

Agenda

Preventing and Recognizing Elder Abuse/Neglect Financial exploitation Caregiver neglect/abuse Nursing home neglect/abuse/negligence Nursing home duties and liability	<i>D. Schuster</i>
Current Options for Paying for Long-Term Care Private pay sources for long-term care • Long term care (LTC) insurance • LTC annuity (deferred and hybrid) Missouri Medicaid for long term care • Qualification and benefits • The application process • Special circumstances	<i>D. Kincaid</i>
Handling Ethical Issues in Representation of the Elderly Identifying the client Preventing conflicts of interest Determining client capacity Maintaining client confidentiality	<i>P.Glen Smith</i>
Financial POAs and Medical Decision-Making Choosing the right proxies Adult guardianships Medical POAs and advance directives	<i>L. Nolan</i>
Financial Planning for the Elderly and Disabled Asset protection: estate planning considerations Exempt or excluded assets Using trusts and advanced planning techniques New legislative changes and potential problems	<i>R. Fortenberry</i>
Navigating Complex Assets Special Needs Trusts (SLATs) Spousal Lifetime Access Trusts (SNTs) Farms	<i>K. Overton</i>

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Missouri Elder Law and Estate Planning Update

Live, Interactive Webinar - Monday, August 12, 2024

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Altoona, WI 54720-0278



Learning Objectives

You'll be able to:

- Discuss** private pay options for long-term care, and explore Missouri Medicaid eligibility and benefits.
- Protect** clients from financial exploitation and caregiver neglect/abuse.
- Handle** ethical issues in representation of the elderly.
- Use** financial powers-of-attorney and advance medical directives.
- Do** advanced financial planning, including asset protection planning.
- Consider** using SLATs, SNTs, and review options for passing down family farms.



HalfMoon Education Inc.,
Your LIVE Education Leader Presents

Missouri Elder Law and Estate Planning Update

Live, Interactive Webinar - Monday, August 12, 2024



- Explore** private pay and Missouri Medicaid options for paying for long term care
- Discuss** financial POAs and medical decision-making
- Prevent** and recognize elder abuse and neglect
- Examine** asset protection, special needs trusts and advanced planning techniques
- Handle** ethical issues in representation of the elderly

Continuing Education Credits

- Accountants**
7.2 CPE Credits
- Attorneys**
7.2 CLE Credits (Incl. 1.2 Ethics Credits)



Webinar Information

Online - Monday, August 12, 2024	
Log into Webinar	Break
8:00 - 8:30 am CDT	11:45 am - 12:15 pm CDT
Morning Session	Afternoon Session
8:30 - 11:45 am CDT	12:15 - 3:30 pm CDT

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Faculty

Debra Schuster *Paule, Camazine & Blumenthal, P.C.*
Ms. Schuster is an attorney with Paule, Camazine & Blumenthal, PC. She has practiced elder and disability law since 1999, having practiced health law since 1991. Ms. Schuster's practice focuses on elder law issues, a growing area of law with few experienced practitioners. She works with and advises social workers, geriatric and care managers, financial planners and accountants, psychiatrists and geriatric physicians about incapacity issues and financial exploitation. Ms. Schuster's practice focuses on multi-disciplinary collaboration with these professionals to address the complex, myriad age and disability issues her clients face.

Danielle R. Kincaid *Attorney at Law, The Elder Law Group, LLC*
Ms. Kincaid is a partner with The Elder Law Group. She has earned a number accolades in the area of estate planning and elder law including being named by the *Springfield Business Journal* as a Trusted Adviser and being selected as one of five attorneys in the nation by the American Bar Association for a two year Trust & Estate Fellowship. Ms. Kincaid currently serves as the American Bar Association Long Term Care Committee vice chair and recently published an article in the national *Probate & Property* magazine on recent changes to Missouri's guardianship statutes. She is a member of the Greene County Estate Planning Council, the National Academy of Elder Law Attorneys, the Community Foundation of the Ozarks Professional Advisors Council, the Southern Missouri Women Lawyers, the Springfield Metropolitan Bar Association, and The Missouri Bar Association.

