

Oregon
State
Bar

CLE
Seminars

16037 SW Upper Boones Ferry Road
P.O. Box 231935
Tigard, OR 97281-1935

Elder Law 2008: Advancing the Plan

Highlights include:

- ◆ Special needs trust administration
- ◆ Problem areas in guardianship and conservatorship administration
- ◆ Medicaid update
- ◆ Communicating with impaired clients and beneficiaries

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Seminars

*Powering Your
Professional
Development*

Elder Law 2008: Advancing the Plan

Cosponsored by the Elder Law Section

Friday, October 3, 2008
9 a.m.–4:15 p.m.

Oregon Convention Center
Portland, Oregon

4.5 General CLE credits and 1 Access to Justice credit

Click here to
register online



Elder Law 2008: Advancing the Plan

*Cosponsored by the
Elder Law Section*

Friday, October 3, 2008

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

THIS SEMINAR BRINGS VALUABLE INFORMATION on a variety of topics vital to an elder law practice. Expert elder law practitioners will discuss special needs trust administration, provide an update on Medicaid eligibility and estate recovery issues, identify elder law and Medicaid concerns for trusts, and examine problem areas in guardianship and conservatorship administration. An experienced tax lawyer will explain a number of aspects of IRA distributions, including estates and trusts as beneficiaries. Part of any practice is effective communication. Individuals who are impaired present a unique challenge, and a panel will look at how to make information available to impaired clients and beneficiaries, facilitate decision-making, and set appropriate boundaries.

Remember—Elder Law Section members receive a \$20 discount off registration rates! Also, the section's annual business meeting will take place following the lunch break.

Register by using this form or calling the OSB CLE Service Center at (503) 431-6413, or toll-free in Oregon at 1-800-452-8260, ext. 413. For a full listing of OSB CLE seminars, please visit www.osbarcle.org.

8:00 Registration

8:45 Welcome

Ryan E. Gibb, *Section Chair, Douglas Conroyd & Gibb, Salem*

9:00 Special Needs Trust Administration

- ◆ Differences between testamentary and “payback” special needs trusts
- ◆ Distribution standards
- ◆ In-kind income issues

Cinda M. Conroyd, *Douglas, Conroyd & Gibb, Salem*

10:00 Medicaid Update

- ◆ New rules concerning annuities and estate recovery
- ◆ Oregon's long-term care insurance partnership program
- ◆ Deficit Reduction Act of 2005 implementation issues

Geoff Bernhardt, *Law Offices of Geoff Bernhardt, Portland*

10:45 Break

11:00 Communicating Effectively with Impaired Clients and Beneficiaries

- ◆ Making information accessible
- ◆ Facilitating decisions
- ◆ Setting boundaries

Heather O. Gilmore, *Heather O. Gilmore PC, Salem*

Joel Greenberg, *Oregon Advocacy Center, Portland*

Margaret Tiffany, *Professional Fiduciary, Tiffany and O'Shea LLC, Portland*

Noon Lunch (Lunch may be purchased using the registration form)

1:00 Elder Law Section Annual Business Meeting

1:15 Break

1:30 Repairing that Achy Breaky Trust

- ◆ General trust administration
- ◆ Elder law and Medicaid concerns
- ◆ Tax issues

Jonathan A. Levy, *Cavanaugh Levy Bilyeu LLP, Portland*

2:15 IRA Distributions

- ◆ Estates and trusts as beneficiaries
- ◆ Rollovers
- ◆ Disclaimer, division, and distribution

Mark L. Huglin, *Draneas & Huglin PC, Lake Oswego*

3:00 Break

3:15 Problem Areas in Guardianship and Conservatorship Administration

- ◆ Multiple fiduciaries
- ◆ Joint assets and trust assets
- ◆ Issues involving the estate plan

Dady K. Blake, *Attorney at Law, Portland*
Jason C. Broesder, *Arant & Broesder LLC, Medford*
Timothy Marble, *Marble Law Office PC, Forest Grove*

4:15 Adjourn

Section Planners:

- ◆ **Penny L. Davis**, *Davis Pagnano McNeil & Vigna 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*
- ◆ **Mark M. Williams**, *Gaydos Churnside & Balthrop PC, Eugene*
- ◆ **Whitney D. Yazzolino**, *Charles S. Gauger PC, Portland*

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 click on the Seminars Calendar at www.osbarcle.org and select the date of the scheduled video replay.

