

Agenda

Medicare: Addressing Clients' Basic Questions Medicare basics Long-term care options Part B enrollment Medicare advantage Medicare Part D	<i>A. Gray</i>
Handling Elder Abuse Claims	<i>J. Pieper</i>
Handling Ethical Issues in Representation of the Elderly Identifying the client Preventing conflicts of interest Determining client capacity Maintaining client confidentiality	<i>J. Pieper</i>
Preventing and Recognizing Elder Abuse/Neglect Financial exploitation Caregiver neglect/abuse Nursing home neglect/abuse/negligence Nursing home duties and liability	<i>M. Moreno</i>
Asset Protection Planning for the Elderly and Disabled Persons	<i>J. Story</i>
Asset Protection Case Studies Special needs situations Single people Married people Death of the first spouse opportunities IRA planning options	<i>M. Fogarty</i>



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Illinois Elder Law and Planning Update

Live, Interactive Webinar - Thursday, September 5, 2024

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Learning Objectives

- You'll be able to:**
- Answer** basic client questions about Medicare Parts A, B, C and D.
 - Prevent** and recognize nursing home neglect and caregiver abuse and neglect.
 - Handle** elder abuse claims.
 - Handle** ethical issues in elder law, including determining client capacity.
 - Assist** with asset protection planning and review case studies.

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Illinois Elder Law and Planning Update

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| Address clients' basic Medicare questions | Recognize ethical issues in representation of the elderly |
| Work to prevent financial exploitation and caregiver neglect | Assist with asset protection planning for elderly clients |
| Handle claims of elder abuse | |

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Webinar Information

Online - Thursday, September 5, 2024

Log into Webinar 8:00 - 8:30 am CDT	Break 12:00 - 12:30 pm CDT
Morning Session 8:30 am - 12:00 pm CDT	Afternoon Session 12:30 - 4:30 pm CDT

Tuition
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Faculty

Alan I. Gray is president of Alan Gray Financial Services (AGFS). After going on Medicare a few years ago he decided that if he could get the proper training and certification, he would like to help other people with the process of getting Medicare Supplements and plans. Mr. Gray specializes in helping both people going on Medicare for the first time as well as people who are already on Medicare navigate the Medicare maze and pick the best and most cost effective plan for their individual needs. The process is complicated but he helps make it simple and easy to understand. Besides meeting with clients, Mr. Gray holds informational Medicare 101 meetings in the local area at various venues, including medical centers, libraries and community centers. He received a bachelor of science degree from Southern Illinois University. Mr. Gray is a Registered Certified Public Accountant and is also a licensed insurance agent. He has over 40 years' experience working with investment management organizations and financial distribution companies in leadership roles.

Joseph W. Pieper ("Joe") has been practicing law for over 30 years, focusing his area of expertise in probate, involving the administration and litigation of adult disabled estates, decedent's estates, and minor's estates. He is regularly appointed as a guardian-ad-litem, attorney for respondents in adult guardianship cases, and as a special administrator in the Probate Division of the Circuit Court of Cook County. Mr. Pieper also provides estate planning for his clients, including drafting wills, trusts and powers of attorney. In addition to probate matters, he also serves clients seeking residential real estate assistance. Mr. Pieper has spoken on various topics, including assisting attorneys in the Chicago Volunteer Legal Services Foundation (CVLS) training program for guardians ad litem, and the guardian ad litem's role in domestic violence situations. Mr. Pieper has been a member with CVLS for over 20 years. In 2002 he received the Distinguished Service Award from the CVLS in recognition of the pro bono work that he has done for the organization. In 2017, Mr. Pieper received the Pro Bono Alumni Award from DePaul University College of Law. He was also one of the attorneys featured in the September 2011 issue of *Chicago Lawyer* in the magazine's issue on pro bono work. Prior to becoming an attorney, Mr. Pieper worked for Merrill Lynch Futures in its Commodity Operations Division at the Chicago Board of Trade for 16 years. Mr. Pieper filled various management roles at Merrill Lynch. While working at Merrill Lynch, Mr. Pieper attended Northwestern University where he received a bachelor of arts degree in Economics graduating with honors as a Phi Beta Kappa. He then went on to DePaul University College of Law, where he earned his juris doctor, and graduated with honors in the top ten percent of his class. He continues to advocate for his clients with personalized and professional attention to all matters.

Mallory Moreno is a CELA (Certified Elder Law Attorney), an exclusive honor bestowed on a select group of attorneys by the National Elder Law Foundation. There are only 17 CELAs in Illinois providing creative solutions for clients who are faced with elder law issues. From complete estate and long-term care planning to addressing urgent and often expensive healthcare situations, she devotes her practice to advocating and helping individuals and families maximize the independence and quality of life of seniors and people with disabilities. Ms. Moreno's practice focuses in estate planning, adult guardianships, estate and trust administration and litigation, including financial exploitation, will and trust contests, fiduciary disputes, issues of capacity, powers of attorney, undue influence, citations and fraud. She also handles long-term care planning, Medicaid, Medicaid appeals, special needs planning and disability law. Ms. Moreno is on the Board of Directors and is the immediate past president of the Illinois Chapter of the National Academy of Elder Law Attorneys (IL NAELA), an organization closely involved in advancing legislation on behalf of elder law attorneys and their clients.

Jeffrey P. Story is a seasoned estate planner for a range of clients, and he is a special needs attorney. He knows how to help elders using specific trusts for asset protection and receiving family support, where desired. Helping elders remain at home or age in place with family members is part of his goal for helping elders, in addition to offering estate planning documents to facilitate their care at home and prepare advanced planning documents. Special needs beneficiaries may well need to live in a community of their peers to have a more fulfilling life than living with a skilled caregiver. While it is not perfect, planning to live abroad well before long-term care is necessary is a way to obtain quality healthcare and live in a culture that values older people culturally. Mr. Story has a son, Gabriel, whom he enjoys spending time with. They like to bicycle in the beautiful forest preserve trails in Illinois and enjoy the cultural and natural joys this Great Lakes region has to offer.

Martin Fogarty is an estate planning and elder law attorney and founder of The Heartland Law Firm. Driven by a passion for solving problems and a deep sense of compassion, Mr. Fogarty has a commitment to help families navigate life's challenges. The Heartland Law Firm helps families through life's transitions, protecting and restoring order and well-being to clients. Throughout his career, Mr. Fogarty has guided countless clients through the complexities of estate planning, ensuring their legacies are protected and their wishes honored. His expertise extends to wills, trusts, powers of attorney, and elder law, with a particular focus on safeguarding client well-being through major life events.

Credit Information

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