

FACULTY

Lauren L. Fink

Course Co-Chair
Maser Amundson Boggio P.A.
Richfield

Brenna M. Galvin

Course Co-Chair
Maser Amundson Boggio P.A.
Richfield

Mark Anderson

Schmitz, Schmidt & Anderson P.A.
Saint Paul

Lisa Chesley

Chesley Law Firm
Mankato

Mark D. Munson, CELA

Ruder Ware, L.L.S.C.
Wausau, WI

Mary Frances Price

Long Reher Hanson Price P.A.
Minneapolis

Jill M. Sauber

Sauber Legal Services LLC
Minneapolis

Laura Zdychnec

Long Reher Hanson Price P.A.
Minneapolis

Nonprofit Org.
U.S. Postage
PAID
Minnesota Continuing
Legal Education

Minnesota Continuing
Legal Education
2550 UNIVERSITY AVE W #160-S, SAINT PAUL MN 55114



DATED MATERIAL – PLEASE EXPEDITE!



*Two new, practical, half-day seminars,
with insight from experienced medical
assistance attorneys*

Medical Assistance Fundamentals

Advanced Medical Assistance Strategies for the Elderly Client

WEDNESDAY, APRIL 21, 2021
Live Online Only –
No in-person attendance

 Minnesota Continuing Legal Education
Your Success Is Our Goal

Attend both courses
and **SAVE \$50!**

*Two new, practical, half-day seminars,
with insight from experienced medical
assistance attorneys*

Medical Assistance Fundamentals

Fundamental Topics Include:

- Medical Assistance Program Overview
- Client Intake and the Initial Meeting: How to Ask the Right Questions
- Medical Assistance Income Budget Basics and Traps

Advanced Medical Assistance Strategies for the Elderly Client

Advanced Topics Include:

- QDRO Planning
- Irrevocable Trust Update
- Advanced Transfers and Exceptions

Join your colleagues for a BONUS networking lunch session:
Ask a Medical Assistance Attorney. Bring your questions for this
interactive meeting.

WEDNESDAY, APRIL 21, 2021

Live Online Only – No in-person attendance

In-Person Passholders: You may use your Pass to register for the online programs.

Medical Assistance Fundamentals

8:30 – 9:00 a.m. JOIN ONLINE

9:00 – 9:30 a.m.

Client Intake and the Initial Meeting: How to Ask the Right Questions

This session focuses on the first contacts with a potential client, including topics of discussion at the initial meeting and what information to gather to put your best case forward.

– Lisa Chesley

9:30 – 9:35 a.m. BREAK

9:35 – 10:35 a.m.

The Basics: Medical Assistance Program Overview (LTC)

This session is a “mile wide, inch deep” overview of Medical Assistance (long-term care) benefits, including eligibility requirements, asset limits, spousal impoverishment rules, timing of placement/assessment, and transfer penalties.

– Jill M. Sauber

10:35 – 10:40 a.m. BREAK

10:40 – 11:10 a.m.

Medical Assistance Income Budget Basics and Traps: How to Ensure Your Planning Is Appropriate for the Client

This session will explore how to calculate an income budget for Medical Assistance for Long-Term Care, as well as explore the differences in calculating a budget for Medical Assistance Elderly Waiver.

– Lauren L. Fink

11:10 – 11:15 a.m. BREAK

11:15 a.m. – 12:00 p.m.

In Sickness and In Health, ‘Til Death Do Us Part: Medical Assistance Planning Strategies for Married Couples

When couples marry, they are often focus on the happily ever after. Unfortunately, the realities of aging sometimes interfere with their best laid plans. This session will cover Medical Assistance planning considerations for married couples that will enable the ill spouse to receive the care they need while still providing financial stability for the community spouse. Topics will include transfers to spouses, spousal annuities, and asset reduction strategies. It will also feature case studies.

– Brenna M. Galvin

12:00 – 12:45 p.m.

OPTIONAL NETWORKING LUNCH SESSION

Ask a Medical Assistance Attorney

(not for CLE credit)

This interactive lunch will allow you to ask your burning questions to a room of experienced medical assistance professionals, discuss going-ons in the medical assistance community, and connect with colleagues. This lunch is open to those who attend either the morning or afternoon program, at no additional cost.

