SYMPOSIUM
2016 NORTHERN VA | WASHINGTON DC

Keynote

How to Have Better Conversations
Celeste Headlee
Based on nearly 20 years of experience talking to presidents, celebrities, school teachers, and carpenters, Celeste has ten practical, achievable methods for having better conversations.

The Future of Technology in Your Practice
Daniel Martin Katz, JD
Dr. Katz' keynote presentation will highlight a variety of innovations directed toward the provision of more efficient and higher quality legal services. This session will explore how you might deploy such approaches in your practice.

Elder Law

Elder Law and Special Needs Planning Update
Howie Krooks, JD, Vincent Russo, JD, & Michael Amoruso, JD
This session will cover the many changes in the area of elder law, Medicaid planning, and Special Needs Planning in the last year, and what changes are to come.

Treasure Hunting in a California Kindergarten
Marty Burbank, JD
Hear how ElderCounsel member Marty Burbank and his wife made the decision to pay it forward by investing in the lives of 27 kindergartners.

The Trust Has Been Signed - Now What?
Melissa Crump, JD
This session will explore advising the trustee, handling lifetime administration issues, and dealing with problems that arise during administration of the trust.

A Tale of 2 (or More) Solutions: VA Pension Planning
Dawn Weekly, JD & Angela Manz, JD
This interactive session features two experienced VA pension planners who have analyzed the same set of facts, but have different solutions.

A Tale of 2 (or More) Solutions: Medicaid Planning
Patrick Smith, JD & Miles Hurley, JD
Our experienced Medicaid planning presenters will analyze the same set of facts, but provide different solutions to those facts.

The Power of the Mind
Lynn Fernandes
This session will explore the science behind mindfulness and teach you ways to bring this into your everyday life.

Can We Prevent America's Most Feared Disease?
Max Lugavere
In this session you'll learn how to minimize your risk for Alzheimer's and other neurodegenerative diseases.

Elder Law (continued)

Your Future Elder Law Practice: How Will Outside Influences Change the Way You Practice?
Lou Pierro, JD
This session will look forward to the effect the government, and technology, may have on an elder law practice and what attorneys can (and should) do now to successfully adapt.

Representing the Incapacitated Client
Todd Whatley, JD
This session will discuss the ethical rules that come into place when dealing with an incapacitated client or one with diminished mental capacity.

Hot Topics in Special Needs Planning
Michele Fuller, JD
This session will explore hot topics in special needs planning that every attorney practicing in this area should be aware of.

Filial Responsibility: Growing Trend or Outdated Law?
Wade Scott, JD
This session will explore how filial responsibility may change the way we advise our elder law clients, including a look at what states currently have these laws.

Crucial Conversations With Clients, Part 1: The Impact of Illness on Family Relationships
Todd Whatley, JD, Angela Manz, JD, & Peggy Hoyt, JD
This unique session will provide ways to introduce sensitive topics in a respectful way, from both the attorney's side and with input from a family therapist.

Crucial Conversations With Clients, Part 2: Family Issues That Impact Elder Law Planning
Todd Whatley, JD, Angela Manz, JD, & Peggy Hoyt, JD
This session will focus on how to address sensitive issues involving a client's family.

Trusts & Estates

Trusts and Estates Plenary Session (Asset Protection and Self-Settled Trusts)
Gideon Rothschild, JD
An examination of various asset protection techniques including SLATs, DAPTs, and hybrid approaches.

Case Studies in "Routine" Asset Protection Planning
Jonathan Mintz, JD
Learn the practical side of designing an asset protection structure for a client.

Advanced Planning After New 2704 Regs
Bob Keebler, CPA, MST, AEP (Distinguished) & Carl Waldman, JD
The Proposed Sec. 2704 regulations might permanently end the use of popular estate planning techniques which reduce the value of assets for transfer tax purposes. This session will discuss the impact of these regulations and what tools you can start using today.

Trusts & Estates (continued)

Practical Asset Protection with Wealth Docx®

Tom Ray, JD

This session will discuss and demonstrate the practical application of asset protection techniques using Wealth Docx.

The Bespoke Trust Protector

Matt McClintock, JD

This session will discuss the concepts and law around protectors, drafting considerations in Wealth Docx®, and the actual use of protectors when necessary.

Thriving in Estate Planning (Part 1)

Bill Conway, JD & Stan Miller, JD

A clearly defined process and roadmap that attorneys and advisors can forge together and build indispensable partnerships, producing measurable economic benefit while providing the best possible planning for their clients.

Thriving in Estate Planning (Part 2)

Bill Conway, JD & Stan Miller, JD

A deeper dive into thriving as an attorney by developing relationships and best practices with advisors and clients.