P. Glen Smith *J.D., M.Div.*
Mr. Smith is the founder and lawyer at Lifescape Law & Development. After a successful career in the corporate realm, he decided to begin his own practice centered on serving people. He specializes in elder law, estate planning, special needs planning, mediation, and long-term care planning. Mr. Smith genuinely enjoys people and it shows – he listens to each person's story and situation to help them develop a plan which best fits their family's circumstances, financial position and life's values. As a husband, father to five, and grandfather to a growing number, he understands the confusion that can sometimes occur in certain seasons of life. He believes each person is a masterpiece created to thrive in this life.

Lloyd M. Nolan
Mr. Nolan is a solo practitioner in Missouri. He established his law firm in 1991 and his areas of practice include wills, probate and estate planning, workers compensation, personal injury and DWI & alcohol related offenses. The firm serves the entire Metropolitan St. Louis area (including St. Louis County, St. Louis City, St. Charles County, Jefferson County, Franklin County and Madison and St. Clair Counties in Illinois). Mr. Nolan earned his B.S and J.D. degrees from Southern Illinois University.

Rachel Fortenberry *Fortified Elder Law*
Ms. Fortenberry is the founder of Fortified Elder Law. As one of the area's only crisis Medicaid planning attorneys, Ms. Fortenberry saw a need for a firm focused on asset protection, estate planning, and Medicaid eligibility. She founded Fortified Elder Law with expert strategies, know-how, and the experience of helping families become Medicaid eligible. Becoming an elder law attorney has allowed her to find her life's work: helping clients preserve their life savings. Ms. Fortenberry's greatest joy as an attorney has been to help keep a spouse from losing everything just because they can no longer keep their loved one at home.

Kathleen Overton *Paths Law Firm*
Ms. Overton is an attorney and owner at Paths Law Firm. She has more than 17 years of experience advocating for those with special needs and navigating the state and federal agencies formed to help the disabled and elderly. At Paths Law Firm, Ms. Overton's practice focuses on helping the elderly qualify for nursing home Medicaid, creating estate plans to protect beneficiaries, as well as a lot of time planning and forming businesses. She also enjoys helping clients form non-profit organizations and obtain 501(c)(3) tax-exempt status. After attending law school at the University of Oklahoma, Ms. Overton began representing clients before the Social Security Administration. Eventually, her practice switched to federal court appeals and she spent years representing clients before the Eastern and Western District of Missouri, the District of Kansas, and the Eighth Circuit Court of Appeals.

For more information on the presenters
Please visit **www.halfmoonseminars.org** or scan the QR code

Credit Information

This webinar is open to the public and is designed to qualify for up to 7.2 CPE credits for accountants and 7.2 CLE credits for attorneys in Missouri. Professionals seeking continuing education credits in other states may be able to claim the hours earned at this webinar; please refer to specific board rules to determine eligibility.

This webinar offers accountants 7.2 CPE credit hours (based on 50-minute hours) of intermediate-level group internet-based CPE credits in the area of Specialized Knowledge. Knowledge of estate planning is beneficial, and no advance preparation is recommended. NASBA Sponsor No. 103015.

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The Missouri Bar MCLE Department has approved this webinar for a total of 7.2 CLE hours, which includes 1.2 ethics CLE hours.

Attendance will be monitored, and attendance certificates will be available after the webinar for those who attend the entire course and score a minimum 80% on the quiz that follows the course (multiple attempts allowed).

On-Demand Credits
The preceding credit information only applies to the live presentation. This course in an on-demand format is not eligible for any of the listed credits.

Additional Learning

Missouri Land and Water Law: Ownership and Access
Online | Friday, August 16, 2024 | 8:30 am - 4:00 pm CDT

Credits: Engineers: 6.5 PDHs | Land Surveyors: 6.5 PDUUs
Attorneys: 7.8 CLE Hours | Certified Planners:CM|6.5