

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

- Wisconsin Law: Abuse, Neglect, & Exploitation .75 ethics
- 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

2:45 **Break**

3:00 **MEDICAID: NEW DEVELOPMENTS**

- What Rules Has Congress Changed?
- Spousal Rights: Income & Assets
- Marital Property Rules and How They Affect Benefits
- Expanding Spouse's Rights to Income and Assets
- Estate Recovery

4:00 **Adjournment**

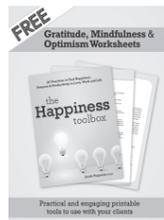
Objectives

- 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.
- Explain marital property rules and how they affect Medicaid benefits.

Target Audience:

Social Workers • Nursing Home Administrators • Nurses • Counselors • Admissions • Directors Case Managers
Discharge Planners • Health Care Facilities • Financial/Business Office Managers • Patient Care Coordinators • Psychologists

— FREE —
Worksheets



Free Gratitude, Mindfulness
& Optimism Worksheets

pesi.com/worksheetshappiness

Bring any Training On-Site!

- Cost Effective for Groups
- Customizable
- Flexible

CE
credits
included!

www.pesi.com/inhouse

NON-PROFIT ORG
US POSTAGE PAID
EAU CLAIRE, WI
PERMIT NO 32729

PESI, Inc.
P.O. Box 1000
Eau Claire, WI 54702-1000
A Division of PESI, Inc.

WISCONSIN ELDERLAW 2019

...taught by Wisconsin Experts!

**1.5 CE
HOURS
ETHICS**

BROOKFIELD, WI
November 22, 2019



Register now! pesi.com/express/75247

WISCONSIN ELDERLAW 2019

LEGAL • FINANCIAL • MEDICAID TODAY

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

**1.5 CE
HOURS
ETHICS**

BROOKFIELD, WI
Friday, November 22, 2019



Register now! pesi.com/express/75247

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, new developments – and more.



Ms. Wessels, Ms. Poster, 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, practices in the areas of divorce, family law, and elder law including trusts for the disabled, Title 19 and guardianship. She is a shareholder in the law firm of Becker, Hickey & Poster, S.C., Milwaukee. She served as Chair of the Family Law and Elder Law Section Boards of Directors and is currently a member of both Boards. Margaret is a past president of the Milwaukee Bar Association (2004-05) and served on the Board of Directors from 1999-2005. She served on the State Bar of Wisconsin Board of Governors (District 2, 2005-2015, Chair 2006-07, Treasurer 2009-11) and on the Board of Directors of the Legal Aid Society and public radio station WUWM. Margaret lectures frequently on elder law and family law at local, state and national bar meetings and to community groups and other professionals.

Margaret is a member of the American Bar Association, the State Bar of Wisconsin, the Milwaukee Bar Association, the Waukesha Bar Association, the National Academy of Elder Law Attorneys, the Association for Women Lawyers and is a Fellow of the American Bar Foundation and the American Academy of Matrimonial Lawyers (president for the Wisconsin Chapter, 2005-06.) She is named in the Best Lawyers in America for family and elder law. Margaret has been named as a "Super Lawyer," as one of the top 10 lawyers in the State of Wisconsin in 2012, as one of the top 25 women lawyers in the state, and a superlawyer in elder law in past issues and as a "Woman in the Law 2011." She is also a member of the American College of Family Trial Lawyers.

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, has been practicing elder and special needs law for over 28 years. She is an owner of Wessels & Liebau, LLC in Mequon, Wisconsin. Her cases range from traditional estate planning and Medicaid planning to complex litigation. Carol initially learned about the need for legal services to victims of elder abuse when she obtained the first statewide grant in Wisconsin to provide legal services to victims of elder abuse, as the Director of the SeniorLAW program at Legal Action of Wisconsin. She went into private practice in 2004.

Carol is on the Board of Directors of the National Academy of Elder Law Attorneys (NAELA), and a past Board Chair of the Wisconsin Chapter of NAELA and the Elder Law Section of the State Bar of Wisconsin. She has been recognized as a 2013 Leader in the Law by the Wisconsin Law Journal, as the "Best Elder Law Attorney in Milwaukee" in 2014 by Best Lawyers, and as a SuperLawyer for over 10 years. She is a fellow of the Wisconsin Law Foundation.

Outside her practice, Ms. Wessels spends her time as a warrior in the fight to end Alzheimer's through her work on the Board of Directors of the Alzheimer's Association Wisconsin Chapter, where she currently serves as the chair of the Public Policy Committee and acts as an Ambassador to Senator Tammy Baldwin.

