

# Agenda

|  |                      |
|--|----------------------|
| <b>Assessing Alternatives to Residential Long-Term Care</b><br>Oregon programs supporting <ul style="list-style-type: none"><li>• Adult day care</li><li>• Alternative living services</li><li>• Support services</li></ul>  | <i>M. Williamson</i> |
| <b>Current Options for Paying for Long-Term Care</b><br>Private pay sources for long-term care <ul style="list-style-type: none"><li>• Long term care (LTC) insurance</li><li>• LTC annuity (deferred and hybrid)</li></ul> Oregon Health Plan <ul style="list-style-type: none"><li>• Qualification and benefits</li><li>• The application process</li><li>• Attribution process for married applicants</li></ul> | <i>M. Williamson</i> |
| <b>Handling Ethical Issues in Representation of the Elderly</b><br>Identifying the client<br>Preventing conflicts of interest<br>Determining client capacity<br>Maintaining client confidentiality   | <i>M. Moneyhun</i>   |
| <b>Medicare: Addressing Clients' Basic Questions</b><br>Medicare basics<br>Long-term care problem<br>Part B enrollment<br>Medicare Advantage   | <i>T. Berthelot</i>  |
| <b>Financial Planning for the Elderly and Disabled</b><br>Asset protection: estate planning considerations<br>Exempt or excluded assets<br>Using trusts and advanced planning techniques<br>New legislative changes and potential problems   | <i>M. Rose</i>       |
| <b>Reverse Mortgages and Other Related Home Finance Options</b><br>Types of reverse mortgages: features and qualification<br>Using reverse mortgages to purchase a home<br>What happens when the last mortgagor vacates the home?  | <i>J. Foody</i>      |

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## Oregon Elder Law and Planning Update

Live, Interactive Webinar - Thursday, May 30, 2024

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PO Box 278  
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## Learning Objectives

- You'll be able to:**
- Assess** alternatives to residential long-term care, including alternative living services and adult day care.
  - Evaluate** options for paying for long term care, including long-term care insurance, annuities and the Oregon Health Plan.
  - Identify** potential ethical issues in representing the elderly.
  - Get** answers to clients' basic Medicare questions.
  - Explore** asset protection planning, trust planning and the use of reverse mortgages.



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- |  |   |
|--|---|
| <b>Explore</b> options for paying for long-term care                 | <b>Address</b> clients' basic Medicare questions                |
| <b>Evaluate</b> alternatives to residential long term care           | <b>Assist</b> clients with financial planning                   |
| <b>Identify</b> potential ethical issues in representing the elderly | <b>Discuss</b> reverse mortgages and other home finance options |

### Continuing Education Credits

|                                       |   |
|---------------------------------------|---|
| <b>Accountants</b><br>7.2 CPE Credits | <b>Attorneys</b><br>6.0 General CLE Hours |
| <b>NASBA</b><br>7.2 CPE Credits       |   |



# Webinar Information

Online - Thursday, May 30, 2024

|   |   |
|---|---|
| <b>Log into Webinar</b><br>8:00 - 8:30 am PDT | <b>Break</b><br>11:30 am - 12:00 pm PDT         |
| <b>Morning Session</b><br>8:30 - 11:30 am PDT | <b>Afternoon Session</b><br>12:00 - 3:30 pm PDT |

**Tuition**  
**\$339** for individual registration.  
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# Credit Information

This webinar is open to the public and offers accountants 7.2 CPE credits (based on 50-minute hours) of intermediate-level group internet based CPE credits in the area of finance. Knowledge of elder law and issues is beneficial, and no advance preparation is recommended. NASBA Sponsor No. 103015.

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This webinar has been approved by the Oregon State Bar for 6.0 general 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**  
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# Faculty

**Meredith Williamson** *NW Estate Law, LLC*  
Ms. Williamson began NW Estate Law, LLC with a mission of creating a law firm where people feel welcome and heard. She believes people are best served when they are free to laugh, cry, and share their fear, struggle, and joy. She wants her clients to understand their options and feel comfortable to ask questions. With client engagement and comfort in mind, she offers flat rates in long-term care, Medicaid, and estate planning. This way clients do not feel rushed by the clock or feel they cannot take the time to ask questions. Initial contacts are in person, over the phone, or over Zoom based on client's preference and location. Home visits are also made available to people who need them. Ms. Williamson graduated from University of Oregon with a major in Psychology and a minor in Business Administration. She then attended the University of San Diego School of Law – a choice she made due to their Child Advocacy Clinic. Upon returning to Oregon, she was in-house counsel, co-owner, and manager of a family company that focused on connecting older Oregonians with appropriate housing and care services. It is in this position she saw the pitfalls of not having an appropriate and well-crafted estate plan in place and realized there was a need in the community for an attorney with her skills and caring approach.

