

CLE22-005

REGISTRATION INFO

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SELECT LOCATION

Columbus Live Interactive Webinar

PROGRAM PRICING *(INCLUDES ELECTRONIC MATERIALS ONLY)*

	Membership VP+ and Membership	Non-member
Day 1	<input type="radio"/> \$237.50	<input type="radio"/> \$297
Day 2	<input type="radio"/> \$237.50	<input type="radio"/> \$297
Full Conference (In person at the OSBA)	<input type="radio"/> \$475	<input type="radio"/> \$594

If you are attending the full institute as a Live Interactive Webinar, be sure to register for both days in the CLE store.

Register for Day 1: OhioBar.org/CLE22-005LIW (Live Interactive Webinar)

Register for Day 2: OhioBar.org/CLE22-005LIW-day2 (Live Interactive Webinar)

GROUP DISCOUNT: Three or more registrants from the same office receive \$25 off per registrant when registering for the full two-day conference. Registrations must be submitted at the same time to be eligible.

FORM OF PAYMENT

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P.O. BOX 16562
COLUMBUS, OHIO 43216-6562



Return Service Requested

2022 Ohio Elder Law Institute

DATES AND LOCATION:
MAR 10 | 8:25AM - 4PM
MAR 11 | 8:25AM - 4PM

In-Person: Ohio Bar Headquarters
Ohio State Bar Association,
1700 Lake Shore Drive, Columbus, 43204

Virtual: Live Interactive Webinar

ACCOMMODATIONS:
Hyatt Place Columbus/OSU
795 Yard St, Columbus, OH 43212
Phone: 614-280-1234

Contact [Hyatt Place Columbus/OSU](http://HyattPlaceColumbus/OSU)
if booking online, use the group code 36133.



12.0 HOURS

Mar 10-11

The CLE You Need,
The Way You Want It



2022 Ohio Elder Law Institute

It's Your Choice – Live CLE Credit:
Join Us In-Person or via Webcast

12.0 HOURS
Qualifies for Elder Law and Estate Planning,
Trust and Probate Law Specialization

1.0 HOUR
Qualifies for Professional Conduct

This year's Institute will provide sessions on retirement planning under the SECURE Act, MyCare Ohio, penalty-free Medicaid transfers, the benefits of grief counseling for your clients, PASSPORT waiver applications, alternative payment for home or facility-based care and Medicaid estate recovery.

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DESCRIPTION

This year's Institute will provide sessions on retirement planning under the SECURE Act, MyCare Ohio, penalty-free Medicaid transfers, the benefits of grief counseling for your clients, PASSPORT waiver applications, alternative payment for home or facility-based care and Medicaid estate recovery.

PLANNING CO-CHAIRS:

Elizabeth A. Durnell-Maier, Esq.; OSBA Certified Specialist; Durnell Maier Law; Sidney
Allan P. Sweet, Esq.; Palumbo & Sweet; Akron

PLANNING COMMITTEE:

Christina M. Bushnell, Esq.; McFadden Bushnell LLC; Cleveland
Kimberly C. Estess, Esq.; OSBA Certified Specialist; O'Diam and Estess Law Group; Dayton
Dawn E. McFadden, Esq.; McFadden Bushnell LLC; Cleveland
Jessica N. Roshon, Esq.; Taps Sutton & Roshon, LLC; Columbus
Laurie G. Steiner, Esq.; CELA, OSBA Certified Specialist; Solomon, Steiner & Peck, Ltd.; Mayfield Heights

PROGRAM AGENDA

DAY 1: THURSDAY, MARCH 10



8:25 Welcome/Introduction

Ashley Shannon Burke, Esq.; OSBA Certified Specialist; OSBA Elder and Special Needs Law Section Chair; Burke & Pecquet LLC; Blue Ash
Institute Planning Co-Chairs: Elizabeth A. Durnell-Maier and Allan P. Sweet

8:30 Penalty-Free Transfers? Yes, Please

With the Medicaid spend-down, it's best to determine if assets can be transferred without incurring a Medicaid restricted coverage period. We'll go over the penalty-free transfers and discuss tips to use them to their fullest advantage for your clients.