- ◆ **Astoria—Friday, October 31**
Di Bartolomeo Law Office
1139 Exchange St.
- ◆ **Bend—Friday, October 24**
Miller Nash LLP
1567 S.W. Chandler Ave., Suite 204
- ◆ **Coos Bay—Friday, October 24**
Daniel M. Hinrichs PC
590 Commercial Ave.
- ◆ **Eugene—Friday, October 31**
Gaydos Churnside & Balthrop PC
440 E. Broadway, Suite 300
- ◆ **Grants Pass—Thursday, October 23**
Josephine County Courthouse, Room 222
N.W. 6th and “C” Streets
- ◆ **Hood River—Friday, October 24**
Wyers Haskell Davies PC
216 Columbia
- ◆ **Klamath Falls—Friday, October 24**
Boivin Uerlings & DiLaconi PC
803 Main St., Suite 201
- ◆ **LaGrande—Friday, October 24**
Mautz Baum & O’Hanlon LLP
1902 Fourth St.
- ◆ **Medford—Friday, October 31**
Frohnmayr Deatherage
2592 E. Barnett Road
- ◆ **Newport—Friday, October 31**
Macpherson Gintner & Diaz
423 North Coast Highway
- ◆ **Pendleton—Friday, October 31**
Mautz Baum & O’Hanlon LLP
101 S.E. Byers Ave.
- ◆ **Redmond—Friday, October 31**
Bryant Emerson & Fitch
888 W. Evergreen
- ◆ **Roseburg—Thursday, October 23**
Douglas County Counsel’s Office
Law Library, Room 319
1036 S.E. Douglas
- ◆ **Salem—Friday, October 24**
The Vandermay Law Firm
Capitol Center Building
388 State St., Suite 340
- ◆ **Tigard—Wednesday, October 29**
Oregon State Bar Center
16037 S.W. Upper Boones Ferry Rd.
- ◆ **Vale—Friday, October 24**
Butler & Looney PC
292 Main St. S.

Elder Law 2008: Advancing the Plan

Friday, October 3, 2008

Bar # _____ Name _____

Firm Name _____

Email _____ Phone _____ Fax _____

Address _____

City _____ State _____ Zip Code _____

SEMINAR REGISTRATION

PORTLAND

\$175 OSB Member—Early registration (received before noon, Monday, 9/29/08)..... \$ _____

\$195 OSB Member—Regular registration (received after noon, Monday, 9/29/08)..... \$ _____

\$205 Non-OSB Member..... \$ _____

Elder Law Section member discount—subtract \$20: —_____

\$0 **2008–2009 Season Ticket** (Please register by noon, Monday, 9/29/08, 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 (ELD08) (757) \$ _____

B

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

Location: _____

\$175 Registration \$ _____

\$155 Elder Law Section member \$ _____

\$0 2008–2009 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 (ELD08) (757) \$ _____

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SEMINAR PRODUCT ORDERS

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

\$195 Audiocassettes and course materials (ELD08.KAT) ... \$ _____

\$195 Audio CDs and course materials (ELD08.KCD) \$ _____

\$315 Videotapes and course materials (ELD08.KVT)..... \$ _____

\$315 DVDs and course materials (ELD08.KDV) \$ _____

Subtotal: \$ _____

2008–2009 Season Ticket No. _____ discount—
subtract 10%: —_____

Subtotal: \$ _____

Shipping and handling fee: \$ 7.00

TOTAL ORDER: \$ _____

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VHS OR DVD RENTALS

For additional viewers, please call 503-431-6351, or toll-free in Oregon at 1-800-452-8260, ext. 351.

\$195 VHS rental and course materials (ELD08.KVR) \$ _____

\$195 DVD rental and course materials (ELD08.KDR) \$ _____

Subtotal: \$ _____

2008–2009 Season Ticket No. _____ discount—
subtract 30%: —_____

Subtotal: \$ _____

Shipping and handling fee: \$ 7.00

TOTAL ORDER: \$ _____

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PAYMENT OPTIONS

- Check Enclosed: Payable to Oregon State Bar
- Credit Card (VISA or MasterCard only)

All information below required when paying by credit card.

Credit Card Number _____ Expiration Date _____

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Credit Card Billing Address _____

City _____ State _____ Zip Code _____

Authorized Signature _____

FOUR WAYS TO REGISTER OR ORDER

Registrations and orders will not be processed without payment.

- ONLINE** at www.osbarcle.org.
- PHONE:** 503-431-6413, or toll-free in Oregon at 1-800-452-8260, ext. 413
- FAX with VISA or MasterCard number:** 503-968-4456
- MAIL with check:** Oregon State Bar, CLE Registration, P.O. Box 231935, Tigard, OR 97281-1935

GENERAL INFORMATION

QUESTIONS? Call the CLE Service Center at 503-431-6413, or toll-free in Oregon at 1-800-452-8260, ext. 413. For information about upcoming seminars, please visit the CLE Calendar at www.osbarcle.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.