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DATED MATERIAL – PLEASE EXPEDITE!



ATTEND IN PERSON FOR:

- A refreshing break from your office and screens
- Delicious coffee brewed fresh and served hot all day
- Faculty access: meet and ask questions of faculty
- A tasty lunch, snacks and refreshments
- Fun ways to connect with your colleagues in the elder law community

CREDITS

Minnesota CLE has applied to the State Board of CLE for **10.5 CLE credits, including 1.0 ethics credit**. The maximum number of total credits attendees may claim is 10.5.

ACCOMMODATION

If you have a disability and need an accommodation in order to attend this seminar, contact Minnesota CLE as soon as possible at **800-759-8840** or **customerservice@minncle.org**.

SCHOLARSHIPS AVAILABLE

Minnesota CLE maintains a scholarship program for those with a financial need. Contact Grant at **gdavies@minncle.org** or **651-254-2103** for further details or to obtain an application.

CANCELLATION / NO-SHOW POLICY

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

COURSE INFORMATION

LIVE IN PERSON

Thursday & Friday, October 5 & 6, 2023
Minnesota CLE Conference Center
 600 Nicollet Mall, Suite 370
 Third Floor City Center, Minneapolis

ONLINE REPLAY

Monday & Tuesday, November 6 & 7, 2023
View online at www.minncle.org

The online replay will include all plenary and breakout sessions. A moderator will be available to answer questions by e-mail. You will receive all the in-person content with the convenience and accessibility of participating online. All materials will be provided electronically.

HOW TO REGISTER

Register online at www.minncle.org. Email **customerservice@minncle.org** or call **800-759-8840** for assistance.

COURSE MATERIALS

In-Person Attendees

Course materials will be provided to inperson attendees in hard copy. In-person attendees will also have electronic access to the course materials via their Minnesota CLE website accounts.

Online Replay Attendees

Online replay attendees will have electronic access to the course materials via their Minnesota CLE website accounts.



Co-Sponsored by
 Minnesota CLE and the
 Elder Law Section of the
 Minnesota State Bar Association

**Thursday & Friday,
 October 5 & 6, 2023 –
 Attend In Person**

The 2023

Elder Law Institute

Helping You Keep Pace with the Needs of an Aging Population



Judith Stein is the Executive Director of the Center for Medicare Advocacy, which she founded in 1986. Ms. Stein has focused on legal representation of older people and people with disabilities since beginning her legal career in 1975. From 1977 until

1986, Ms. Stein was Co-Director of Legal Assistance to Medicare Patients (LAMP), where she managed the first Medicare advocacy program in the country. She has extensive experience in developing and administering advocacy projects, representing Medicare beneficiaries, producing educational materials, teaching and consulting.

Ms. Stein presents ***Medicare for People with Chronic and Disabling Conditions: 10 Years After the Jimmo Settlement.***

Plus **23 insightful presentations** on:

- Long-term care
- Medical assistance
- Guardianship
- Testamentary capacity
- Electronic wills
- Marijuana use
- And more!

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Can't attend in person?
 View the online replay on
 November 6 & 7, 2023

The 2023

Elder Law Institute

**Thursday & Friday,
 October 5 & 6, 2023 –
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DAY 1 – THURSDAY, OCTOBER 5

MORNING PLENARY

8:30 – 9:00 a.m.
CHECK-IN & CONTINENTAL BREAKFAST

9:00 – 9:10 a.m.
WELCOME AND ANNOUNCEMENTS
Callyn T. Bedker & Lauren L. Fink
Institute Co-Chairs

9:10 – 9:55 a.m. Legislative and Case Law Update

Join Suzanne Scheller, Chair of the Legislative Committee for the Elder Law Section, for the annual legislative and case law update. The 2023 Minnesota Legislative Session was active. Learn about recent changes in the law since our last Elder Law Institute that may impact your practice and our clients, including medical assistance, adult protection, survivability of claims, housing, and other areas. Also, we will discuss items potentially on the horizon for 2024.

Suzanne M. Scheller

9:55 – 10:05 a.m. BREAK

10:05 – 11:05 a.m.

Medicare for People with Chronic and Disabling Conditions: 10 Years After the Jimmo Settlement

Note: This will be a remote presentation

This presentation will explore the importance of skilled therapy services to maintain, or prevent or slow deterioration of, an individual's condition, which is the requirement for skilled service coverage under Medicare law. Improvement, as so many still believe, is not required under the law. The presentation will include a discussion of the *Jimmo v. Sebelius* Improvement Standard case which clarified this standard, and its enforcement, including resources for advocates.

Judith A. Stein

11:05 – 11:10 a.m. BREAK

11:10 a.m. – 12:10 p.m.

