

## GENERAL INFORMATION

Register at [www.minncle.org](http://www.minncle.org)

### LIVE IN PERSON

Thursday, May 14, 2026  
Minnesota CLE Conference Center  
600 Nicollet Mall, Suite 370  
Third Floor City Center, Minneapolis

### ONLINE REPLAY

Friday, June 12, 2026  
View online at [www.minncle.org](http://www.minncle.org)  
A moderator will be available to answer questions by email.

### HOW TO REGISTER

Register online at [www.minncle.org](http://www.minncle.org).  
Email [customerservice@minncle.org](mailto:customerservice@minncle.org) or call **800-759-8840** for assistance.

### COURSE MATERIALS

In-person attendees will receive hard copies of any course materials submitted. All attendees will have access to all course materials via their Minnesota CLE online accounts.

### CREDITS

Minnesota CLE is applying to the Minnesota State Board of CLE for **6.0 CLE credits, including 1.0 elimination of bias credit.** The maximum number of total credits attendees may report for this seminar is 6.0.

### SCHOLARSHIPS AVAILABLE

Minnesota CLE maintains a scholarship program for those with a financial need. Contact [customerservice@minncle.org](mailto:customerservice@minncle.org) for further details or to obtain an application.

### 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](mailto:customerservice@minncle.org).

### CANCELLATION POLICY / NO-SHOW POLICY

Paid registrants who cancel before the seminar will receive a refund. Paid registrants who do not cancel and are unable to attend will retain access to all seminar materials through their Minnesota CLE website account.

## QUESTIONS?

[customerservice@minncle.org](mailto:customerservice@minncle.org)  
[www.minncle.org](http://www.minncle.org)  
800-759-8840

# The 2026 Medical Assistance Conference

## Thursday, May 14, 2026 – Attend In Person

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600 Nicollet Mall, Suite 370, Minneapolis

### Can't attend the live seminar?

View the online replay Friday, June 12, 2026  
[www.minncle.org](http://www.minncle.org)

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Email [customerservice@minncle.org](mailto:customerservice@minncle.org) or call **800-759-8840** for assistance.

### TUITION:

\$345 MSBA member  
\$345 paralegal  
\$395 standard rate

### SEASON PASSHOLDERS:

- **Super Passholders** may attend the in-person seminar or the online replay at no charge.
- **In-Person Passholders** may attend the in-person seminar at no charge or the online replay for 50% off.
- **Online Passholders** may attend the in-person seminar for 50% off or the online replay at no charge.

### NEW LAWYER DISCOUNT!

New lawyers who have been admitted to the bar less than 5 years receive a 50% discount.

### SCHOLARSHIPS AVAILABLE

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### JOIN THE MSBA AND PAY LESS FOR MINNESOTA CLE SEMINARS!

To join, go to [www.mnbar.org](http://www.mnbar.org)  
Or for more membership advantages call 1-800-882-6722.

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DATED MATERIAL – PLEASE EXPEDITE!



# The 2026 Medical Assistance Conference



Minnesota Continuing Legal Education  
Your Success Is Our Goal

# The 2026 Medical Assistance Conference

*This practical conference offers both fundamental instruction on the basics of Medical Assistance and the latest insights from our faculty of Medical Assistance experts.*

### AT THE CONFERENCE, YOU WILL LEARN:

- ▶ The laws governing housing providers who accept Medical Assistance as a payor source
- ▶ The relationship between bias and estate recovery
- ▶ How excess income producing assets are treated
- ▶ Advanced annuity planning strategies
- ▶ Plus, the essentials of Medical Assistance application, eligibility and asset reduction strategies
- ▶ And more!

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View the Online Replay on Friday, June 12.

View information on your mobile device or register online.



