

SPECIAL NEEDS LAW BOOT CAMP

Designed for newer special needs law attorneys, this program provides a thorough overview and is chock-full of practice tips and sample forms! Client communication, drafting special needs trusts, maximizing government benefits, utilizing waiver programs, powers of attorney, guardianships, and MORE will be discussed. Also get an overview of what you need to know about Special Ed, Criminal and Family Law issues that affect your clients.

 February 12, 2019

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SPECIAL NEEDS LAW BOOT CAMP

February 12, 2019

Chicago | Springfield Simulcast
Live Webcast Via IICLE® e-learn

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*Sample
Forms &
Checklists
Provided*

Program Highlights:

- *POAs v. Guardianships*
- *Special Needs Trusts*
- *Government Benefits*
- *Waiver Programs*



Moderator:



Brian Rubin
Rubin Law, A Professional Corporation
Buffalo Grove/Chicago/Old Orchard

8:35 Welcoming Announcements

8:45 – 9:45
Introduction to the Topic: Basic Overview of Special Needs Planning and Best Practices for Connecting with Special Needs Clients

PR 0.5 Credits

What is special needs planning? What are the different types of SNTs and when should you use each? Learn about topics such as spenddown and the ABLE Act that we won't have time to cover more in-depth. Also, learn about the unique challenges of representing special needs clients and their families, including implicit biases you might be unaware of and appropriate language you should employ.

Brian Rubin, Rubin Law, A Professional Corporation, Buffalo Grove/Chicago/Old Orchard, Program Moderator

9:45 – 10:00 Networking Break with Sponsors

10:00 – 11:30
Intro to Government Benefits and Waiver Programs

Learn about the basics of SSI, SSDI, Medicare, Medicaid, and waiver programs, and how to best protect your clients' benefits, during this interactive session. What questions do you need to ask at intake to determine who can qualify for benefits? Who qualifies and what is the application process like for medical/physical disabilities? Intellectual/developmental disabilities? Mental illness? What happens if SSI/SSDI applications are denied? How do you apply for AABD (traditional Medicaid)? ACA (Obama Care Medicaid)? HBWD (Medicaid Buy In)?

Sherri Schneider, Family Benefit Solutions, Inc., Buffalo Grove

11:30 – 12:15

Basic Third Person Special Needs Trusts Drafting

Learn everything you need to know about drafting third party special needs trusts (those which are funded with "other people's" money, not the money of the beneficiary who has disabilities). How are these trusts are created? How is money transferred during the life of the donor or at the donor's death? How do transfers impact the donor? **SAMPLE FORMS PROVIDED.**

Leonard F. Berg, Attorney at Law, East Alton

12:15 – 1:00 Networking Lunch Provided

1:00 – 1:45

Basic First Person Special Needs Trusts Drafting

When should you use a (d)(4)(A) first party special needs trust versus using a third party SNT or a pooled first party SNT or an ABLE Account? Understand the elements that must be included in a (d)(4)(A) first party trust, and learn best practices for the drafting process. **SAMPLE FORMS PROVIDED.**

Benjamin Rubin, Rubin Law, A Professional Corporation, Buffalo Grove/Chicago/Old Orchard

1:45 – 2:15

Nuts & Bolts of Substitute Decision-Making: Powers of Attorney and Guardianships

Under what circumstances is a guardianship advisable? Can a power of attorney be used as an alternative and, if so, under what circumstances? If a guardianship is advisable, is a full (plenary) guardianship necessary, or will a limited guardianship suffice?

Melanie Hoffman, Rubin Law, A Professional Corporation, Buffalo Grove/Chicago/Old Orchard
Timothy J. Rigby, Hart, Southworth & Witsman, Springfield

2:15 – 2:45

What the Special Needs Law Attorney Needs to Know about Special Education Law

What are IEPs and when are they available? Learn how to help your clients navigate the educational system.

Matt Cohen, Matt Cohen & Associates, LLC, Chicago

2:45 – 3:00 Networking Break with Sponsors

3:00 – 3:30

What the Special Needs Law Attorney Needs to Know about Criminal Law

Help your special needs clients when they come into contact with law enforcement.

Jenni Hansen, Hansen & Cleary, LLC, Northbrook

3:30 – 4:00

What the Special Needs Law Attorney Needs to Know about Family Law **PR 0.5 Credits**

Understand the ethical issues of representing special needs clients when divorce impacts the family. What other family law issues are specific to special needs families?

Marc K. Schwartz, Schwartz Wolf & Bernstein LLP, Buffalo Grove

4:00 – 4:30

Ethical Dilemmas Facing the Special Needs Law Attorney (and an interactive Q&A panel)

PR 0.5 Credits

Faculty Panel

4:30

Adjourn

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