2018 Winter Meeting Sponsoring Companies

VISIONARY LEVEL

ACHIEVA Family Trust is pleased to once again serve as a sponsor for PAELA's 2018 Annual Winter Meeting. We have 20 years of success in helping individuals with disabilities protect their government benefits through the use of special needs trusts. ACHIEVA Family Trust serves as Corporate Trustee for Pooled Trusts, Payback Trusts and Third Party Trusts. We serve more than 2,000 beneficiaries throughout Pennsylvania and manage over $100 million in trust assets. Our reasonable fees, low minimum of $500 to open a trust and vast experience in the area of social services make us an attractive option for your clients with special needs.

Amy Dolan Strano, Esq., President, Jacki Connell, Esq., Trust Attorney, and Michelle Sipple, Vice President will be present throughout the weekend's events and look forward to talking with you about how ACHIEVA Family Trust can assist you in better serving your clients. We look forward to seeing you soon at Bedford Springs!

Secured Futures is a 501(c)(3) non-profit organization formed to provide trustee, trust administration and advocacy services for the disabled, elderly, minor children and others seeking spendthrift trust protection.

Secured Futures is an approved corporate fiduciary in the Orphan's Court of both Philadelphia and Allegheny Counties. In addition to serving as trustee for (D)(4)(A) trusts in Pennsylvania, Secured Futures offers two pooled special needs trust options; a 1st party pooled trust, and a 3rd party pooled trust. A unique feature of our pooled trusts is the option for grantors of both trusts to name remainder beneficiaries upon the death of the primary beneficiary. In the 1st party trust, funds remaining upon death are subject to Medicaid payback prior to final disbursement to remainders, while funds remaining in the 3rd party trust flow directly to remainders named in the Joinder Agreement when the account was created.

Secured Futures' advantage is in our people, processes and practices – every employee is a dedicated, compassionate and competent professional that is an advocate for the beneficiaries we serve – providing exceptional and personal customer service. Secured Futures extends its commitment to serve through charitable programs that provide emergency shelter funds or recognition to those who go above and beyond in supportive roles to the beneficiaries we serve.

SAGE LEVEL

IKOR simplifies the care management process of fiduciaries by providing unique solutions for the issues of seniors and the disabled. We orchestrate all aspects of client care, because we know what they should be, providing an unbiased, independent point of view that focuses on maximizing the quality of life within the parameters of a cost-conscious and time-efficient platform.

IKOR helps seniors, those with disabilities, and their families determine what type of care is required for their quality of life based on individual circumstances, offering support and solutions with a long view perspective. The IKOR team's areas of expertise include:

- Health Care—Medical Consultation, Medication Management, and Health & Wellness Guidance
- Life Management—Preparation and Standby for future Health Care needs
- Financial Advocacy—Daily Money Management, Securing of Assets and Routine Bill Payment
- Emergency Situations—Safe Hospital Discharge, Crisis Intervention, and Return to Normalcy
- Safe Living —Modification to home for mobility or safety or Relocation to proper facility
- Age in Place or supporting Family Members living at Distance
- Support in Legal areas- as you address the address legal areas life
- Acting as Power of Attorney, or Professional Guardian and other areas
- Benefits Assistance—Addressing Insurance Concerns, Procurement, and Maintenance for Public Entitlements.

Security National Trust Company is a nationally chartered, independent trust company with over $800 million in assets. We are regulated by the Office of Comptroller of Currency (OCC) and have a limited purpose charter to offer trust and fiduciary services. What makes Security National Trust Company stand apart from other much larger national banks is our personalized approach to each client's unique needs with local decision making. Advantages include:

- Willingness to consider unique assets such as LLC's, real estate, and mineral leasing rights
- Skills to serve as court appointed financial guardian or financial power of attorney
- May partner with qualified existing investment advisor for delegated/directed trustee services
- No minimum balance requirement for trusts (low minimum annual fee)
- Experience with Special Needs Trusts
- Offer in person client meetings (no remote call center). Phone calls are promptly answered by a team member, no call trees/press# system.

We are honored to support PAELA and appreciate serving the many talented elder law attorneys we have in PA! Michael Coombe and Richard Corroon are looking forward to meeting you at the conference in Bedford! Please stop by our table!

