

Outline

8:00 **Registration, Sign-In, & Course Materials (Morning Coffee & Tea)**

8:30 **GUARDIANSHIP ISSUES**

Heather Poster

- Guardianship of the Person, Estate & Conservatorship .75 ethics
- Circumstances Where Guardianship/Conservatorship is Needed
- Protective Placement

ADVANCE DIRECTIVES

- Durable Financial Power of Attorney
- Agent's Fiduciary Obligations under POA
- Health Care Power of Attorney
- Living Wills

10:00 **Break**

10:15 **ELDER ABUSE, NEGLECT AND EXPLOITATION**

Carol Wessels

.75 ethics

- Wisconsin Law: Abuse, Neglect, & Exploitation
- Protective Placement (and comparison with Chapter 51 commitment)
- Mandatory Reporting

11:45 **Lunch (on your own)**

12:45 **MEDICAID PAYMENT FOR LONG-TERM CARE**

Margaret Hickey

- Care at Home & Facilities
- What About Assisted Living Facilities?
- Basic Eligibility Rules: Individuals & Couples
- Treatment of Certain Assets: Home, Annuities, Trusts
- Gifts: Transfer of Assets Rule
- Applications, Fair Hearings, Court Reviews

MEDICAID: NEW DEVELOPMENTS

- What Rules has Congress Changed?
- Spousal Rights: Income & Assets
- What is Spousal Refusal?
- Estate Recovery

2:45 **Break**


3:00 **Evaluations, Adjournment, & Certificates**

Objectives

- Communicate the powers and duties of a guardian.
- Evaluate the various advance directives and their applications.
- Assess Wisconsin abuse definitions, including self-neglect.

- Recap criteria for Wisconsin Medicaid eligibility.
- Articulate recent updates in Medicaid.
- Recommend options when discussing veteran's benefits.





Applications of the Adult Attachment Interview

DR. DAN SIEGEL

1.5 CE HOUR

HURRY OFFER EXPIRES

October 15, 2017

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WISCONSIN ELDERLAW 2017

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1.5 CE
HOURS
ETHICS

BROOKFIELD, WI
November 17, 2017



1.5 CE
HOURS
ETHICS

BROOKFIELD, WI
Friday, November 17, 2017



WISCONSIN ELDERLAW 2017

• LEGAL • FINANCIAL • MEDICAID TODAY

- Guardianship
- Advance Directives
- Elder Abuse, Exploitation & Neglect
- Medicaid Coverage for Long-Term Care
- Medicaid Updates

If you provide services to geriatric populations, your organization faces a legal and regulatory maze. In order to understand the needs and concerns of patients and their families, and to provide appropriate services and referrals, you are expected to have a thorough understanding of common and complex issues related to advance directives, guardianship, elder abuse and exploitation, Medicaid eligibility, Veteran's Aid and Attendance, new developments – and more.



Ms. Wessels, Ms. Poster, Mr. Duff, and Ms. Hickey will provide current information that is crucial to understanding the legal and financial issues which impact the everyday aspects of providing health care services. You will leave this seminar with more confidence in care planning and case management of your geriatric patients.

Speakers

MARGARET W. HICKEY, JD, a shareholder for over 25 years in the law firm of Becker, Hickey, & Poster, S.C., in Milwaukee, practices family and elder law. She received her BA from Marquette University (*summa cum laude*, Phi Beta Kappa) and her JD from the University of Wisconsin Law School (*cum laude*). Ms. Hickey has served on the Milwaukee Bar Association Board of Directors (president, 2004-05), is past chair of the State Bar Elder Law and Family Law Section boards, and is a member of the State Board of Governors (chair 2006-07, Treasurer 2009-11). She also serves on the Legal Aid Society of Milwaukee and WUWM boards.

Ms. Hickey is a member of: American Bar Association, State Bar of Wisconsin, Milwaukee Bar Association, National Academy of Elder Law Attorneys, Waukesha Bar Association, and the Association for Women Lawyers. She is an ABA fellow and American Academy of Matrimonial Lawyers. She is named in the Best Lawyers in America for family and elder law, and is also named as a "Super Lawyer" in elder law. In 2012, she was named in the top ten lawyers in Wisconsin by Super Lawyers. She was recognized as "Woman in the Law 2011."

Speaker Disclosure:

Financial: Margaret W. Hickey is a shareholder of Becker, Hickey, & Poster, S.C. She receives a speaking honorarium from PESI, Inc.

Non-financial: Margaret W. Hickey is a member of the American Bar Association; State Bar of Wisconsin; Milwaukee Bar Association; National Academy of Elder Law Attorneys; Waukesha Bar Association; and the Association for Women Lawyers.

CAROL WESSELS, JD, is the owner of Wessels Law Office LLC in Mequon. She has been practicing elder law over 25 years. Her areas of practice include Medicaid planning, special needs trusts, advance directives and powers of attorney, psychiatric advance directives, guardianship and probate. Ms. Wessels represents victims of elder abuse in court cases to recover money or property and handles contested litigation cases including guardianship issues, conflicts with nursing homes over a loved one's care or treatment, and appeals and fair hearings in Medicaid and Family Care cases.

