



5200 S.W. Meadows Rd.
P.O. Box 1689
Lake Oswego, OR 97035-0889

Effective Elder Law

As Oregon's population of older adults grows, more people are looking to lawyers to help them understand the legal challenges of planning for and responding to issues related to aging and disability.

Gain practical insights on:

- ◆ Ways to structure ownership of assets
- ◆ Social Security benefits based on disability
- ◆ Changes in Medicaid assistance for long-term care
- ◆ Estate and disability planning for same-sex couples after HB 2007



Effective Elder Law

Cosponsored by the Elder Law Section

Friday, October 5, 2007

8:30 a.m.–4:30 p.m.

Oregon Convention Center
Portland, Oregon

4.5 General CLE credits, 1 Ethics credit,
and 1 Elimination of Bias credit



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777 N.E. Martin Luther King Jr. Blvd.
Portland, Oregon

THIS SEMINAR IS PACKED WITH information for elder law attorneys and general practitioners who want to respond to the situations being faced by increasing numbers of clients. A panel of elder law experts will guide you through recent changes in the Oregon Medicaid rules that affect transfers, annuities, and spousal support orders. Identify ownership and income tax issues that are often overlooked by older clients and clients with disabilities. Explore how House Bill 2007 and Senate Bill 2 are changing estate and disability planning for lesbian and gay couples. Learn which factors are critical for determining eligibility for different types of Social Security disability benefits. A practice-based ethics presentation will help you analyze confidentiality and attorney-client privilege issues involving the living and the dead.

Elder Law Section members receive a \$20 registration discount!

Register by using this form or calling the OSB CLE Service Desk at (503) 684-7413, or toll-free in Oregon at 1-800-452-8260, ext. 413.

7:30 Registration

8:30 Advising Clients in the Current Medicaid Environment

- ◆ Recent changes to the Oregon Administrative Rules on financial eligibility
- ◆ Medicaid long-term care service priority levels
- ◆ Options for the community spouse

Michael Edgel, *Fitzwater & Meyer LLP, Clackamas*

Tim McNeil, *Davis Pagnano & McNeil LLP, Portland*

S. Jane Patterson, *Attorney at Law, Gresham*

10:00 Break

10:15 Property Rights and Wrongs

- ◆ Ownership options
- ◆ Common probate avoidance techniques
- ◆ Tax consequences

Brian Haggerty, *Minor Bandonis & Haggerty PC, Newport*

11:15 It's Not EZ: Tax Issues for Elders and People with Disabilities

- ◆ Identifying the issues
- ◆ Common income tax situations and decisions

Katherine M. Zelko, *Attorney at Law, Portland*

11:45 Lunch

12:45 Elder Law Section Annual Meeting

1:15 Practical Ethics: Life and Death Issues

- ◆ Confidentiality and attorney-client issues before and after death
- ◆ Standards for waiver and consent
- ◆ Multiple generation representation

Chris Mullmann, *Oregon State Bar, Lake Oswego*

2:15 Social Security Benefits Based upon Disability

- ◆ Overview and comparison of eligibility requirements
- ◆ Benefits available through SSDI, SSI, DAC, and disabled widow(er) programs

Jeffrey C. Mapes, Attorney at Law, Scappoose
Laurie Bennett Mapes, Attorney at Law, Scappoose

3:15 Break

3:30 Love and . . . ?

- ◆ Changes in estate and disability planning for same-sex couples
- ◆ House Bill 2007
- ◆ Senate Bill 2

Penny L. Davis, Davis Pagnano & McNeil LLP, Portland
Mark M. Williams, Hutchinson Cox Coons DuPriest Orr & Sherlock PC, Eugene

4:30 Adjourn

Section Planners:

- ◆ **Mark M. Williams**, CLE Chair, Hutchinson Cox Coons DuPriest Orr & Sherlock PC, Eugene
- ◆ **Dady K. Blake**, Attorney at Law, Portland
- ◆ **Penny L. Davis**, Davis Pagnano & McNeil LLP, Portland
- ◆ **Brian Haggerty**, Minor Bandonis & Haggerty PC, Newport
- ◆ **Steven A. Heinrich**, Attorney at Law, Corvallis
- ◆ **S. Jane Patterson**, Attorney at Law, Gresham
- ◆ **Brian M. Thompson**, Law Office of Brian M. Thompson, Eugene

OSB CLE Seminars Attorney:

- ◆ **Karen D. Lee**, klee@osbar.org, (503) 431-6382

Video Replays

This seminar will be videotaped and shown in its entirety at the following locations if three or more registrations are received at least a week prior to the replay date. To find out if a replay will be shown, please visit the Seminars link at www.osbcle.org and click "View" on the date of the scheduled video replay. Or you may call the CLE Video Replay Hotline at 1-800-452-8260, ext. 502. The Hotline is updated each Tuesday for that week's video replay schedule.