Elizabeth A. Durnell-Maier, Esq.; OSBA Certified Specialist; Durnell Maier Law; Sidney
Allan P. Sweet, Esq.; Palumbo & Sweet; Akron

9:30 MyCare Ohio: What Is It, and Is It Good for My Client?

MyCare Ohio is an Ohio-sponsored managed care program for people with both Medicare and Medicaid coverage. It is now available in 29 Ohio counties, and the premiums charged are potentially subject to Medicaid Estate Recovery. Join this panel discussion to learn more about the program, as well as how to advise your clients regarding enrollment or waiver of enrollment in the program.

Moderator: Jessica N. Roshon, Esq.; Taps Sutton & Roshon, LLC; Columbus

Panelists:

James Koewler, Esq.; The Koewler Law Firm, Inc.; Richfield
Amber Knecht; Regional Program Director, MyCare Ohio Specialist; Sponsored by Easterseals Central Southeast Ohio; Hilliard
Zane Smiddy; Assistant Program Director; Sponsored by Easterseals Central Southeast Ohio; Hilliard

10:30 Break

10:45 Retirement Planning Under the New Rules

It's been two years since the Setting Every Community Up for Retirement Enhancement Act (SECURE Act) was passed. What planning strategies are available to help clients direct the use of their retirement funds and save on income tax? This presentation will focus on the use of Roth conversions, stretch IRAs and charitable trusts to maximize qualified funds.

Gregory S. DuPont, Esq.; Gregory S. DuPont, Ltd.; Dublin

11:45 Lunch Provided for In-Person Attendees

12:45 Grief Counseling

Clients are often experiencing grief when they interact with elder law attorneys - whether due to the loss of loved one, addressing an accident that has resulted in a disability or planning due to a physical decline that has resulted in a loss of independence. This session will discuss the topic of grief and how by better understanding grief, we can recognize it and support our clients while helping them achieve their goals during a difficult time.

Moderator: Christina M. Bushnell, Esq.; McFadden Bushnell LLC; Cleveland

Panelists:

Kimberly C. Estess, Esq.; CELA; OSBA Certified Specialist; O'Diam and Estess Law Group; Dayton
Jalayne Nadal, MSW, LSW; Bereavement Coordinator, Crossroads Hospice and Palliative Care; Dayton
Heather Nicol, LSW-S; Clinical Director, Cornerstone of Hope; Columbus

1:45 Avoiding Spousal Impoverishment While Staying at Home: Issues To Consider

Topics include:

- Rolling snapshot: Home & Community Based Services.
- Snapshot calculations: Skilled Nursing Facilities /Hospital.
- Eligibility calculations.
- Separation of assets post-eligibility and Medicaid Estate Recovery.

Lindsay C. Jones, Esq.; Schraff Thomas Law LLC; Willoughby

Ashley Shannon Burke, Esq.; OSBA Certified Specialist; Burke & Pecquet LLC; Blue Ash

2:45 Break

3:00 PASSPORT Applications and Level of Care Determinations

Not only do PASSPORT waiver applications have special complex requirements, but they must also be coordinated between the Departments of Aging, Medicaid and Job and Family Services. An understanding of these rules, and where communication breakdowns may occur, is critical. This session will also look behind the scenes at Level of Care Determinations and how to overcome hurdles that may arise.

Daniel P. Seink, Esq.; OSBA Certified Specialist; Daniel P. Seink Co., Ltd.; Brecksville

Kathy J. Cline, LSW, GCM; Daniel P. Seink Co., Ltd.; Brecksville

4:00 Day One Concludes

DAY 2: FRIDAY, MARCH 11

8:25 Welcome/Introductions

Ashley Shannon Burke, Esq.; OSBA Certified Specialist; Burke & Pecquet LLC; Blue Ash
Institute Planning Co-Chairs: Elizabeth A. Durnell-Maier and Allan P. Sweet

8:30 Making Your Work Flow: The Secret to Managing Your Practice

By instituting practice management systems, small and solo law firms can better serve their clients and provide consistent, high-quality work product. This session will help attorneys identify the current (and often default) processes that your firm uses, design processes that will keep your team making coordinated progress and identify technology tools that will allow you to systemize your firm.