Before opening her firm, she was a shareholder in Nelson Irvings & Wessels SC, and served as the director of the SeniorLAW program at Legal Action of Wisconsin in Milwaukee. She was also a staff attorney at the Elder Law Center of the Coalition of Wisconsin Aging Groups.

She is a member of the National Academy of Elder Law Attorneys (NAELA) and is a past chair of the Wisconsin NAELA Chapter Board of Directors. Ms. Wessels is also past chair of the board of directors of the State Bar of Wisconsin's Elder Law Section. She was selected by Best Lawyers™ as the 2014 Best Elder Law Attorney – Milwaukee area, and was selected as among the Top 50 lawyers and Top 25 women lawyers in Wisconsin. Ms. Wessels is on the board of directors of the Southeastern Wisconsin Chapter of the Alzheimer's Association, and encourages anyone who has read this far to read something much more important, the annual Alzheimer's Facts and Figures report: <http://www.alz.org/facts/>.

Speaker Disclosure:

Financial: Carol J. Wessels is the owner of Wessels Law Office LLC. She receives a speaking honorarium from PESI, Inc.

Non-financial: Carol J. Wessels is a member of the National Academy of Elder Law Attorneys (NAELA).

HEATHER B. POSTER, JD, is a shareholder with the law firm of Becker, Hickey, & Poster, S.C., in Milwaukee, and practices family law, estate planning, elder law (including trusts for the disabled), Title 19 planning, and guardianship. She received her BA in Behavioral Science from the University of Wisconsin (with distinction) and her JD from Marquette Law School. Ms. Poster is a member of the State Bar of Wisconsin's Elder Law Section Board (chair elect) and the Wisconsin Chapter of the National Academy of Elder Law Attorneys. She was the past chair and long-time board member for WisPACT, Inc., the non-profit organization that oversees pooled and community trusts for the elderly and disabled.

Ms. Poster is also a co-editor of the Medicaid Divestment Chapter of the Attorney's Desk Reference, and the Medicaid Chapter of: *Advising Older Clients and Their Families*, both published by the State Bar of Wisconsin. She has been recognized for her work in elder law by Super Lawyers Magazine and is listed in the Best Lawyers Publication.

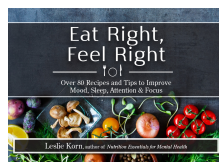
Ms. Poster is a member of the State Bar of Wisconsin, the Milwaukee Bar Association, the Association for Women Lawyers, and the National Academy of Elder Law Attorneys. She lectures extensively on Title 19 (Medicaid) planning for the disabled and elderly, special needs and pooled trusts, and guardianship.

Speaker Disclosure:

Financial: Heather B. Poster is a shareholder of Becker, Hickey, & Poster, S.C. She receives a speaking honorarium from PESI, Inc.

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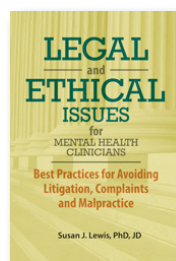


Eat Right, Feel Right:

Over 80 Recipes and Tips to Improve Mood, Sleep, Attention & Focus

By Leslie Korn, PhD, MPH, LMHC

Improve mood, sleep and focus with these nutrient-rich recipes and handy tips. Eat Right, Feel Right teaches you the do's and don'ts of using ingredients in entrees, snacks, soups, smoothies and dressings to make you an at-home mental health chef.



Legal and Ethical Issues for Mental Health Clinicians

Best Practices for Avoiding Litigation, Complaints and Malpractice

By Susan J. Lewis, Ph.D., J.D.

This go-to resource goes beyond the what and why, focusing on how to protect you and your clients in an increasingly litigious society. Presented in easy-to-understand language to step you through the legalese, highlighted by 30 engaging case examples to illustrate how you can overcome legal and ethical challenges that arise in your practice. Topics include risk management, contracts, HIPA, privileged communication, licensing complaints, supervision pitfalls, rights of minors and technology.

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If your profession is not listed, please contact your licensing board to determine your continuing education requirements and check for reciprocal approval. For other credit inquiries not specified below, or questions on home study credit availability, please contact cepsi@pesi.com or 800-844-8260 before the event.

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WISCONSIN COUNSELORS: This intermediate activity is approved for 5.0 clock hours of continuing education instruction. The State of Wisconsin Department of Regulation and Licensing recognizes courses and providers that are approved by the American Psychological Association, ASWB or NAADAC. A certificate of attendance will be awarded at the end of the program to counselors who complete the program evaluation, to submit to their state board.

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This activity qualifies for 5.0 contact hours.

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OTHER PROFESSIONS: This activity qualifies for 285 minutes of instructional content as required by many national, state and local licensing boards and professional organizations. Save your course outline and certificate of completion, and contact your own board or organization for specific requirements.

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