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True Link Financial is a diversified financial services firm offering a range of money management tools, investment services, and software for trust and benefits eligibility management. We partner with trustees, fiduciaries, families, and individual consumers to protect independence and increase quality of life. Dozens of pooled trusts use True Link's restricted Visa card, pooled trust management, and investment advisory services. Our tech-enabled, user-friendly suite of services empowers pooled trusts to streamline operations and invest in increasing the quality and reach of their services. Our financial advisors act as stewards of trust finances, providing guidance, support, and a measured perspective on global markets, capital management, and long-term investing. Leveraging deep financial expertise and the best of Silicon Valley technology across all of our services, we are headquartered in San Francisco, California. Founded in 2012, we have staff located throughout the US and customers in all 50 states.

EXPERT LEVEL

Minnesota Lawyers Mutual. *Elder law attorneys have long-term relationships with their clients, and they need a dependable source of professional liability insurance for their practices over time. Minnesota Lawyers Mutual is just such a stable partner for elder law practitioners. Founded by lawyers in 1982 with one mission- to protect lawyers. MLM is owned and directed by the law firms and attorneys it insures. And we have consistently shared our success by returning dividends to our member insureds for 28 years in a row. MLM offers a secure website for policyholders that includes our online application, electronic policy delivery, and our risk management library. We invite you to visit www.mlmins.com to learn more about us.*

PCM, Inc. provides Pennsylvania attorneys with Medicaid Qualifying Annuities to help their clients qualify for Medicaid. We work with Pennsylvania attorneys to provide annuities that conform to Federal and State Medicaid laws and regulations.

PCM, Inc. has the knowledge and experience to guide you and your clients in the right direction. Matthew Parker, the President of the company, is a Certified Elder Law Attorney*. He specializes in helping his clients obtain Medicaid benefits for long-term care. He was the attorney for the community spouse in James v. Richman, the case that serves as the precedent for the use of community spouse Medicaid Qualifying Annuities in Pennsylvania.

If you are a Pennsylvania Elder Law or Estate Planning attorney whose clients may be able to benefit from the purchase of a Medicaid Qualifying Annuity, PCM is your trusted source.

The **Aging Life Care Association (ALCA),** formerly known as the National Association of Professional Geriatric Care Managers, is composed of professionals in the fields of social work, nursing, therapy, gerontology and certified care managers. Since 1985, members of ALCA have distinguished themselves in the field of aging and focus on eight core areas in order to enhance the lives of the clients they serve. The core areas include: Legal, Crisis Intervention, Health and Disability, Financial, Housing, Family, Local Resources and Advocacy. Aging Life Care Professionals approach care management holistically, and therefore, are different from Patient Advocates, Senior Advisors, Senior Navigators and Elder Advocates.

Care managers partner with supportive resources for their clients, such as members of the National Association of Elder Law Attorneys (NAELA), American Association of Daily Money Managers and the National Association of Senior Move Managers.

The Mid-Atlantic Chapter Committee of ALCA serves Pennsylvania, Delaware, Maryland, Virginia and West Virginia.

Life Care Planning is a holistic, elder-centered approach to the practice of law that helps families respond to every challenge caused by chronic illness or disability of an elderly loved one. The goal of Life Care Planning is to promote and maintain the good health, safety, well-being, and quality of life of elders and their families. Elders and their families get access to a wider variety of options for care as well as knowledgeable guidance from a team of compassionate advisors who help them make the right choices about every aspect of their loved one's well-being.

OUR **MISSION** AT GOOD SHEPHERD FUND IS TO TRANSFORM THE WAY SPECIAL NEEDS TRUSTS ARE ADMINISTERED.

With knowledgeable planning and management services under one umbrella, we guide the way to a more fulfilling life for your loved one, and help you have peace of mind.

- **SPECIAL NEEDS TRUSTS.** *Special Needs Trusts (SNT's) are financial vehicles designed for persons living with disabilities. They enable the beneficiary who receives government assistance (SSI/Medicaid) to continue enjoying the benefit while paying for ancillary 'quality of life' expenses and needs.*

- **CONSERVATOR/ GUARDIANSHIPS.** *The Good Shepherd Fund acts as court-appointed conservator or guardian of adults with disabilities. We currently serve as the conservator or guardian for more than 100 individuals in California, Oregon, and Colorado*.

- **ESTATE PLANNING.** *Having your will prepared is one of the most important things you can do to protect your family and assets upon your death or incapacity. Your will gives you direct control in distributing your assets amongst your loved ones as well as who will be named…*

PATRON LEVEL

The BAYADA Way is at the heart of everything we do. BAYADA Home Health Care has a special purpose—to help people have a safe home life with comfort, independence, and dignity. Our agency provides nursing, rehabilitative, therapeutic, hospice, and assistive care services to children, adults, and seniors worldwide. We care for our clients 24 hours a day, 7 days a week.