Thursday, May 14, 2026 – Attend In Person

# Schedule

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

9:00 – 9:10 a.m.  
**Welcome & Introduction**  
– *Lauren L. Fink, Conference Co-chair*  
– *Brenna M. Galvin, Conference Co-chair*

9:10 – 10:10 a.m.  
**Housing and Moving and Discharge, Oh My!**  
What happens when clients are threatened with discharge from their long-term care provider? Gain familiarity with the laws governing housing providers that accept Medical Assistance as a payor source. Learn practical tips and pretermination efforts to avoid discharge and keep your clients out of a care crisis. Stay on top of law changes that are impacting resident rights in long-term care.  
– *Benjamin T. Kaufman*  
– *Suzanne M. Scheller*

10:10 – 10:20 a.m.  
BREAK

10:20 – 11:20 a.m.  
**Medicaid Estate Recovery: Negative Consequences, Including Racial Wealth Impacts, and Federal and State Pathways to Change**

*1.0 elimination of bias credit applied for*  
Federal Medicaid law requires states to pursue estate recovery for long-term care benefits paid on behalf of individuals age 55+. No other public benefit program imposes such recoveries. This session examines the legal framework for estate recovery under 42 U.S.C. § 1396p, including required recoveries for LTSS and related services, mandatory exemptions and deferrals, and state discretion in defining “estate” and implementing hardship waivers. The session will present the harms caused by estate recovery, including how estate recovery can reinforce racial and disability-based wealth disparities by targeting the modest “first asset” many families hold—home equity—and by imposing disproportionate burdens on communities with lower intergenerational wealth. The session will review national repeal efforts, including this year’s Stop Unfair Medicaid Recoveries Act, and compare Minnesota’s estate recovery program to those of other states, with a focus on advocacy opportunities.  
– *Eric M. Carlson*

11:20 – 11:30 a.m.  
BREAK

11:30 a.m. – 12:30 p.m.  
**Making (and Breaking) Medical Assistance Law: Litigation Lessons, Strategic Choices, and the Cost of Bad Facts**  
This session examines major Medical Assistance cases involving eligibility determinations, asset treatment, and estate recovery, with a focus on retrospective analysis: what arguments worked, what backfired, and what they would do differently if given the chance. Particular attention will be paid to the risks of “dabbling” in Medical Assistance litigation, the ethical and professional responsibility considerations when advancing novel arguments, and how bad facts can create bad law that harms future clients and entire practice areas. Attendees will gain practical guidance on identifying cases suitable for impact litigation, preserving clean records, collaborating with experienced advocates, and making intentional choices that advance client interests while strengthening—rather than undermining—Medical Assistance jurisprudence.  
– *Mary Frances Price*  
– *J. Noble Simpson*

12:30 – 1:30 p.m.  
**Lunch & Luncheon Recognition of Julian J. Zweber**

12:30 – 12:45 p.m.  
LUNCH (provided to in-person attendees)

12:45 – 1:15 p.m.  
**Recognition of Julian J. Zweber**

1:15 – 1:30 p.m.  
BREAK

1:30 – 2:30 p.m.  
**Small Group Session A**

101  
**Preparing Medical Assistance Applications: Where One Missing Document Can Ruin Your Week**  
This basic session provides attorneys with a practical, step-by-step overview of the process for preparing and submitting a Medical Assistance application. Taught by an experienced paralegal with extensive hands-on involvement in Medical Assistance cases, the session focuses on the day-to-day mechanics that support effective legal representation.  
– *Cassie J. Iverson*

102  
**Exploring Excess Income Producing Asset Exception to the Community Spouse Asset Allowance**  
This session will explore the Medical Assistance law, developing policy, and a hypothetical scenario related to an exception that enables a low-income couple to retain additional income-producing assets above the standard community spouse asset allowance for a married couple.  
– *Cathryn D. Reher*

2:30 – 2:45 p.m.  
BREAK

2:45 – 3:45 p.m.  
**Small Group Session B**

201  
**What Counts and What Doesn’t: Medical Assistance Eligibility for Minnesota Medical Assistance Long-Term Care and the Elderly Waiver**  
A comprehensive overview of the financial and non-financial eligibility requirements for Minnesota Medical Assistance Long-Term Care (MA-LTC) and the Elderly Waiver (EW). The session covers current categorical eligibility standards, income budgets, and key non-financial requirements that impact approval and ongoing eligibility. Attendees will gain practical insight into how eligibility rules are applied in real cases, including common issues that delay or derail approval. The session is designed to help attorneys identify eligibility concerns early and work more effectively with clients and support staff throughout the Medical Assistance process.  
– *Martha Amdahl*

