



2024 UnProgram Agenda

Williamsburg Lodge

February 21-23, 2024

(Agenda as of 01.31.24 and Subject to Change)

Wednesday, February 21 (VAELA Members & Paralegals Only)

Beginner Seminar

2:00 pm – 3:00 pm

- Solving the Insolvent Estate Puzzle – Beth C. Driver, Esq. **Allegheny C**
- Special Needs Trusts & ABLE Accounts 101 – Neal L. Walters, Esq. **Tidewater A**

3:00 pm – 3:15 pm Break

3:15 pm – 4:15 pm

- Best Practices Before Your Local Commissioner of Accounts 2023 – Kimberly A. Pinchbeck, Esq., Elizabeth L. Wildhack, Esq., & Amanda J. Foster, Esq. **Allegheny C**
- Planning with Irrevocable Trusts – Materials by Evan Farr, Esq. CELA, CAP & used by permission, and presented by Simon J. Stapleton, Esq. **Tidewater A**

Advanced Seminar

2:30 pm – 4:00 pm Five Years of Guardianship Legislation: The Underlying Public Policy and Resulting Changes to Guardianship Proceedings – Amy E. McCullough, Esq. & Stephen D. Burns, Esq. **Allegheny AB**

5:30 pm - 6:30 pm Welcome Reception Sponsored by [Cumberland Trust](#) (Registered Attendees & Spouses Only - RSVP Required) **Colony Foyer**

Thursday, February 22

7:30 am – 8:50 am Breakfast; Visit Sponsors & Exhibitors **Colony Room**

8:50 am – 9:00 am Welcome by Jesci Norrington, VAELA President **Colony Room**

9:00 am – 10:30 am Incorporating AI in Legal Practice: From ChatGPT to Everyday Applications – Nicole Black, Esq. *Thanks to Our Speaker Sponsors* [Minnesota Lawyers Mutual Insurance](#) & [The Million Dollar Solution](#) **Colony Room**

10:30 am – 10:45 am Break; Visit Sponsors & Exhibitors **Colony Room**

10:45 am – 12:15 pm Being Mindful about Balance – How to Navigate the Demands of Being an Elder Law Attorney - Hetal M. Challa Esq., Barbara Mardigian, LPC, Teirra M. Everette, Esq., Kristen R. Jurjevich, Esq., & Jennifer L. Ligon, Esq. **Colony Room**

12:15 pm – 1:45 pm Lunch Sponsored by [ElderTree Care Management](#) & [West Financial Services](#) **Colony Room**

1:45 pm – 2:00 pm Visit Sponsors & Exhibitors **Colony Room**

2:00 pm – 2:15 pm Update from VAELA Public Policy and Communications & Member Relations Committees **Colony Room**

2:15 pm – 2:30 pm Presentation by Laurie MacNaughton, [Atlantic Coast Mortgage](#) **Colony Room**

2:30 pm – 4:00 pm *UnProgram* Breakout Discussions

- Guardianship/Conservatorship **Colony Room**
- Estate Planning & Administration **Allegheny A**
- Special Needs Planning **Allegheny B**
- Medicaid Planning **Allegheny C**
- \$0.02/Dark Glasses Discussion **Patriot Room**

5:00 pm – 6:00 pm Cocktail Reception *Sponsored by [Atlantic Coast Mortgage](#) (Registered Attendees & Spouses Only)* **Colony Foyer**

6:00 pm – 7:00 pm Elder Law Trivia Game (Optional) **Colony Room**

Friday, February 23

7:30 am – 8:50 am Breakfast; Visit Sponsors & Exhibitors **Colony Room**

9:00 am – 10:00 am Breakout Session I

- Estate Administration for the Estate Planner: Begin with the End in Mind – Jennifer D. Kahl, Esq. **Allegheny A**
- Reverse Mortgage: An Additional Solution for Solving Equitable Distribution of Real Property in Silver Divorce – Laurie MacNaughton **Allegheny B**
- The 300% Solution: Understanding Medicaid Community Based Care with an Emphasis on How VAELA Proposes to Overcome the Income Limit – Edward Zetlin, Esq. **Allegheny C**
- The Law on Guardians ad litem in Contested Adult Guardianship Cases – Virginia C. Haizlip, Eq. & Beth A. Norton, Esq. **Tidewater C**
- Succession Planning - Joyvan Malbon-Griffin, Esq. **Tidewater D**

