Your Success. Our Commitment.

ELDERCOUNSEL®

Excellence in Elder Law and Special Needs

Special Needs Planning Immersion Camp

February 28-March 01, 2018

Hilton Garden Inn Austin Downtown/Convention Center – Austin, TX

Prior to the Camp

- Watch The Foundations of Public Benefits
- **Pre-Camp Fundamentals call** – Monday, February 12, 1:00 p.m. – 2:00 p.m. CT

Day 1 – Wednesday, February 28, 8:30 a.m. – 5:30 p.m. CT

8:00 a.m.
Breakfast (provided)

8:30 a.m.
Welcome and Overview
Understanding What It Means to Have a Special Needs Planning Practice

9:00 a.m.
A Brief Review of Public Benefits
Attendees will be provided with materials on the basics of public benefits prior to the Immersion Camp. This session will go through a number of scenario's applying what was learned to common scenarios special needs trust planners often encounter.

9:30 a.m.
Special Needs Trust Basics
An examination of the basics of First-Party and Third-Party Trusts including reviewing key laws, regulations and POMS.

10:00 a.m.
Break

10:15 a.m.
A Closer Look: First Party Special Needs Trusts
This segment will discuss how and when to use a First Party Special Needs Trust as well as working with referral sources and advisors to meet the needs of the beneficiary.

11:30 a.m.
Special Needs Trust Planning and Family Law
Using both First Party and Third Party Special Needs Trusts as a tool to maximize child and spousal support are an expanding area of practice. This segment will review the rules as well as tips of how to with Family Law Practitioners.

12:00 p.m.
Lunch (on own)

1:00 p.m.
A Closer Look: Third Party Special Needs Trust
This section will take a closer look at Third Party Special Needs Trusts with a focus on common planning and drafting scenarios.

2:30 p.m.
Choosing the Right Management Team
A review of management models, working with corporate, private professional fiduciaries, pooled trusts and care manager to ensure the trust will be administered correctly.

3:30 p.m.
Break

3:45 p.m.
Team Planning Using Distribution Plans
How to use distribution plans to avoid problems in administration of special needs trusts and coordinate the activities of the management team.

4:15 p.m.
Third Party Trusts and Housing
The residential needs of beneficiary of special needs trusts are often the greatest issues that families face. This section will review different options to meet that need as well as how to minimize the loss of benefits if the beneficiary is receiving SSI.

5:00 p.m.
Third Party Trust Tax Treatment
Special Needs Trusts can be a valuable tax planning tool. We will review the basics of taxation of special needs trusts including utilization of qualified plans. Attendees will also learn how to work with tax professionals to harness the power of a special needs trust as a tax planning tool and increase referrals.

5:45 p.m.
Reception at 18th Over Austin

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Day 2 – Thursday, March 1, 8:30 a.m. – 12:00 p.m. CT

8:00 a.m.
Breakfast (provided)

8:30 a.m.
Using Pooled Trusts into your Practice
Working with Pooled Trusts can be a valuable partnership to serve your clients and referral sources, as well as working with benefit recipients that are over the age of 65.

9:30 a.m.
Medicare Set-aside Arrangements
This segment will go through the basics of Medicare Set-aside Arrangements and how to use the ElderCounsel MSA Trust.

10:00 a.m.
Break

10:15 a.m.
Methods of Distributions
This segment will focus on how to make distributions to beneficiaries including paying for needs directly, using credit cards, True Link Cards, and ABLE Accounts.

10:45 a.m.
Building Your Special Needs Planning Practice
The final segment of this Immersion Camp will concentrate on how to build a Special Needs Planning Practice in your community. We will look at common sources of referrals for both First Party and Third-Party trusts.

12:00 p.m.
Adjourn