

# Agenda

## Preventing and Recognizing Elder Abuse/Neglect

Financial exploitation  
Caregiver neglect/abuse  
Nursing home neglect/abuse/negligence  
Nursing home duties and liability

M. Norvell  
R. Steller

## Reviewing Out of State and Older Estate Planning Documents

M. Norvell  
R. Steller

## Handling Ethical Issues in Representation of the Elderly

Identifying the client  
Preventing conflicts of interest  
Determining client capacity  
Maintaining client confidentiality

R. Smollar

## Florida Statewide Medicaid Managed Care (SMMC)

Qualification and benefits  
The application process  
Attribution process for married applicants

J. Neufeld

## 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

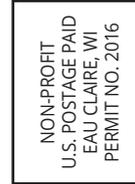
D. Tessier

## Estate Planning Considerations

B. Siegel

## Florida Elder Law and Planning Update

Live, Interactive Webinar - Monday, June 24, 2024



HalfMoon Education Inc.  
PO Box 278  
Altoona, WI 54720-0278



## Learning Objectives

### You'll be able to:

**Recognize** nursing home neglect, abuse and negligence.

**Avoid** conflicts of interest in representing elderly clients or their families.

**Review** and understand old and out-of-state estate planning documents.

**Explore** qualifications and the application process for Florida Statewide Medicaid Managed Care (SMMC).

**Consider** options for asset protection planning.

**Address** your elderly clients' estate planning considerations.



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# HalfMoon Education Inc., Your LIVE Education Leader Presents Florida Elder Law and Planning Update

Live, Interactive Webinar - Monday, June 24, 2024



**Recognize** and prevent elder abuse and neglect

**Handle** ethical issues in the representation of the elderly

**Get tips on** reviewing old and out-of-state estate planning documents

**Discuss** Florida Statewide Medicaid Managed Care (SMMC)

**Assist** elderly clients with their financial planning needs

**Explore** estate planning considerations

### Continuing Education Credits

**Accountants**  
7.2 CPE Credits

**NASBA**  
7.2 CPE Credits

**Attorneys**  
7.0 CLE Hours,  
Including 1.0 Ethics Hour  
and 6.0 Certification Credits  
in Elder Law and Wills, Trusts  
and Estates



# Webinar Information

**Online - Monday, June 24, 2024**

**Log into Webinar**

8:00 - 8:30 am EDT

**Break**

11:45 am - 12:15 pm EDT

**Morning Session**

8:30 - 11:45 am EDT

**Afternoon Session**

12:15 - 3:30 pm EDT

## Tuition

**\$339** for individual registration.

**\$309** for two or more registrants from the same company at the same time.

**Included with your registration:** PDF seminar manual.

## How to Register

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# Faculty

**Denise Tessier** has been a lawyer for over 25 years, admitted in Massachusetts and Connecticut. For many years, she served diligently as in-house counsel for large multinationals, international and start-up operations, rising to general counsel and compliance officer roles. She has extensive expertise in highly complex areas such as global insurance and corporate law, regulatory compliance, and dispute resolution. Now residing in Lake Wales, Florida, she has enthusiastically transitioned her practice to passionately educate and serve her new community on how to protect their children, their families, their legacy and wealth. Her continuous goal is to achieve peace of mind for her clients, whether handling elder concerns or crafting solid estate plans. Ms. Tessier is a graduate of Providence College in Providence, Rhode Island, and Western New England University in Springfield, Massachusetts. In addition to the American Academy of Estate Planning Attorneys, she is an active member of many legal and community organizations including the Estate Planning and Real Property Chapter of the Florida Bar Association, the National Academy of Elder Law Attorneys (NAELA); the Academy of Florida Elder Law Attorneys (AFELA), the American Bar Association's, Real Estate, Trust & Estates Section; Polk County Estate Planning Attorney Bar Association; the Florida Association for Women Lawyers (FAWL) and the American Business Women's Association (ABWA) Lakeland Chapter.

**Jason Neufeld** is the founder, managing partner, and principal attorney with Elder Needs Law PLLC. He serves as lead attorney for medicaid planning, asset protection planning and government benefits preservation planning client matters. Mr. Neufeld directs all new business development; marketing, advertising, website and blogging; community outreach; referral relationship-building; and management of the firm.

**Ryan Jay Smollar** is a native Floridian who is attuned to the diverse needs of his clients. He received his undergraduate degree from Florida State University in Tallahassee and his J.D. degree from St. Thomas School of Law. Mr. Smollar is a passionate advocate for seniors and the families who care about them. His practice is focused towards elder law, estate planning, Medicaid planning, probate administration and asset preservation. Mr. Smollar seeks to help families avoid guardianship through advanced planning when possible. However, in the absence of proactive planning, he can assist responsible family members in becoming the legal guardian for an incapacitated loved one.

**Michael C. Norvell, Esq.** graduated from the University of Florida Fredric G. Levin School of Law in 1976 and was admitted to The Florida Bar in November 1976. Prior to entering law school, he served in the US Army from 1965-1967 where he was part of the field unit of the Ethiopia-U.S. mapping mission. This mission was the last ground mapping of an entire country. Mr. Norvell has been working in the central Florida area as a guardianship attorney for over 30 years. He has two practices in Leesburg, Florida, with one office dedicated to the sole practice of Medicaid and veterans planning. He presently practices primarily in elder law.

**Rhonda Steller** is the manager at Medicaid Planning and Resource Center in Leesburg, Florida. She has been a Medicaid planner for over 19 years.

**Barry D. Siegel, Esq.** is the founder of The Siegel Law Group, P.A. He counsels individuals and families on trust and estate planning, asset protection, elder law planning, Medicaid planning, veterans benefits, and special needs planning. Mr. Siegel also represents beneficiaries and fiduciaries of estates and trusts regarding tax, and probate and trust law issues. He has authored or co-authored many articles on estate planning and asset protection strategies, including *The Book of Estate Planning Strategies*. He is a columnist for the *Boca Raton Tribune*, and he has been quoted in the *South Florida Business Journal*, and the *South Florida Sun-Sentinel*. He's been a guest on numerous television and radio shows, and he is currently writing a book on international asset protection. Mr. Siegel also frequently lectures at many organizations and private functions; and he has served as an adjunct professor for the Legal Studies Program at Florida International University in Miami, Florida. He has traveled extensively teaching estate planning and asset protection to CPAs, financial advisors, insurance agents, and trust officers. Mr. Siegel has also been a featured speaker on estate planning and asset protection issues from a global perspective at the prestigious Global Wealth Summit held in Nassau, Bahamas.

# 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 specialized knowledge. Knowledge of elder law and issues is beneficial, and no advance preparation is recommended. NASBA Sponsor No. 103015.

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HalfMoon Education will provide financial hardship assistance to accountants who wish to attend this event. Contact Frank Chapman at [fchapman@halfmoonseminars.org](mailto:fchapman@halfmoonseminars.org) for details and to apply.

This webinar has been approved by The Florida Bar for a total of 7.0 CLE credits, including 6.0 General CLE Credits and 1.0 Ethics CLE Credit. This webinar has been approved for 6.0 Certification Credits in Elder Law and Wills, Trusts and Estates.

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).

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