10:00 am – 10:20 am Break; Visit Sponsors & Exhibitors **Colony Room**

10:20 am – 11:20 am Breakout Session II

- Introduction to Crisis Medicaid Matters & Basic Resource Protection in Long Term Care Crises – Ari N. Sommer, Esq. **Allegheny A**
- Legal and Financial Unity for Seniors: A Teamwork Approach – Natalie T. Page, Esq., and Arvette M. Reid **Allegheny B**
- The TCJA Sunset Provisions and the Subsequent Landscape – Daniel Tirle, Esq. **Allegheny C**
- Special Needs Trusts and Settlement Protection Trusts to Protect Beneficiaries – Elizabeth L. Gray, Esq., CELA, CAP, Rachel Baer, Esq., & Lamy Moosa, Esq. **Tidewater C**
- Succession Planning - Joyvan Malbon-Griffin, Esq. **Tidewater D**

11:30 am – 12:30 pm Breakout Session III

- Adult Guardianship & Conservatorship Nuts & Bolts – Ross Hart, Esq. **Allegheny A**
 - Legal and Financial Unity for Seniors: A Teamwork Approach – Natalie T. Page, Esq., and Arvette M. Reid **Allegheny B**
- Continued*

- Keys to a Successful Elder Law Practice – Robert W. Haley, Esq. CELA, CAP & Jeremy L. Pryor, Esq. **Allegheny C**
- Special Needs Trusts and Settlement Protection Trusts to Protect Beneficiaries – Elizabeth L. Gray, Esq., CELA, CAP, Rachel Baer, Esq., & Lamy Moosa, Esq. **Tidewater C**
- In Hot Water with the Commissioner? How to Address – and Avoid – Issues with the Commissioner of Accounts – Sarah C. Aviles, Esq. **Tidewater D**

12:30 pm – 1:30 pm – Lunch Sponsored by [Independent You](#) and [Members Trust Company](#) **Colony Room**

1:30 pm – 1:50 pm Visit Sponsors and Exhibitors **Colony Room**

1:50 pm – 2:50 pm Breakout Session IV

- Reverse Mortgage: An Additional Solution for Solving Equitable Distribution of Real Property in Silver Divorce – Laurie MacNaughton **Allegheny A**
- The 300% Solution: Understanding Medicaid Community Based Care with an Emphasis on How VAELA Proposes to Overcome the Income Limit – Edward Zetlin, Esq. **Allegheny B**
- Introduction to Crisis Medicaid Matters & Basic Resource Protection in Long Term Care Crises – Ari N. Sommer, Esq. **Allegheny C**
- Adding Value to the Life of Elderly Clients Beyond Legal Services: Incorporating Life Care Planning into the Practice of Elder Law – Scott N. Alperin, Esq. **Tidewater C**
- In Hot Water with the Commissioner? How to Address – and Avoid – Issues with the Commissioner of Accounts – Sarah C. Aviles, Esq. **Tidewater D**

3:00 pm – 4:00 pm Breakout Session V

- Keys to a Successful Elder Law Practice – Robert W. Haley, Esq. CELA, CPA & Jeremy L. Pryor, Esq. **Allegheny A**
- The Law on Guardians ad litem in Contested Adult Guardianship Cases – Virginia C. Haizlip, Esq. & Beth A. Norton, Esq. **Allegheny B**
- Estate Administration for the Estate Planner: Begin with the End in Mind – Jennifer D. Kahl, Esq. **Allegheny C**
- Adding Value to the Life of Elderly Clients Beyond Legal Services: Incorporating Life Care Planning into the Practice of Elder Law – Scott N. Alperin, Esq. **Tidewater C**
- The TCJA Sunset Provisions and the Subsequent Landscape – Daniel Tirle, Esq. **Tidewater D**