202  
**Advanced Annuity Planning in Medical Assistance Cases: Compliance Rules, Strategic Uses, and Common Pitfalls**  
Annuities are frequently used in Medical Assistance planning, but missteps in structure, ownership, or payout can result in ineligibility, penalties, or unintended tax and estate recovery consequences. This advanced session examines annuity strategies through the lens of federal Medicaid law and Minnesota state law. The session will cover permissible uses of annuities funded with countable assets, including spousal annuities, IRA-based annuity strategies, and the use of annuities to help pay through a period of ineligibility after a gift. The presenter will do a deep dive into considerations when structuring an irrevocable annuity contract and provide practical guidance for integrating annuities into broader Medical Assistance, tax, and estate planning frameworks. This session is designed for attorneys who work in Medical Assistance planning and who want deeper insight into compliant, defensible annuity strategies in complex cases.  
– *Aaron Kempen*

3:45 – 4:00 p.m.  
BREAK

4:00 – 5:00 p.m.  
**Small Group Session C**

301  
**From Excess to Eligible: Asset Planning for Minnesota Medical Assistance**  
Understand how assets are counted for Minnesota Medical Assistance (MA) and learn how transfers, gifting to family and friends, and other financial strategies can impact eligibility. This session covers countable versus excluded assets, timing considerations, and common pitfalls that can delay or jeopardize MA approval. Attorneys will gain practical guidance for advising clients on legally compliant asset planning, including strategies to reduce excess assets while maintaining eligibility, and tips for documenting transactions to withstand agency scrutiny.  
– *Kate R. Fredrickson*

302  
**In Marriage QDRO®: Using QDROs and LLCs for Better Asset Treatment**  
An In Marriage QDRO® allows Medicaid Applicant to transfer funds from an ERISA governed retirement account to a spouse and is not subject to the look-back period. Don’t have an ERISA plan? Consider using a unique process involving an LLC and Solo 401k to achieve the same result. Through practical examples and common pitfalls, this program will equip attorneys to better advise clients to save pension, 401k and IRA funds when determining eligibility for Medical Assistance and long-term care benefits.  
– *Marcus T. Foote*

5:00 – 5:30 p.m.

**Institute Reception**  
Cheers! Join the speakers, your colleagues and friends for refreshments, great conversation and networking at the Annual Medical Assistance Conference Reception.



# Faculty

**Lauren L. Fink**  
*Course Co-Chair*  
Everbright Legacy Law  
Richfield

**Brenna M. Galvin**  
*Course Co-Chair*  
Bravura Group Law & Fiduciary  
Minnetonka

**Martha Amdahl**  
Northwoods Law Group, P.A.  
Minneapolis

**Eric M. Carlson**  
Justice in Aging  
Los Angeles, California

**Marcus T. Foote**  
Kuehne & Foote, APLC  
Baton Rouge, Louisiana

**Kate R. Fredrickson**  
Barna, Guzy & Steffen, Ltd.  
Coon Rapids

**Cassie J. Iverson**  
Everbright Legacy Law  
Richfield

**Benjamin T. Kaufman**  
Hennepin County Adult  
Representation Services  
Minneapolis

**Aaron Kempen**  
Krause Financial  
De Pere, Wisconsin

**Mary Frances Price**  
Bravura Group Law & Fiduciary  
Minnetonka

**Cathryn D. Reher**  
Barna, Guzy & Steffen, Ltd.  
Coon Rapids

**Suzanne M. Scheller**  
Scheller Legal Solutions, LLC  
Champlin

**J. Noble Simpson**  
Everbright Legacy Law  
Richfield