

CLE CREDIT

CLER PROGRAM

(Maximum Credit: 11.0 hours)

General: 11.0 hours

Ethics: 1.0 hour

CERTIFICATION PROGRAM

(Maximum Credit: 11.0 hours)

Elder Law: 11.0 hours

Health Law: 11.0 hours

Wills, Trusts & Estates: 11.0 hours

Seminar credit may be applied to satisfy both CLER and Board Certification requirements in the amounts specified above, not to exceed the maximum credit. Refer to Chapter 6, Rules Regulating The Florida Bar, for more information about the CLER and Certification Requirements.

Prior to your CLER reporting date (located on the mailing label of your Florida Bar News) you will be sent a Reporting Affidavit or a Notice of Compliance. The Reporting Affidavit must be returned by your CLER reporting date. The Notice of Compliance confirms your completion of the requirement according to Bar records and therefore does not need to be returned. You are encouraged to maintain records of your CLE hours.



ELDER LAW SECTION

Emma Hemness, Brandon — Chair

Linda Chamberlain, Clearwater — Chair-elect

Jacqueline Schneider, N. Miami Beach — CLE Chair

CLE COMMITTEE

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Rep DeLoach, Seminole — Program Co-Chair

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The Florida Bar
651 E. Jefferson Street
Tallahassee, FL 32399-2300



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

Elder Law Certification Review Course

COURSE CLASSIFICATION: ADVANCED LEVEL

Course book
contains hard-to-find
forms and CD of course
materials!

ONE LOCATION:

January 24 - 25, 2008

Florida Hotel

Florida Mall

1500 Sand Lake Road

Orlando, FL 32809

407/859-1500

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.

Course No. 0575R

Schedule of Events

This is your chance to listen to the experts review topics and subject matter confronting the elder law practitioner. Hear the latest on Medicaid planning post-Deficit Reduction Act, among other exciting topics. This review course is not limited to only those taking the certification exam in elder law.

Thursday January 24, 2008

8:00 a.m. – 8:20 a.m.

Late Registration

8:20 a.m. – 8:30 a.m.

Opening Remarks

8:30 a.m. – 9:20 a.m.

Probate and Trust Administration– Probate update, avoiding litigation, creditor issues, and homestead considerations

Travis Finchum, Clearwater

9:20 a.m. – 10:10 a.m.

Incapacity, Guardianship and Ethical Considerations

Level of capacity required for signing documents, guardianship hot topics, ethical considerations when representing the confused, but not incapacitated client

Babette Bach, Tampa

10:10 a.m. – 10:30 a.m.

Break

10:30 a.m. – 11:00 a.m.

Health Care Planning and End of Life Decision Making

Best Interest vs. Substituted Judgment: A review of Chapter 765

Scott Solkoff, Boyton Beach

11:00 a.m. – 11:30 a.m.

VA Benefits

Veteran and Survivor Benefits, eligibility requirements

Laura Rotstein, Lauderhill

11:30 a.m. - 12:00 noon

Litigation and Administrative Advocacy

Fair Hearings, what's required, how to prepare and succeed

Ellen Morris, Boca Raton

12:00 p.m. – 1:00 p.m.

Lunch (included in registration)

1:00 p.m. – 1:50 p.m.

Medicare Benefits

Medicare: Parts A - D, including what to know when your client calls

Kara Evans, Tampa

1:50 p.m. – 2:40 p.m.

Long Term Care Insurance and Annuities

Review of Long Term Care Partnership policies and other practical information

Leonard Mondschein, Miami

2:40 p.m. – 3:00 p.m.

Break

3:00 p.m. – 3:50 p.m.

SSI, SSD and Survivor Benefits

Review of SSI, SSD and Survivor Benefits, the differences between the benefits, and eligibility requirements for each program

David Lillesand, Miami

3:50 p.m. – 4:20 p.m.

Tax Issues

Relevant estate, gift and income tax issues

Martin Cohen, Fort Lauderdale

Friday, January 25, 2008

8:30 a.m. – 9:20 a.m.

Trusts, Wills and Elective Share - Chapter 736

What you need to know to make sure your trusts are compliant with the new statute

Sandra Diamond, Seminole

9:20 a.m. – 9:50 a.m.

Resident Rights

The rules that nursing home attorneys know by heart

Twyla Sketchley, Tallahassee

9:50 a.m. – 10:10 a.m.

Break

10:10 a.m. – 11:00 a.m.

Medicaid Eligibility, Qualifications, and DRA

General eligibility and planning strategies under DRA

Emma Hemness, Brandon

11:00 a.m. – 11:30 a.m.

Housing Options for your Elderly Client

Section 8 and more

Victoria Hueler, Tallahassee

11:30 a.m. – 12:00 noon

Exploitation of the Elderly

Rules for everyone to know

Carolyn Sawyer, Orlando

12:30 p.m. – 2:00 p.m.

Elder Law Section Executive Council Meeting

(Lunch included in registration)

All Members Invited. Non-members, RSVP required

HOTEL RESERVATIONS: A block of rooms has been reserved at the Florida Hotel, at the rate of \$159 single/double occupancy. To make reservations, call the Florida Hotel directly at (800) 588-4656. Reservations must be made by 01/02/08 to assure the group rate and availability. After that date, the group rate will be granted on a "space available" basis.

REFUND POLICY: Requests for refund or credit toward the purchase of audio/CD or course book of 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 17, 2008 that they will be unable to attend the seminar will have an additional \$30 retained. Persons attending under the policy of fee waivers will be required to pay \$30.



Registration

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

(118) FLORIDA HOTEL, ORLANDO JANUARY 24 - 25, 2008

TO REGISTER OR ORDER AUDIO OR COURSE BOOKS, MAIL THIS FORM TO: The Florida Bar, CLE Programs, 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. 0575R

REGISTRATION FEE (CHECK ONE):

- Member of the Elder Law Section: \$270
- Non-section member: \$295
- Full-time law college faculty or full-time law student: \$162
- Persons attending under the policy of fee waivers: \$30
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.)

METHOD OF PAYMENT (CHECK ONE):

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

Signature: _____

Name on Card: _____

Card No. _____



- Please check here if you have a disability that may require special attention or services. To ensure availability of appropriate accommodations, attach a general description of your needs. We will contact you for further coordination.

COURSE BOOK – AUDIO/CD – ON-LINE – PUBLICATIONS

Private taping of this program is not permitted. **Delivery time is 4 to 6 weeks after 01/25/08. TO ORDER AUDIO 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

INCLUDES CD-ROM.
Cost \$50 plus tax
(Certification/CLER credit is not awarded for the purchase of the course book only.)

TOTAL \$ _____

AUDIO CD

(includes course book & CD)
\$270 plus tax
(section member)
\$295 plus tax
(non-section member)

TOTAL \$ _____

AUDIOTAPES

(includes course book & CD)
\$270 plus tax
(section member)
\$295 plus tax
(non-section member)

TOTAL \$ _____

ON-LINE PROGRAMS! To view and/or listen to this and other courses on-line, or to download to your computer as a "CLEtoGo," go to www.legalspan.com/TFB/catalog.asp

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