



VAELA 2013 *UnProgram*

Virginia Academy of Elder Law Attorneys presents

## VAELA Sixth Annual *unProgram* 2013

Boar's Head Inn Pavilion, Charlottesville, Virginia

### Agenda

#### **Friday, February 22, 2013: Members Forum – Pavilion II-III**

- 9:00 – 10:00 a.m.                    *Registration & Continental Breakfast  
Visit Exhibitors and Sponsors*
- 10:00 – 11:00 a.m.                **Hot Topics in Washington**  
Alfred Chiplin, Esq., Center for Medicare Advocacy
- 11:00 – 11:15 a.m.                    *Break – Visit Exhibitors and Sponsors*
- 11:15 – Noon                        ***US v Commonwealth of Virginia and the Olmstead Decision: Expanding Opportunities  
for Community Integration of Individuals with Developmental Disabilities***  
Aaron Zisser, Esq. and Kyle Smiddie, Esq., US Department of Justice
- Noon – 1:00 p.m.                    *Lunch, sponsored by Middleburg Bank – Pavilion I  
Visit Exhibitors and Sponsors*
- 1:00 – 2:15 p.m.                    **Capacity Evaluations in Close Cases: A Neuropsychologist's View**  
Scott Bender, Ph.D., University of Virginia Institute of Law, Psychiatry & Public Policy
- 2:15 – 3:45 p.m.                    **Judges Panel on Proof and Procedure: When a Family Member Contests a Guardianship**  
Hon. Michael Allen, Retired and Hon. Charles Poston, Norfolk Circuit Court
- 3:45 – 4:00 p.m.                    *Break – Visit Exhibitors and Sponsors*
- 4:00 – 5:15 p.m.                    ***unProgram Topics: Best Practices*** (among possible topics for discussion):  
Litigation related to compensation for fiduciary services  
Attorney advocacy  
Ethics and technology  
Who is the client?
- 6:00 – 7:30 p.m.                    *Cocktail Reception, hosted by BB&T Wealth Management – Pavilion I (casual attire)*
- 7:30 p.m.                              ***Dine-Around*** (*sign-up sheets* to several restaurants are available at the Registration Desk  
for groups to gather and share dinner)

*Effective as of 2-13-13; schedule, courses, speakers and facilitators are subject to change*

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**Saturday, February 23, 2013:**

**Breakfast and Lunch held in the Ballroom across the drive from the Pavilion Building  
All Facilitated Sessions held in the Pavilion Building**

- 7:30 – 8:00 a.m.                    ***Registration for new attendees & Continental Breakfast  
Visit Exhibitors and Sponsors***
- 8:00 – 8:20 a.m.                    **Brief Announcements – Ballroom across the drive from the Pavilion Building**
- 8:30 – 9:20 a.m.                    ***Beginner Track:***  
Contested Guardianship Cases (Karen Fortier, Esq.) – Pavilion I  
***Advanced Track:***  
Dealing with the Commissioner of Accounts: Ethical Issues and Fiduciary Compensation  
(Elizabeth Wildhack, Esq., Ken Labowitz, Esq., Kimberly Pinchbeck, Esq.) – Pavilion II  
Medicaid Planning Strategies (Tim Palmer, CELA) – Ednam West  
Update on Elder Housing Issues in Virginia (Edward Zetlin, Esq.) – Ednam East  
Adult Guardianship: Role of Litigants who Contest Guardianship (Anne Heishman, Esq.) – Boardroom I  
Trustee Liability & the Uniform Prudent Investor Act (Paul Hartley, Esq., Martin Radinsky,  
Glenn Verity, James McConville Esq.) – Boardroom II  
***Practice Management:***  
Conflict of Interest as an Ethical Issue in the Elder Law Practice (Robert Bullock, CELA) – Pavilion III
- 9:30 – 10:20 a.m.                    ***Beginner Track:***  
Veterans' Benefits for the New Elder Law Attorney (Christopher McCarthy, CELA) – Pavilion I  
***Advanced Track:***  
Hospital Discharge Issues: Challenging Discharge Notices and Hospital Sponsored Guardianships  
(Veronica Williams, Esq., Alfred Chiplin, Esq., Shervonne Banks) – Pavilion II  
Drafting Effective Guardianship/Conservatorship Orders (Margaret O'Reilly, CELA) – Boardroom I  
A Primer on Virginia's Mandatory Outpatient Treatment Procedure (Shawn Majette, Esq.) – Ednam East  
Special Needs Transition Issues: Aging Out of School-Based Services (Loretta Morris Williams, CELA,  
Joanne Marcus, Tia Marsili) – Boardroom II  
Medicaid Planning Strategies (Timothy Palmer, CELA) – Ednam West  
***Practice Management:***  
Wearing Your HR Hat: Hiring & Keeping the Right Staff (Cammie Hauser, Melanie Lee, Esq) – Pavilion III
- 10:20 – 11:00 a.m.                    ***Break – Visit Exhibitors and Sponsors***
- 11:00-11:50 a.m.                    ***Beginner Track:***  
Medicaid Planning for the New Elder Law Attorney (Susan Jean, CELA) – Pavilion I  
***Advanced Track:***  
The Intersection Between Family Law and Elder Law (Phoebe Hall, Esq.) – Ednam West  
Financial Exploitation by Agents Under POAs/Other Trusted Loved Ones (Karen Fortier, Esq) – Pavilion III  
Issues with Special Needs Trusts: Drafting and Administration (Elizabeth Gray, CELA) – Boardroom I  
Using Trusts in Medicaid and Veterans' Asset Protection Planning (Evan Farr, CELA,  
Christopher McCarthy, CELA) – Ednam East  
Dealing with the Commissioner of Accounts: Ethical Issues and Fiduciary Compensation  
(Elizabeth Wildhack, Esq., Ken Labowitz, Esq., Kimberly Pinchbeck, Esq.) – Pavilion II  
***Practice Management:***  
My Favorite Apps: Technology and the Practice of Law (Olivier Denier Long, Esq.,  
Yahne Miorini, Esq.) – Boardroom II
- Noon – 1:20 p.m.                    ***Lunch, sponsored by Quinn/Farmer Auctions – Ballroom across drive from Pavilion  
Visit Exhibitors and Sponsors***