Testamentary Capacity and Undue Influence in Dementia

The presence of dementia is frequently a factor in cases of testamentary capacity and undue influence. Clinical determination of dementia is complex and in its early stages a challenge to unravel. Yet, the presence of dementia does not in and of itself mean that testamentary capacity has been lost or that undue influence has occurred. Dr. Orr will first describe how dementia is recognized by clinicians and the many barriers to making a diagnosis. He then will use examples to illustrate how and when cognitive impairment can lead to loss of testamentary capacity. Finally, Dr. Orr will discuss a variety of age-related issues that make a person vulnerable to undue influence, including dementia.

Dr. William Orr

Session descriptions available at www.minncle.org

LUNCH AND AWARDS CEREMONY
(Lunch provided by Minnesota CLE)

12:10 – 1:15 P.M.

	1:15 – 2:15 P.M. BREAKOUT SESSION A	2:30 – 3:30 P.M. BREAKOUT SESSION B	3:45 – 4:45 P.M. BREAKOUT SESSION C
FUNDAMENTALS	101 My First Elder Law Case <i>Jill M. Sauber</i>	201 An Introduction to Medical Assistance <i>Lauren L. Fink</i>	301 My First Sip of Alphabet Soup: The ABCs of Public Benefits <i>Laura J. Zdychnec</i>
HOTTOPICS IN ELDER LAW	102 Marijuana Use and Older Adults: What Elder Law Attorneys Need to Know About Use and Minnesota's New Laws <i>Dr. Emily Escue</i>	202 A Closer Look at 5 Critical Elder Law Cases: Ecklund, Post-Geyen, Schubert Trust, Zika and Deverell <i>Christopher J. Kradle</i> <i>Mary Frances Price</i> <i>J. Noble Simpson</i> <i>Cathryn D. Reher, moderator</i>	302 What Fiduciaries Need to Know and How to Advise Them <i>Rebecca Reich</i> <i>Traci J. Sherman</i> <i>Binh T. Tuong</i> <i>Sarah B. Sicheneder, moderator</i>
LONG-TERM CARE	103 Options for Aging in Place: A Panel Discussion <i>Rachel Hulsizer</i> <i>Libby Rossett-Brown</i> <i>Sean B. Burke, moderator</i>	203 How to Make Effective Complaints About Care in Long-Term Care Facilities <i>Genevieve E. Gaboriault</i> <i>Marit A. Peterson</i> <i>Suzanne M. Scheller</i>	303 Advanced Medical Assistance: How to Handle Complex Cases and Tricky Scenarios <i>Margaret "Pook" M. Grathwol</i> <i>Cathryn D. Reher</i> <i>Julian J. Zweber</i>
	2:15 – 2:30 p.m. BREAK	3:30 – 3:45 p.m. BREAK	

DAY 2 – FRIDAY, OCTOBER 6

MORNING PLENARY

8:30 – 9:00 a.m.
CONTINENTAL BREAKFAST

9:00 – 9:05 a.m.
WELCOME & ANNOUNCEMENTS

9:05 – 9:50 a.m. 2023 DHS Update: The Reorganization of DHS, MNChoices Assessments, and MA-EPD Over 65

Speaker TBA

9:50 – 9:55 a.m. BREAK

9:55 – 10:55 a.m. Ethics and Chat GPT: Your New BFF or the End of Lawyering

1.0 ethics credit applied for
Eric T. Cooperstein

10:55 – 11:05 a.m. BREAK

11:05 A.M. – 12:05 P.M.
BREAKOUT SESSION D

FUNDAMENTALS	401 My First Special Needs Client <i>Jeffrey W. Schmidt</i>
ADVANCED	402 How to Protect Older Adults from Scams and Financial Exploitation <i>Parker J. Maertz</i>
UPDATES	403 MA Update: Beyond the Basics <i>Amber M. Hildebrandt</i> <i>Julian J. Zweber</i>

LUNCHBREAK
(on your own)

12:05 – 12:45 P.M.

12:45 – 1:45 P.M.
BREAKOUT SESSION E

501 Guardianship and Conservatorship Fundamentals <i>Megan C. Kelly</i>
502 10 Tech Tips for the Elder Law Attorney <i>Jess L. Birken</i>
503 2023 Estate Recovery Update <i>Mark A. Eekhoff</i>

1:45 – 2:00 p.m. BREAK

2:00 – 3:00 P.M.
BREAKOUT SESSION F

601 Navigating All the Aspects of Your First Elder Law Case from Start to Finish – A Scenario-Based Discussion <i>Megan C. Kelly</i> <i>Jill M. Sauber</i> <i>Jeffrey W. Schmidt</i> <i>Laura J. Zdychnec</i> <i>Lauren L. Fink, moderator</i>
602 Minnesota's New Law on Electronic Wills <i>J. Steve Nys</i> <i>Cameron Kelly</i>
603 2023 Veterans Benefits Update <i>Mary Frances M. Price</i>

Register online today at www.minncle.org

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TUITION:

\$495 MSBA member
\$495 paralegal
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