN ELDER LAW, WYALUSING

D. Daniel Woody, Esq.

WOODY LAW OFFICES PC, MEDIA



*You will pick up something new or noteworthy
in every session you attend.*



HOTEL ACCOMMODATIONS

Harrisburg Hilton
2nd & Market Streets

Why wait? Don't risk a sellout—reserve your overnight room today!
Contact the Hilton directly at (717) 233-6000, and the reduced rate of \$138 is yours when you mention code PBI020. Rate guaranteed until 7/7/2017 or when block is full, whichever comes first.

DIRECTIONS

From Interstate 83, take Harrisburg exit 43 (Second Street—Capitol Complex) north on Second Street to Market Square. Amtrak is located two blocks east at the Harrisburg Transportation Center.

The Harrisburg Hilton is centrally located near popular Gettysburg, Hershey and Lancaster attractions.

FROM PHILADELPHIA AND HARRISBURG AIRPORT*

Take PA Turnpike (I-76) West to Exit 247
*Follow I-283 North approximately 3 miles to I-83 South Harrisburg Exit 43 (Second Street, Capitol Complex)
Follow Second Street to the 4th Traffic Light (at Market St.)
Harrisburg Hilton is across the street on your right.

FROM PITTSBURGH

Take PA Turnpike (I-76) East to Exit 242
Follow I-83 North
Harrisburg Exit 43 (Second St., Capitol Complex)
Follow Second Street to the 4th Traffic Light (at Market St.)
Harrisburg Hilton is across the street on your right.

FROM WASHINGTON & BALTIMORE AREAS

Take the Beltway (495) to Interstate 83 North
Harrisburg Exit 43 (Second Street, Capitol Complex)
Follow Second Street to the 4th Traffic Light (at Market St.)
Harrisburg Hilton is across the street on your right

SPECIAL THANKS TO OUR SPONSORS & EXHIBITORS

GOLD SPONSOR



Pennsylvania Care Management (PCM)

SILVER SPONSORS



EXHIBITORS



Registration Policy: Pre-registered customers will receive priority on the distribution of course materials. Walk-in registrations will be accepted on a space-available basis. Please check www.pbi.org or call (800) 247-4724 to confirm space is available and the schedule has not changed.

Registration Transfers: Requests for transfers will be honored if they are received before the course date.

Nursing Home Administrator Credits: Approval for professional education credit by the Pennsylvania State Board of Examiners of Nursing Home Administrators is pending.

CLE Credits: Each day of this Institute has been approved by the Pennsylvania Continuing Legal Education Board for 6 hours of CLE credit. Workshop choices will determine whether credits are in substantive law, practice and procedure or ethics, professionalism or substance abuse.

Services for Persons with Disabilities: If you require special arrangements, please contact Customer Service at (800) 932-4637 at least ten days before the course date.

Speaker Substitutions: PBI reserves the right to substitute speakers at all programs.

PBI Scholarships: PBI offers substantially reduced tuition for most PBI seminars to allow attorneys experiencing financial hardship to fulfill their mandatory education requirement. For details and an application, contact Scholarship Administrator at scholarships@pbi.org or (800) 932-4637, ext. 2284 at least 30 days before the program. (Scholarships are not available for Online CLE.)

Legal Services/Public Interest Lawyers: PBI will provide a complete waiver of tuition fees for the first 12 hours of CLE taken to satisfy the Pennsylvania mandatory CLE requirement in any calendar year for all attorneys employed on a full-time basis by Pennsylvania civil or criminal Section 501(c)(3) legal services or public interest organizations. For additional courses (over and above the first 12 hours), eligible attorneys may enroll at 50 percent of the highest member fee. This waiver applies only to attorneys in Section 501(c)(3) organizations that provide legal services at no or de minimus fee to individual members of the public.

Registration Confirmation: To receive a confirmation, please be sure to include your email address on the registration form.

Weather Related Cancellations: Check www.pbi.org or call (800)-932-4637 ext. 2205.

20TH ANNUAL ELDER LAW INSTITUTE

Harrisburg | Thu. & Fri., July 20 & 21, 2017

HARRISBURG HILTON, 2ND & MARKET STREETS

8:20 am – 4:30 pm; check-in and continental breakfast begin at 7:30 am both days

2-DAY TUITION
(COURSE BOOKS OR USB DRIVE, CONTINENTAL BREAKFASTS,
REFRESHMENT BREAKS AND LUNCHEONS)

- \$575 Standard
- \$288 Attorneys admitted after 1/1/13,
Paralegals & Judicial Law Clerks

1-DAY TUITION
(COURSE BOOK OR USB DRIVE, CONTINENTAL BREAKFAST,
REFRESHMENT BREAKS AND LUNCHEON)

- Thu., July 20 Fri., July 21
- \$350 Standard
- \$175 Attorneys admitted after 1/1/13,
Paralegals & Judicial Law Clerks

USB DRIVE OR BOOK AVAILABLE

If no preference is specified, you will receive the printed version.

- I'd like the **USB DRIVE VERSION (TD-9416)** of the Institute materials.
- I'd like the **PRINTED VERSION (2017-9416)** of the Institute materials.
- COURSE BOOK and USB DRIVE** (additional \$50)

I cannot attend, but I would like to purchase the:

- COURSE BOOK (2017-9416): \$149**
Include \$8.00 shipping and handling and \$9.42 sales tax for a total of \$166.42
- USB DRIVE (TD-9416): \$149**
Include \$8.00 shipping and handling and \$9.42 sales tax for a total of \$166.42

If you are ordering course materials separately, please allow two weeks after the course for the shipment of books

Name _____ Attorney # _____

Firm _____

Address _____ City _____ State _____ Zip _____

Phone () - _____ Fax () - _____

Email address _____


A CHECK made payable to PBI for \$ _____ is enclosed

CHARGE my: American Express MasterCard Visa Discover

Card # _____ Exp. _____

Signature _____

FOUR EASY WAYS TO REGISTER!

 **MAIL**
PBI, 5080 Ritter Rd.
Mechanicsburg, PA 17055

 **FAX**
717-796-2348

 **PHONE**
717-796-0804

 **www.pbi.org**



5080 Ritter Road
Mechanicsburg, PA 17055-6903



*PBI is pleased to cosponsor
this program with the PBA Elder Law
Section*

NONPROFIT ORG.
U.S. POSTAGE
PAID
Pennsylvania Bar
Institute

20TH ANNUAL

ELDER LAW INSTITUTE

HARRISBURG

THU. & FRI., JULY 20 & 21, 2017

HARRISBURG HILTON
2nd & Market Streets

8:20 AM TO 4:30 PM BOTH DAYS

**CHECK-IN AND CONTINENTAL BREAKFAST
BEGIN AT 7:30 AM BOTH DAYS**

6 REASONS YOU'LL WANT TO ATTEND THE 20TH ANNIVERSARY OF THIS INSTITUTE

- ▶ Design your own program — select from **over 30 workshops**
- ▶ Hear from **over 50 leading elder law professionals**
- ▶ **Share experiences**, practice tips and new ideas
- ▶ Get a refresher on the fundamentals and **find answers** to more complex issues
- ▶ Receive **valuable course materials** in bound books or on a searchable USB drive
- ▶ Visit with our **sponsors and exhibitors**