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## Saturday, February 23, 2013, Continued

- 1:30 – 2:20 p.m.      ***Beginner Track:***  
Basics of Administering Special Needs Trusts (Elizabeth Gray, CELA) – Pavilion I  
***Advanced Track:***  
Hospital Discharge Issues: Challenging Discharge Notices and Hospital Sponsored Guardianships (Veronica Williams, Esq., Alfred Chiplin, Esq., Shervonne Banks) – Pavilion II  
Using Trusts in Medicaid and Veterans' Asset Protection Planning (Evan Farr, CELA, Christopher McCarthy, CELA) – Ednam East  
The Intersection Between Family Law and Elder Law (Phoebe Hall, Esq.) – Ednam West  
Adult Guardianship: Role of Litigants who Contest Guardianship (Anne Heishman, Esq.) – Boardroom I  
***Practice Management:***  
Making an Elder Law Practice More Efficient (Andrew Hook, CELA, Sandra Buhr) – Pavilion III  
My Favorite Apps: Technology and the Practice of Law (Olivier Denier Long, Esq., Yahne Miorini, Esq.) – Boardroom II
- 2:30 – 3:20 p.m.      ***Beginner Track:***  
Role of the GAL for Adults After the Order is Entered (Ron Feinman, Esq.) – Pavilion I  
***Advanced Track:***  
Special Needs Transition Issues: Aging Out of School-Based Services (Loretta Morris Williams, CELA, Joanne Marcus, Tia Marsili) – Boardroom II  
Litigating Undue Influence/Capacity Cases (James McConville, Esq.) – Pavilion II  
Update on Elder Housing Issues in Virginia (Edward Zetlin, Esq.) – Ednam East  
PACE Program: What Is It and What Does It Mean for Our Clients? (Elizabeth Bircher, Esq) – Ednam West  
Drafting Effective Guardianship/Conservatorship Orders (Margaret O'Reilly, CELA) – Boardroom I  
***Practice Management:***  
Making an Elder Law Practice Profitable (Rhona Levine, Esq.) – Pavilion III
- 3:00 – 5:00 p.m.      ***Appraisal Fair: Offered by Quinn/Farmer Auctions – Registration Desk Area***  
Up to 2 items may be submitted for free appraisal
- 3:20 – 3:40 p.m.      ***Break – Visit Exhibitors and Sponsors***
- 3:40 – 4:30 p.m.      ***Beginner Track:***  
Probate and Administration of an Estate (Rhona Levine, Esq.) – Pavilion I  
***Advanced Track:***  
A Primer on Virginia's Mandatory Outpatient Treatment Procedure (Shawn Majette, Esq.) – Ednam East  
Domestic Asset Protection Trusts and Decanting (Rhonda Miller, Esq.) – Ednam West  
Litigating Undue Influence/Capacity Cases (James McConville, Esq.) – Pavilion II  
***Practice Management:***  
Making an Elder Law Practice More Efficient (Andrew Hook, CELA, Sandra Buhr) – Pavilion III  
Open Discussion: Talk About What You Want (Elizabeth vonKeller, Esq.) – Boardroom I
- 4:15 – 5:00 p.m.      ***Bonus session:***  
Conflict of Interest as an Ethical Issue in the Elder Law Practice (Robert Bullock, CELA) – Boardroom II

## Sunday, February 24, 2013

- 11:00 a.m.              Get-Together Brunch, Boar's Head Inn, Old Mill Room  
Optional event, **please sign up** on the sheet available at the *Un*Program Registration Desk

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