- ◆ **Astoria—Friday, November 9**
Lavis DiBartolomeo PC
1139 Exchange St.
- ◆ **Coos Bay—Friday, November 2**
Daniel M. Hinrichs PC
590 Commercial Ave.
- ◆ **Eugene—Friday, November 9**
Gaydos Churnside & Balthrop PC
440 E. Broadway, Suite 300
- ◆ **Grants Pass—Thursday, November 1**
Josephine County Courthouse, Room 222
N.W. 6th and "C" Streets
- ◆ **Hood River—Friday, November 2**
Wyers Haskell Davies PC
216 Columbia
- ◆ **Klamath Falls—Friday, November 2**
Boivin Uerlings & DiIaconi PC
803 Main St., Suite 201
- ◆ **LaGrande—Friday, November 2**
Mautz Baum & O'Hanlon LLP
1902 Fourth St.
- ◆ **Lake Oswego—Wednesday, November 7**
Oregon State Bar Center
5200 S.W. Meadows Road
- ◆ **Medford—Friday, November 9**
Frohnmayr Deatherage
2592 E. Barnett Road
- ◆ **Newport—Friday, November 9**
Macpherson Gintner & Diaz
423 North Coast Highway
- ◆ **Pendleton—Friday, November 9**
Mautz Baum & O'Hanlon LLP
101 S.E. Byers Ave.
- ◆ **Redmond—Friday, November 9**
Bryant Emerson & Fitch
888 W. Evergreen
- ◆ **Roseburg—Thursday, November 1**
Douglas County Counsel's Office
Law Library, Room 319
1036 S.E. Douglas
- ◆ **Salem—Friday, November 2**
The Vandermay Law Firm
Capitol Center Building
388 State St., Suite 340
- ◆ **Vale—Friday, November 2**
Butler & Looney PC
292 Main St. S.

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Friday, October 5, 2007

Name _____ Bar # _____
 Firm Name _____
 Phone _____ Fax _____ E-mail _____
 Address _____
 City _____ State _____ Zip Code _____

SEMINAR REGISTRATION

PORTLAND

\$165 OSB Member—Early registration (received before noon, Monday, 10/1/07)..... \$ _____
 \$185 OSB Member—Regular registration (received after noon, Monday, 10/1/07)..... \$ _____
 \$195 Non-OSB Member..... \$ _____
Elder Law Section member discount—subtract \$20: - _____
 \$0 **2007–2008 Season Ticket** (Please register by noon, Monday, 10/1/07, to guarantee a seat and course materials. Season Ticket registrations received after this time are welcome and will be accommodated on a space-available basis.) \$ _____
 \$0 50-year OSB members may attend free of charge..... \$ _____
 \$0 Oregon judges and their lawyer staff (see below) \$ _____
 Registrant is a judge
 Registrant is a lawyer staff member for the following judge

 Judge (please print)

 Signature of Judge (required)

\$25 Lunch Vegetarian..... \$ _____
 TOTAL REGISTRATION FEES (ELD07) (757) \$ _____
 WB

VIDEO REPLAY (Please see video replay schedule on previous page.)

Location: _____
 \$165 Registration \$ _____
 \$145 Elder Law Section member \$ _____
 \$0 2007–2008 Season Ticket \$ _____
 \$0 50-year OSB members may attend free of charge..... \$ _____
 \$0 Oregon judges and their lawyer staff (see below) \$ _____
 Registrant is a judge
 Registrant is a lawyer staff member for the following judge

 Judge (please print)

 Signature of Judge (required)

TOTAL REGISTRATION FEES (ELD07) (757) \$ _____
 WB

SEMINAR PRODUCT ORDERS

Seminar products will be available approximately two weeks after the live program.

\$185 Audiocassettes and course materials (ELD07.KAT).. \$ _____
 \$185 Audio CDs and course materials (ELD07.KCD)..... \$ _____
 \$305 Videotapes and course materials (ELD07.KVT)..... \$ _____
 \$305 DVDs and course materials (ELD07.KDV) \$ _____
 Subtotal: \$ _____

2007–2008 Season Ticket No. _____ **discount—**
subtract 10%: - _____

\$55 Course materials (2007–2008 Season Ticket No. _____ **discount—subtract 20%**) (ELD07.HB)..... \$ _____
 Subtotal: \$ _____
 Shipping and handling fee: \$ 7.00
 TOTAL ORDER: \$ _____
 WB

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- Credit Card (VISA or MasterCard only)

All information below required when paying by credit card.

Credit Card Number _____ Expiration Date _____
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THREE WAYS TO REGISTER OR ORDER

- Registrations and orders will not be processed without payment.
1. **PHONE:** 503-684-7413, or toll-free in Oregon at 1-800-452-8260, ext. 413
 2. **FAX with VISA or MasterCard number:** 503-968-4456
 3. **MAIL with check:** Oregon State Bar, CLE Registration, PO Box 1689, Lake Oswego, OR 97035

GENERAL INFORMATION

QUESTIONS? Call the CLE Service Desk at 503-684-7413, or toll-free in Oregon at 1-800-452-8260, ext. 413. For information about upcoming seminars, please visit the CLE Calendar at www.osbar.org.

CANCELLATIONS: Cancellation requests must be received at least 48 hours prior to the start of the seminar to qualify for a refund. Requests are accepted via phone, fax, or mail; please see “Three Ways to Register” for contact information. All cancellations are subject to a \$20 cancellation fee.

TUITION ASSISTANCE: Tuition assistance is available on the basis of financial need. Fax a request stating your financial situation to 503-968-4456 no later than one week before the seminar.

DIETARY RESTRICTIONS OR SPECIAL ACCOMMODATIONS: Call 503-431-6351, or toll-free in Oregon, 1-800-452-8260, ext. 351.

VIDEO OR DVD RENTALS: Call 503-431-6351, or toll-free in Oregon, 1-800-452-8260, ext. 351.