



The Florida Bar Continuing Legal Education Committee and the Elder Law
Section present



The Elder Law Certification Review Course

COURSE CLASSIFICATION: ADVANCED LEVEL

**January 14 - 15, 2010
JW Marriott Grande Lakes/Orlando
4040 Central Florida Parkway
Orlando, FL 32837
(407) 206-2300**

Thank you

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Guardian Pooled Trust**

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E.P.I.C., LLC & SunTrust**

Course No. 0981R

Schedule of Events

Thursday, January 14, 2010

7:50 a.m. – 8:20 a.m.

Late Registration – Continental Breakfast

8:20 a.m. – 8:30 a.m.

Welcome and Announcements

Len Mondschein, Miami

8:30 a.m. – 9:20 a.m.

Health Care Directives and Proxies

Scott Solkoff, Delray Beach

9:20 a.m. – 10:10 a.m.

Pre-Mortem Legal Planning

Nikki Boone Melby, Brevard, NC

10:10 a.m. – 10:30 a.m.

Break

10:30 a.m. – 11:20 a.m.

Probate, Elective Share and Homestead

Mike Pyle, Daytona Beach

11:20 a.m. – 12:00 p.m.

Trust Administration

Patrick Lannon, Coral Gables

12:00 p.m. – 1:10 p.m.

Lunch (included in registration fee)

1:10 p.m. – 2:00 p.m.

Social Security

David Lillesand, Miami

2:00 p.m. – 2:30 p.m.

Special Needs Trust

David Lillesand, Miami

2:30 p.m. – 2:50 p.m.

Break

2:50 p.m. – 3:40 p.m.

Long Term Care Insurance, Annuities, and Reverse Mortgages

Joe Karp, Palm Beach Gardens

3:40 p.m. – 4:10 p.m.

Age/Disability Discrimination

Gary Anton, Tallahassee

4:10 p.m. – 4:40 p.m.

Administrative Advocacy

Ellen Morris, Boca Raton

4:45 p.m. – 5:45 p.m.

Reception – All Attendees Invited

Friday, January 15, 2010

7:50 a.m. – 8:20 a.m.

Continental Breakfast

8:30 a.m. – 9:20 a.m.

Guardianship

Enrique Zamora, Miami

9:20 a.m. – 9:50 a.m.

Medicare

Representative – Center for Medicare Advocacy, National Office, Connecticut

9:50 a.m. – 10:00 a.m.

Break

10:00 a.m. – 10:50 a.m.

Medicaid Planning after DRA

Howie Krooks, Boca Raton

10:50 a.m. – 11:20 a.m.

Housing Options

Victoria Heuler, Tallahassee

11:20 a.m. – 12:10 p.m.

Ethics

Rebecca Morgan, St. Petersburg, Roberta K. Flowers, St. Petersburg

12:10 p.m. – 1:10 p.m.

Lunch (included in registration fee)

1:10 p.m. – 1:40 p.m.

Nursing Home Torts/Resident Rights

Ed Boyer, Sarasota

1:40 p.m. – 2:10 p.m.

VA Benefits

Alice Reiter Feld, Tamarac

2:10 p.m. – 3:00 p.m.

Litigating for the Elder Law Attorney

Twyla Sketchley, Tallahassee

3:00 p.m. – 3:20 p.m.

Break

3:20 p.m. – 3:50 p.m.

Tax

Steve Kotler, Naples

3:50 p.m. – 4:20 p.m.

Abuse, Neglect, and Exploitation

Erika Dine, Bradenton

4:20 p.m. – 4:50 p.m.

Tips for Certification Exam

Len Mondschein, Miami, Marjorie Wolasky, Miami, Jana McConnaughay, Tallahassee, and Enrique Zamora, Miami



HOTEL RESERVATIONS

A block of rooms has been reserved at the JW Marriott Grande Lakes/Orlando, at the rate of \$159 single/double occupancy. To make reservations, call the JW Marriott Grande Lakes/Orlando directly at 1-800-228-9290. Reservations must be made by 12/23/09 to assure the group rate and availability. After that date, the group rate will be granted on a "space available" basis.

CLE CREDIT

CLER PROGRAM

(Max. Credit: 16.0 hours)

General: 16.0 hours Ethics: 1.0 hour

CERTIFICATION PROGRAM

(Max. Credit: 16.0 hours)

Elder Law: 16.0 hours Health Law: 8.0 hours

Tax Law: 3.5 hours Wills, Trusts & Estates: 16.0 hours

Seminar credit may be applied to satisfy CLER / Certification requirements in the amounts specified above, not to exceed the maximum credit. See the CLE link at www.floridabar.org for more information.