**Marisa Moneyhun** *Kehoe Moneyhun Law, LLC*  
Ms. Moneyhun is one of the founding partners of Kehoe Moneyhun Law, LLC. Her practice focuses exclusively on estate planning, estate administration, guardianships and conservatorships in Oregon and Washington. Born in Portland and raised in Clackamas, Ms. Moneyhun is an Oregonian through and through. She attained her Bachelor's degree from the University of Oregon in Eugene and her J.D. degree from Willamette University College of Law, in Salem. Ms. Moneyhun began her career as a judicial clerk at the Multnomah County Courthouse clerking for Judge Dale Koch and Judge Karen Immergut. After clerking, she worked at a small firm where she focused her practice on probate administration and guardianships. In 2012, Ms. Moneyhun opened the Law Office of Marisa Moneyhun, LLC, focused exclusively on assisting individuals and families with estate planning, trust and estate administration, and adult protective proceedings. Kehoe Moneyhun Law, LLC, is a combination of the Law Office of Marisa Moneyhun, LLC, and the collaborative and family law firm Kehoe Law (formerly Osher Law).

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**Terry Berthelot** *University of Connecticut*  
Ms. Berthelot is an Assistant Professor In Residence and the Associate Department Head for Undergraduate Studies in the Human Development and Family Sciences Department at the University of Connecticut. Her research and advocacy is primarily about access to healthcare for people who are over 65 and for people with disabilities. She earned her Masters degree in social work from Syracuse University, after which she designed, implemented, and then coordinated a Joint Commission accredited hospice program in the Mississippi delta. Finding herself fascinated by the legal and ethical questions surrounding death and dying, Ms. Berthelot pursued her law degree at the University of Mississippi. After graduating, *cum laude*, Ms. Berthelot joined the Center for Medicare Advocacy, a national not-for-profit law firm. As a senior attorney, Ms. Berthelot oversaw the Center's advocacy efforts. She also provided legal advice and representation to Medicare beneficiaries, wrote articles for national publications, produced educational materials, engaged in educational outreach activities and was a contributing author to the Medicare Handbook. Ms. Berthelot is a former chair of the steering committee for the National Academy of Elder Law Attorneys' Health Care Section and she is the former Connecticut liaison for National Healthcare Decisions Day. She is currently the editor-in-chief for the *NAELA News Journal*.

**Michael Rose** *Rose Elder Law, LLC*  
Mr. Rose is an elder law attorney based in Lake Oswego. His practice is focused on assisting clients through the retirement years with thoughtful estate plans and crisis management. He earned his J.D. degree from Willamette University College of Law and his undergraduate degree from Brigham Young University. Mr. Rose comes from a long line of Oregonians who helped to settle the Mid-Willamette valley. He is a husband and father of five.

**Jeff Foody** *President, Northwest Reverse Mortgage and Reverse Loan Solutions*  
Mr. Foody has been serving the reverse mortgage industry since 2002, a time when it was a relatively obscure concept. Since then, the industry has evolved to where reverse mortgages are widely understood and often used by thousands of homeowners who are 55 and older. Mr. Foody has been called one of the country's foremost experts on reverse mortgages. He has been a speaker at the National Reverse Mortgage Lenders Association and other senior and retirement focused conventions. Mr. Foody has been recognized as Oregon's top producing reverse mortgage broker for several consecutive years. Mr. Foody's experience working with every type of reverse mortgage over the years has granted him the authority of a seasoned professional and enabled him to provide exceptional service through education. As of 2019, he is the proud owner of his own reverse mortgage brokerage, Northwest Reverse Mortgage. His belief in the ages of reverse mortgages is so strong that even his parents are happily enjoying one of their own.