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 and Poster, S.C., in Milwaukee, Wisconsin. Her practice focuses on the representation of the elderly and disabled in matters such as family law, estate planning, public benefits and advanced directives/guardianship. Heather also gives advice and consult to courts and trust administrators on special needs and pooled trusts. She is a board member and chair elect of the Wisconsin Chapter of the National Academy of Elder Law Attorneys' Board of Directors. Heather is an advisor to and the past Chair of the State Bar of Wisconsin's Elder Law and Special Needs Section Board. She serves as a Board member for WisPACT, Inc., the non-profit organization that oversees pooled and community trusts for the elderly and disabled.

Heather is 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. Heather lectures extensively at state, national and international conferences on public benefits and long term care planning for the disabled and elderly, special needs and pooled trusts, guardianship and capacity issues. 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.

Speaker Disclosure:

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

Questions? Call Customer Service: 800-844-8260

Have a seminar idea? A manuscript to publish? The nation's top speakers and authors contact us first. If you are interested in becoming a speaker, or have a new topic idea, please contact **Cyndi Postlewaite** at cpostlewaite@pesi.com or call (715) 855-5253.

SAVE BY INCLUDING THESE PRODUCTS WITH SEMINAR REGISTRATION!

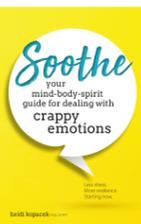


Digital Detox Card Deck

56 Practices to Help You Detox, De-Stress, Distract and Discover

By Goali Saedi Bocci, PhD

Buzzing, pinging and grasping for our attention, our phones and screens can cause significant distress, as we lose touch with reality and the importance of self-care and emotional well-being. Take advantage of the 56 practices inside to detox from your devices, feel rejuvenated, find healthier coping skills, and embrace the present moment.



Soothe

Your Mind-Body-Spirit Guide for Dealing with Crappy Emotions

By Heidi Kopacek

In *Soothe: Your Mind-Body-Spirit Guide for Dealing with Crappy Emotions*, clinical psychologist and basically your new best friend, Dr. Heidi Kopacek, gives you a holistic approach to de-frazzling from 21st century stress and negativity.

Live Seminar Schedule

8:00 Registration/Morning Coffee & Tea

8:30 Program begins

11:45-12:45 Lunch (*on your own*)

4:00 Program ends

There will be two 15-min breaks (mid-morning & mid-afternoon).
Actual lunch and break start times are at the discretion of the speaker.
A more detailed schedule is available upon request.



Hassle-Free Cancellation Policy:

If you contact us before the event date, you can exchange for a certificate to attend another seminar, or receive a tuition refund less a \$30 cancel fee. Substitutions are permitted at any time.



PESI Inc. is proud to offer this seminar (at these locations only) free of charge (on live seminar tuition) for veterans and active duty military personnel. **Limited seats available; advance online registration required.**

Live Seminar Continuing Education Credit Information

Credits listed below are for full attendance at the live event only. After attendance has been verified, pre-registered attendees will receive an email from PESI Customer Service with the subject line, "Evaluation and Certificate" within one week. This email will contain a link to complete the seminar evaluation and allow attendees to print, email or download a certificate of completion if in full attendance. For those in partial attendance (arrived late or left early), a letter of attendance is available through that link and an adjusted certificate of completion reflecting partial credit will be issued within 30 days (if your board allows). Please see "LIVE SEMINAR SCHEDULE" on this brochure for full attendance start and end times. NOTE: Boards do not allow credit for breaks or lunch.

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.

Materials that are included in this course may include interventions and modalities that are beyond the authorized practice of mental health professionals. As a licensed professional, you are responsible for reviewing the scope of practice, including activities that are defined in law as beyond the boundaries of practice in accordance with and in compliance with your profession's standards.

PESI, Inc. offers continuing education programs and products under the brand names PESI, PESI Healthcare, PESI Rehab and Psychotherapy Networker.

Ethics: This seminar includes 1.5 hours of state specific ethics instruction. If ethics is not specified within your licensing board's approval statement below, please contact your board to determine the applicability and amount of ethics allowed.

Counselors: This intermediate activity consists of 6.0 clock hours of continuing education instruction. Credit requirements and approvals vary per state board regulations. Please save the course outline, the certificate of completion you receive from the activity and contact your state board or organization to determine specific filing requirements.

Wisconsin Counselors: This intermediate activity consists of 6.0 clock hours of continuing education instruction. Credit requirements and approvals vary per state board regulations. Please contact your licensing board to determine if they accept programs or providers approved by other national or state licensing boards. A certificate of attendance will be awarded at the end of the program to participants who are in full attendance and who complete the program evaluation.

Nurses, Nurse Practitioners, and Clinical Nurse Specialists: PESI, Inc. is accredited as a provider of continuing nursing education by the American Nurses Credentialing Center's Commission on Accreditation.