Melanie Leonard; Founder & CEO, streamlined.legal; Naperville, Ill.

9:30 Case Law Update

Maggie L. Sutton, Esq.; Taps Sutton & Roshon, LLC; Columbus

10:30 Break

10:45 Professional Conduct for the Elder Law Attorney

Kimberly C. Estess, Esq.; OSBA Certified Specialist; O'Diam and Estess Law Group; Dayton

Rachael A. Houck, Esq.; Houck Menninger Law, LLC; Dayton

11:45 Lunch Provided for In-Person Attendees

12:45 Dirty Deeds Done Dirt Cheap – How to Make Sure Your Real Estate Transactions Don't Cause Title Issues Down the Road

The formalities of transferring real property are often fumbled. This presentation will offer a title company's perspective on how to get your transfers right so they don't cause title issues in the future, with a focus on common elder law real property transactions.

Paul E. Blevins, Esq. and Lawrence S. Press, Esq.; First American Title Insurance Company; Dublin

Richard A. Myers, Jr., Esq.; Richard A. Myers, Jr. & Associates, LLC; Westlake

1:45 Government Benefits Aren't the Only Way To Pay for Long-Term Care: Alternatives You Should Know

Long-term care doesn't automatically need to mean Medicaid benefits. For your clients who can't qualify for or chose not to apply for Medicaid, there are other methods of payment for home or facility-based care. Learn about long-term care insurance (either personal or business), hybrid annuities and life insurance policies, reverse mortgages and Veteran's benefits: just some alternative methods you need in your arsenal to fully advise your clients.

Laurie G. Steiner, Esq.; CELA, OSBA Certified Specialist; Solomon, Steiner & Peck, Ltd.; Mayfield Heights

Shawn Britt, CLU, CLTC; Director, Long-Term Care Initiatives, Advanced Consulting Group, Nationwide Insurance; Columbus

2:45 Break

3:00 Views on Medicaid Estate Recovery

Medicaid Estate Recovery is sometimes viewed by elder law practitioners as an adversarial program, but it is possible for the Ohio Attorney General's Office and elder law attorneys to have meaningful discussions surrounding recovery. Find out how each side of the equation views Medicaid Estate Recovery collection, negotiation and planning in this panel discussion between two seasoned practitioners.

Moderator: Jessica N. Roshon, Esq.; Taps Sutton & Roshon, LLC; Columbus

Robert J. Byrne, Esq.; Principal Assistant Attorney General, Office of Ohio Attorney General Dave Yost; Columbus

Richard T. Taps, Esq.; Taps Sutton & Roshon, LLC; Columbus

4:00 Institute Concludes

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Did you know the Ohio Supreme Court Commission on CLE, Gov. Bar Rule X, now offers a new CLE credit? You can earn up to 24 credit hours for approved live webinar self-study activities during a biennial compliance period. This seminar will be offered as a live webcast and will qualify for the new live interactive webinar credit. Questions? Please contact OSBA Member Services at (800) 232-7124.

HOW TO REGISTER

Online:

Register for In-Person Attendance: OhioBar.org/CLE22-005

Register for Day 1: OhioBar.org/CLE22-005LIW

Register for Day 2: OhioBar.org/CLE22-005LIW-day2

Phone: (800) 232-7124 | (614) 487-8585

Mail:

Ohio State Bar Association
P.O. Box 16562 Columbus, OH 43216-6562

Temporary Cancellation Policy: While we love to see you at our events, at this time, the health and safety of our legal community is paramount. If you are registered for a program and find you are not feeling well, please call the OSBA Member Service Center at (800) 232-7124. A customer service representative will be happy to work with you to suggest other options or to provide a full refund, if necessary.



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