Prior to your CLER reporting date (located on the mailing label of your Florida Bar News or available in your CLE record on-line) you will be sent a Reporting Affidavit if you have not completed your required hours (must be returned by your CLER reporting date).

ELDER LAW SECTION

Babette Bach, Sarasota — Chair

Leonard Mondschein, Miami — Chair-elect

David Hook, New Port Richey — CLE Chair

Leonard Mondschein, Miami — Program Chair

REFUND POLICY: Requests for refund or credit toward the purchase of the audio CD or course books for this program **must be in writing and postmarked** no later than two business days following the course presentation. Registration fees are non-transferrable, unless transferred to a colleague registering at the same price paid. A \$25 service fee applies to refund requests. Registrants who do not notify The Florida Bar by 5:00 p.m., January 4, 2009 that they will be unable to attend the seminar, will have an additional \$60 retained. Persons attending under the policy of fee waivers will be required to pay \$60.

Those who have applied to take the certification exam may find this course a useful tool in preparing for the exam. It is developed and conducted without any involvement or endorsement by the BLSE and/or Certification committees. Those who have developed the program, however, have significant experience in their field and have tried to include topics the exam may cover. Candidates for certification who take this course should not assume that the course material will cover all topics on the examination.

TO REGISTER



ON-LINE:
www.floridabar.org/CLE



MAIL:
Completed form with check



FAX:
Completed form to 850/561-5816

Registration

Register me for "The Elder Law Certification Review Course."

ONE LOCATION: (309) JW MARRIOTT GRANDE LAKES, ORLANDO (JANUARY 14-15, 2010)

TO REGISTER OR ORDER AUDIO CD OR COURSE BOOKS, BY MAIL, SEND THIS FORM TO: The Florida Bar, Order Entry Department: 651 E. Jefferson Street, Tallahassee, FL 32399-2300 with a check in the appropriate amount payable to The Florida Bar or credit card information filled in below. If you have questions, call 850/561-5831. ON-SITE REGISTRATION, ADD \$25.00. **On-site registration is by check only.**

Name _____ Florida Bar # _____

Address _____

City/State/Zip _____ Phone # _____

AJC: Course No. 0981R

REGISTRATION FEE (CHECK ONE):

- Member of the Elder Law Section: \$265
- Non-section member: \$290
- Full-time law college faculty or full-time law student: \$195
- Persons attending under the policy of fee waivers: \$60
Includes Supreme Court, DCA, Circuit and County Judges, Magistrates, Judges of Compensation Claims, Administrative Law Judges, and full-time legal aid attorneys if directly related to their client practice. (We reserve the right to verify employment.) Fee Waivers are only applicable for in-person attendees.

METHOD OF PAYMENT (CHECK ONE):

- Check enclosed made payable to The Florida Bar
- Credit Card (Advance registration only. Fax to 850/561-5816.)
- MASTERCARD VISA DISCOVER AMEX Exp. Date: ____/____ (MO./YR.)

Signature: _____

Name on Card: _____ Billing Zip Code: _____

Card No. _____



Check here if you have a disability that may require special attention or services. Please attach a general description of your needs. You will be contacted for further coordination.

- Enclosed is my separate check in the amount of \$50 to join the Elder Law Section. Membership expires June 30, 2010.

COURSE BOOK - AUDIO CD - ON-LINE - PUBLICATIONS

Private taping of this program is not permitted. **Delivery time is 4 to 6 weeks after 1/15/10. TO ORDER AUDIO CD OR COURSE BOOKS**, fill out the order form above, including a street address for delivery. **Please add sales tax to the price of tapes or books. Tax exempt entities must pay the non-section member price.**

Please include sales tax unless ordering party is tax-exempt or a nonresident of Florida. If this order is to be purchased by a tax-exempt organization, the course book/tapes must be mailed to that organization and not to a person. Include tax-exempt number beside organization's name on the order form.

COURSE BOOK
Cost \$50 plus tax
(Certification/CLER credit is not awarded for the purchase of the course book only.)

TOTAL \$ _____

AUDIO CD
(includes course book)
\$265 + tax (section member)
\$290 + tax (non-section member)

TOTAL \$ _____