Advanced Medical Assistance Strategies for the Elderly Client

12:30 – 1:00 p.m. JOIN ONLINE

1:00 – 2:15 p.m.

Irrevocable Trusts and Medical Assistance Planning In Minnesota: What It Is and What It Should Be

Elder Law Attorneys across the United States have long-utilized irrevocable trusts for their clients as a Medicaid planning strategy. Since 2005, Minnesota practitioners have been thwarted by a Minnesota statute that is more restrictive than what is allowed under federal law. Attorneys Mark Munson (Wisconsin) and Laura Zdychnec will provide an overview of the current state of Minnesota law, what it could be, and what we need to do about it.

– Mark D. Munson
Laura Zdychnec

2:15 – 2:20 p.m. BREAK

2:20 – 3:05 p.m.

Advanced Transfers and Exceptions

– Mark Anderson

3:05 – 3:10 p.m. BREAK

3:10 – 4:10 p.m.

Long Term Care Planning with Qualified Domestic Relations Orders (QDRO): the Where, When, Why and How?

This session will cover the use of a Qualified Domestic Relations Orders (QDRO) in long term care planning, and how this strategy, normally only utilized in marital dissolutions, can be expanded to allow clients to protect retirement assets for the community spouse. This will examine what case scenarios would be appropriate for this type of planning and how to start using this strategy with clients.

– Mary Frances Price

COURSE INFORMATION

ONLINE PROGRAMS

Wednesday, April 21, 2021
View online at www.minncle.org
Registration for live webcasts must be made online at www.minncle.org

IN-PERSON PASSHOLDERS

You may use your Pass to register for the online programs at no charge.

COURSE MATERIALS

All course materials will be provided electronically.

CREDITS

Minnesota CLE is applying to the State Board of CLE for **2.75 standard CLE credits for the morning seminar** and **3.0 standard CLE credits for the afternoon seminar**.

SCHOLARSHIPS AVAILABLE

Minnesota CLE maintains a scholarship program for those individuals with a financial need. For more information or to obtain a scholarship application, contact Grant at gdavies@minncle.org.

CANCELLATION POLICY / NO-SHOW POLICY

Paid registrants who cancel before the program will receive a full credit on their account, or refund upon request. Paid registrants who do not cancel and are unable to attend will retain access to the seminar materials through their website account. Passholders may purchase the materials at 50% of the full retail price.

ACCOMMODATION

If you have a disability and need an accommodation in order to attend, please contact us as soon as possible at 2550 University Avenue West, Suite 160-S, Saint Paul, MN 55114 or call us at 651-227-8266 or 800-759-8840.

QUESTIONS?

Please call Minnesota CLE at **651-227-8266** or **800-759-8840**. Or, visit www.minncle.org.

Register today at www.minncle.org

Medical Assistance Fundamentals

Advanced Medical Assistance Strategies for the Elderly Client

WEDNESDAY, APRIL 21, 2021
ATTEND ONLINE

ONLINE PROGRAMS:
WEDNESDAY, APRIL 21, 2021

Registration must be made online at www.minncle.org

TUITION PER COURSE:

\$155 MSBA member

\$155 paralegal

\$175 standard rate

Passholders attend at no charge.

In-Person Passholders –

You also may use your Pass to register for these online programs at no charge.

AM: 3638-21
PM: 3639-21
ams | PAjre

Save \$50!

REGISTER FOR BOTH AND SAVE!

Register for both courses and save \$50.

NEW LAWYER DISCOUNT!

New lawyers who have been admitted to the bar fewer than 3 years receive a 50% discount.

SCHOLARSHIPS AVAILABLE

Minnesota CLE maintains a scholarship program for those individuals with a financial need. To obtain a scholarship application, contact Grant at gdavies@minncle.org.

JOIN THE MSBA AND PAY LESS FOR MINNESOTA CLE SEMINARS!

To join, go to www.mnbar.org

Or for more membership advantages call 1-800-882-6722.

CAN'T ATTEND?

You can purchase the materials for \$50 per program (plus tax and handling) by calling Minnesota CLE at 800-759-8840 or 651-227-8266. Available in hardcopy. Orders will be filled after the seminars.

