Elder Law – Fall CLE

ORIGINAL PROGRAM DATE
September 13, 2024

AVAILABLE MEDIA TYPES
Video & Audio MP3

Presented in partnership with the WSBA Elder Law Section

REPORTING YOUR CREDIT

This on-demand seminar was originally presented as a live webcast on September 13, 2024, in Seattle, WA. If you attended the live webcast and reported CLE credits, you cannot also report credits from watching or listening to this recording if repeated within your three year reporting period.

DESCRIPTION

In this on-demand CLE hear from colleagues presenting on critical topics for Elder law practitioners including probate, Medicaid, AI, using fiduciaries and estate planning. We are also happy to welcome Paul Getzel, the Executive Director of the National Alliance on Mental Health (NAMI). He is nearly two years in to this new role and will provide an update.

AGENDA

1 **Navigating Ownership Transitions: What Happens to an Entity When the Owner Passes Away?**
We'll explore the complexities of estate planning when the decedent owns an LLC or a corporation. We'll dive into scenarios such as: The operating agreement stipulates that the decedent's interest transfers to their lineal descendants; The agreement requires the company purchase the decedent's interest; Dissolving or selling an entity; What if there isn't any operating agreement at all? Additionally, we'll examine the implications of the Corporate Transparency Act on these situations.
Michael Kvistad – Beresford Booth, Edmonds, WA

2 **Compliance with the POMS: Advising the Lay Trustee of a Special Needs Trust**
There are certain considerations involved with special needs trusts. This session focuses on the regulations in the POMS (Program Operations Manual System) that govern special needs trusts.
William S. Hickman – Hickman Menashe, P.S., Lynnwood, WA

3 **De-escalation Techniques**
Basic techniques developed in clinical settings are applicable to be used in the community in order to help someone in crisis achieve a calmer state, set up lines of communication and empathy, and get to the root of someone's needs. These techniques are applicable in any environment to reduce disruptions and disturbances, develop skills in developing rapport and relationships with individuals in crisis, or simply overcome with anxiety and other distressing emotions to find emotional regulation and maintain access to services. This session also speaks to the self-care and emotional regulation needs of the employee or volunteer or staff that is assisting someone in crisis.
Paul Getzel - National Alliance on Mental Illness, Seattle, WA

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4 Generative AI: Reshaping the Practice of Law

Hear from two authorities in the field on AI's impact on law practice; how you can best implement it and things to be cautious of.

Bradford Gandt – LexisNexis, Seattle, WA
Carol Kuczora Antonin – LexisNexis, Seattle, WA

5 Stories from the Frontline – Estate Plans in Action from the Perspective of a Professional Fiduciary

Do you want to draft plans that work for your client? Amy Egtvet and WE Trust Company have executed hundreds of estate plans over the last 27 years and know the pitfalls of plans that look great on paper but run the risk of backfiring when implemented. Hear stories from Amy's years on the frontline and learn what works and what doesn't. And, what can you do as an advisor to help create a smooth, efficient plan for your clients.

Amy Egtvet – WE Trust Company, Seattle, WA