Nurses in full attendance will earn 6.0 contact hours. Partial contact hours will be awarded for partial attendance.

Nursing Home Administrators: This program has been submitted (but not yet approved) for 6.0 continuing education clock hours and 6.0 participant hours from NAB/NCERS. For the most up-to-date credit information, please go to: www.pesi.com/events/detail/75247.

Psychologists: This activity consists of 6.0 clock hours of continuing education instruction. The following state psychologist boards recognize activities sponsored by PESI, Inc. as an approved ACCME provider: Alaska, Arkansas, California, Colorado, Georgia, Illinois, Indiana, Kentucky, Maine, Maryland, Missouri, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, Oklahoma, Pennsylvania, South Carolina and Wisconsin. Certificates of attendance will be issued for you to submit to your state licensing board to recognize for continuing education credit.

PESI, Inc. is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians. PESI, Inc. designates this live activity for a maximum of 6.0 AMA PRA Category 1 Credit(s)™. Physicians should only claim credit commensurate with the extent of their participation in the activity.

Social Workers: PESI, Inc., #1062, is approved to offer social work continuing education by the Association of Social Work Boards (ASWB) Approved Continuing Education (ACE) program. Organizations, not individual courses, are approved as ACE providers. State and provincial regulatory boards have the final authority to determine whether an individual course may be accepted for continuing education credit. PESI, Inc. maintains responsibility for this course. ACE provider approval period: January 27, 2017 - January 27, 2020. Social Workers completing this course receive 4.5 Clinical Practice and 1.5 Ethics continuing education credits. No more than 6 total CE hours may be awarded for this activity. Course Level: Intermediate. Full attendance is required; no partial credits will be offered for partial attendance. A certificate of attendance will be awarded at the end of the program to social workers who complete the program evaluation.

Other Professions: This activity qualifies for 360 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.



SCAN HERE
FOR A SPECIAL OFFER ON
BOOKS & CARD DECKS

How to Register: WISCONSIN ELDERLAW 2019

QUESTIONS? Call 800-844-8260 or e-mail us at info@pesi.com.

ONLINE

www.pesi.com/express/75247

PHONE

800-844-8260

Please have credit card available

FAX

800-554-9775

MAIL

PESI, Inc
P.O. Box 1000
Eau Claire, WI
54702

1 Please complete entire form (to notify you of seminar changes):
please print; staple duplicate forms.

Mail Code: _____

See mail code box on address panel on reverse side

Name _____ Profession _____

Employer Name _____

Employer Address _____

Dept/Floor/Suite _____

City _____ County _____

State _____ Zip _____

Home/Cell Ph () _____

Dept. Ph () _____

E-mail address _____

*Registrant's e-mail is required to receive your certificate of completion and registration confirmation.

2 Check location: (*make copy of locations*)

BROOKFIELD, WI
November 22, 2019 [75247BRO]
Sheraton Milwaukee-Brookfield
375 S Moorland Rd • 53005
(262) 364-1100

3 Check tuition:

TUITION WITH SEMINAR MANUAL

\$219.99 – choose one of the options below:

- per person for 2 or more preregistering together —OR—
- single registration postmarked 3 weeks prior to seminar date
- \$249.99** standard

ADD-ON PRODUCTS

Distributed at seminar—FREE SHIPPING!

- \$17.99*** *Digital Detox Card Deck*
- \$16.99*** *Soothe* book

*Attendees add applicable state and local taxes except in AK, DE, MT, NH, OR

4 Indicate method of payment:

ALL REGISTRATIONS MUST BE PREPAID.
Purchase orders welcome (attach copy).

Check enclosed payable to **PESI, Inc.**

MC VISA AE Discover Novus
16 digits 13-16 digits 15 digits 16 digits

Card # _____

Card Exp. _____ V-Code #: _____

Signature _____

(*MC/VISA/Discover: last 3-digit # on signature panel on back of card.)

(*American Express: 4-digit # above account # on face of card.)

CAN'T ATTEND THE SEMINAR?
See below for individual product orders

___ **Digital Detox Card Deck*** \$17.99 (PUB086030)
___ **Sooth** book* \$16.99 (PUB086050)

CE hours and approvals on products may differ from live CE approvals.	Product total \$ _____
*Shipping is \$6.95 first item + \$2.00 each add'l item.	*Shipping Subtotal _____
**Residents add applicable state and local taxes except in AK, DE, MT, NH, OR	**Tax _____
	TOTAL _____



FOR OFFICE USE ONLY
Fed ID # 26-3896894 © 2019 PESI, Inc.

CP

PLEASE RETURN ENTIRE REGISTRATION FORM

Register now: pesi.com/express/75247