November and Beyond... Challenges and Opportunities Under the Tax Policies of the Next President

David Cahoone, JD & Matt McClintock, JD

We'll cover how to counsel your clients to minimize risk and maximize opportunities and take specific actions based upon the possible November election results.

Gun Law Legal Update: Critical Issues and Drafting Solutions

Dennis Brislawn, JD

Review of federal legislation and essential cases affecting gun owners' rights and legal planning issues.

Gun Law Planning & Practice: Key Drivers in Gun Trust Planning

Dennis Brislawn, JD

This session will discuss how to engage the client on the importance of planning for their firearms.

Trust & Estate Administration (Toward Profitable Process)

Jessica Pannell, JD & Lee Mulligan, JD

Jessica will share her perspectives on her successes, challenges, and effective processes she's used to make trust administration profitable in the practice.

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Business Law

Clients with a Business: The Need for Communication between the Estate Planner and the Corporate Attorney

Frank Ciatto, JD & Jeanne Newlon, JD

This session will cover choice of entity for the closely held business and its related investments.

Legal Ethics for Lawyers Serving Fiduciaries

Bill Davis, JD

This session will focus on ethical issues facing business owners and business attorneys.

Series LLCs: Pros, Cons, and Practical Uses

Jeramie Fortenberry, LL.M

This session provides an overview of series LLCs, including the conceptual underpinnings of the series LLC form of business.

Dealing with Uncle Sam - Everyone's Least Favorite Relative in the Family Business

Sam Donaldson, JD, LL.M

This session will review the federal income tax issues and planning strategies for C corporations, S corporations, partnerships, and limited liability companies, and how they affect contemporary estate planning techniques.

Employee Stock Ownership Plans

Brian Eagle, AFA, CFA, MBA & George Cassiere, JD

Join us for an exciting presentation on utilizing Employee Stock Ownership Plans (ESOPs) in your practice to create win-win-win scenarios for your clients, their privately owned business, and their employees.

Legal Assessments: The New Tip of your Sword for your Business Law Practice

Tom Fafinski, JD

Learn how to establish new relationships with business clients by doing a complete legal "check-up."

Counseling Small Business Clients, Part I

Morris Saunders, JD

This two-part session will cover the most common legal issues encountered when representing small businesses.

Counseling Small Business Clients, Part II

Morris Saunders, JD

This two-part session will cover the most common legal issues encountered when representing small businesses.

Preserving the Veil - Helping Clients Maintain Operational Integrity in their Small Business

Neel Shah, JD

This session will discuss some of the common pitfalls, how to address them, as well as how to turn this service into a profitable client acquisition & retention tool.

Practice Development & Marketing

5 Online Marketing Strategies You May Not Be Taking Advantage Of
During this one-hour session, we'll cut through the noise and explore the top new strategies you can implement to promote yourself and your practice online.

You're Charging What?! How to Set Fees for T&E and Business Engagements
Stephen Wesolick, JD, Bill Conway, JD, Stan Miller, JD & Paul Bernstein, JD
We will discuss the best practices for fee setting and client engagement agreements, so you can close more leads, maximize your profits ethically, and make your (business) life easier.

The Practice in Transition - Succession Considerations for a Mature Practice
Aaron Ruswick, JD
The presentation will cover how to effectively transition your practice in such a way that protects the value; protects your clients; and avoids problems which often occur if there is no succession plan in place.

The Art of the Close, Part 1: Perspectives on the Initial Consultation
Scott Stewart, JD & Paul Bernstein, JD & Neel Shah, JD
During this session, we'll share methods and techniques you can use to uncover planning needs and motivate your prospects to engage your services.

The Art of the Close, Part 2: When You're Going to Close and It's Not What You Planned On
Joe Strazzeri, JD & Shelley Lightfoot
During this session, we'll share methods and techniques you can use to uncover planning needs and motivate your prospects to engage your services.

Essential Elements of Effective Client Maintenance
Vinnie Bonazzoli, JD & Jeff Matsen, JD
We will answer many of the frequently asked questions about client maintenance programs and share the must-have components to provide value to clients.

WealthCounsel, ElderCounsel Peer Group breakfast
Tom Fafinski, JD & Patrick Carlson, JD
During this discussion, you'll learn how a peer group can help your practice and how WealthCounsel's Peer Groups have helped other attorneys just like you.

The Essence of Legacy - The Art (And Power) of Capturing
Clients' Ideals In Their Planning
Martha Hartney, JD & Stan Miller, JD
Join this session to discover how you can differentiate your firm from others by becoming the "counselor at law" your clients really want.