Agenda

Medicare: Addressing Clients' Basic Questions — *K. Schilling*
- Medicare basics
- Long-term care problem
- Part B enrollment
- Medicare Advantage

Current Options for Paying for Long Term Care — *M. Schubert*
- Private pay sources for long term care
  - Personal/retirement savings
  - Continuing care retirement communities
  - Long term care (LTC) insurance
  - LTC annuity
- Government benefits for long term care
  - VA Pension with "Aid and Attendance"
  - Medicaid: the main alternative to private pay options

Handling Ethical Issues in Representation of the Elderly — *A. Mayne*
- Identifying the client
- Preventing conflicts of interest
- Determining client capacity
- Maintaining client confidentiality

Assessing Alternatives to Residential Long Term Care — *A. Mayne*
- IRIS (Include, Respect, I Self-Direct) program
  - Adult day care
  - Alternative living services
  - Support services

Financial Planning for the Elderly and Disabled — *A. Mayne*
- Asset protection: estate planning considerations
- Exempt or excluded assets
- Using trusts and advanced planning techniques
- New legislative changes and potential problems

Reverse Mortgages and Other Related Home Finance Options — *J. Cullen*
- Types of reverse mortgages: features and qualification
- Using reverse mortgages to purchase a home
- What happens when the last mortgagor vacates the home?

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Wisconsin Elder Law and Planning Update
Live, Interactive Webinar - Wednesday, May 29, 2024

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Learning Objectives

You'll be able to:

Address clients' basic questions about Medicare coverage and costs.

Evaluate current options for paying for long term care.

Handle ethical issues in representation of the elderly.

Assess alternatives to residential long-term care.

Explore asset-protection planning and trust planning techniques.

Discuss home finance options including reverse mortgages.

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Wisconsin Elder Law and Planning Update

Live, Interactive Webinar - Wednesday, May 29, 2024

Explore Medicare basics and address clients' questions

Study current options for paying for long term care in Wisconsin

Discuss ethical issues in representation of the elderly

Examine alternatives to residential long term care

Learn about financial planning for the elderly and disabled

Study reverse mortgages and other related home finance options

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Faculty

Kate Schilling
Attorney, Legal Services Manager at Greater Wisconsin Agency on Aging Resources, Inc.
Ms. Schilling oversees the Senior Medicare Patrol, the Wisconsin Guardianship Support Center, and the Elder Benefit Specialist Supervising Attorney program. She works predominantly in the areas of elder law, public benefits, and consumer law. Previously, she was in private practice in New Richmond, Wisconsin, where she practiced in estate planning, Medicaid benefits, guardianship, and general civil litigation. Ms. Schilling is a board member of the State Bar of Wisconsin's Elder & Special Needs Law Section, the Public Interest Law Section, and the National Academy of Elder Law Attorneys. Prior to attending law school, Ms. Schilling coordinated supports for adults with developmental disabilities, and she currently serves as a volunteer guardian for a woman with a disability living in Madison.

Mark D. Schubert
Founder and Principal Attorney at Schubert Law Office, LLC, in Appleton, Wisconsin
After being admitted to the bar in 1991 and holding general practice-oriented positions with several other Wisconsin law firms, Mr. Schubert established Schubert Law Office in 2003, where his principal focus has narrowed to estate planning, estate and trust settlement, and elder law. He earned his undergraduate B.B.A. degree, *magna cum laude*, from the University of Wisconsin Oshkosh, and his J.D. degree from the University of Wisconsin Law School, where he graduated *cum laude* and was elected vice-president of the Business and Tax Law Society. Mr. Schubert is a member of the State Bar of Wisconsin and the Fox Valley Estate Planning Council, among other professional groups. He has previously served as faculty for continuing education seminars on a variety of estate planning, estate settlement, and elder law topics.

Avery J. Mayne, JD, CELA
Partner at Walny Legal Group in Milwaukee, Wisconsin
Ms. Mayne is certified as an Elder Law Attorney (CELA) by the National Elder Law Foundation. Ms. Mayne focuses her practice in the areas of elder and special needs law. She focuses her caseload on asset protection planning, long term care benefit planning, special needs trust planning, and adult guardianship and protective action litigation. Ms. Mayne is licensed to practice law in both the states of Wisconsin and Illinois. Ms. Mayne earned her Bachelor of Arts degree in Communication, with honors, from the University of Missouri and received her J.D. degree from Marquette University Law School along with a certificate in Alternative Dispute Resolution. As part of her elder law practice, she helps families and individuals with asset protection planning and appeals. Ms. Mayne assists clients seeking eligibility for long-term care benefits (such as Medicaid, Title XIX, family care, and waiver benefits) in the pre-planning and crisis-planning stages.

Jim Cullen *Reverse Mortgage Consultant at University Bank Reverse Mortgage Division in Green Bay, WI*
Mr. Cullen has been working exclusively with the reverse mortgage program since August 2004. In that time he has been a party to over 700 successful reverse mortgage transactions. He has been with University Bank Reverse Mortgage Division since March 2020. Prior to coming to University Bank, Reverse Mortgage Division, Mr. Cullen spent almost five years with CIBC Bank USA and spent three years with MSI Reverse. He got his start in the mortgage business in June 1997 with Norwest Mortgage. In addition to working directly with clients Mr. Cullen also works with other financial professionals and conducts seminars to help them better understand reverse mortgages.

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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