

## SCHEDULE

### FRIDAY FEBRUARY 21, 2020

If arriving early, registrants have several options:

#### Omni Spa Treatments

If interested, contact the Omni's activity coordinator at 814-624-5633 for reservations and fee schedule. Omni recommends calling between 6—8 weeks in advance of your stay. Or, utilize their web-site to book treatments.

#### 2:00—3:30 PM

**Facilitated Unprogram** A forum for PAELA members to discuss legal issues of concern. This could include an update on implementation of Community Health Choices and Home and Community Based Services, estate planning involving tax qualified funds to trusts, revision of the POMS and effect on fees for elder law attorneys, and issues concerning ABLÉ accounts.

**Discussion Leaders:** Jan Colliton, CELA, Colliton Elder Law Assocs, PC; Karyn Seace, CELA, Nescio & Seace, LLP; Kristen Matthews, CELA, MacElree Harvey Ltd. Bring your questions and be eligible to win prizes for best questions that "stump the group!" No additional fee!

#### 4:00 —5:00 PM

**Yoga Session** with experienced yoga instructor, for all levels, no fee. Sign-up on PAELA online registration form.

#### 4:00—5:45 PM Registration

#### 5:45 - 6:45 PM Welcome Reception

Join your colleagues for a welcome reception. to enjoy networking with old and new peers. Dinner will be on your own after the reception. Make dinner reservations at the Omni, or restaurants in the Bedford area.

#### 7:00 PM

**Chef's Table Dinner** by reservation only; maximum of 18 guests. Call the Omni directly at 814-624-5642 or dinner on your own

### SATURDAY, FEBRUARY 22, 2020

#### 7:30 —8:45 AM

**Registration and Breakfast with Introduction of Sponsors**

#### 8:45—9:45 AM: SESSION 1

**Serving as an Expert Witness in Professional Liability Matters (Ethics)**

*Presented by Stephen Feldman, Esq, Feldman & Feldman LLP, and Jeff Brien, Minnesota Lawyers Mutual Insurance Company*  
Moderator Robert C. Gerhard, III, CELA, Gerhard & Gerhard, P.C.

#### 9:45—10:15 AM

**Break and visit with sponsor booths**

#### 10:15—11:45 AM: SESSION 2

**Understanding Medicare and Medicaid, How to Play in the Same Sandbox**

*Presented by William McKendree, Pennsylvania Healthcare Benefit Support*  
Moderator Anthony Marone, McAndrews Law Offices

#### 11:45 AM – 12:15 PM

**Meet Our Sponsors**

#### 12:15 — 1:15 PM

**Lunch and Pennsylvania Public Policy Update**

*Presented by Joseph Uliana, Uliana and Associates*

#### 1:15—2:15 PM: SESSION 3

**Pennsylvania Guardianship; Practical Challenges under the New Rules**

*Presented by The Honorable Paula Ott, Pennsylvania Superior Court*  
Moderator Karyn Seace, CELA, Nescio & Seace, LLP

#### 2:15—3:15 PM: SESSION 4

**Elder Law Insights**

*Presented by Bernie Krooks, Esq., Litman Krooks LLP*  
Moderator Marielle Hazen, CELA, Hazen Law Group

#### 3:15—3:30 PM

**Break and Visit with Sponsors**

#### 3:30—4:30 PM: SESSION 5

**Future of the Elder Law Practice**

*Presented by Bernie Krooks, Esq., Litman Krooks LLP*  
Moderator Linda Anderson, CELA, Anderson Elder Law

#### 4:30—5:30 PM

**Sponsors Reception** including open bar for some great networking.

#### 7:00 PM

**Chef's Table Dinner** by reservation only; maximum of 18 guests. Call the Omni directly at 814-624-5642

*Time also to Work-Out, Enjoy the Spa, Relax Before Dinner (on your own)*

### SUNDAY FEBRUARY 23, 2020

#### 7:30 AM Breakfast

#### 8:00—9:00 AM

**Book Discussion: "First: Sandra Day O'Connor"** by Evan Thomas. *"Lawyers and Judges are not immune. Dementia does not discriminate among the people it touches. Lessons that can be learned from the life of a Supreme Court justice and how she responded to her husband's diagnosis and her own in her professional and personal life as a lawyer, judge, and wife."*

*Presented by Sally Schoffstall, CELA, Schoffstall Elder Law*  
Moderated by Leslie Wizelman, CELA, Law Office of Leslie Wizelman

#### 9:00—10:00 AM: SESSION 6

**NAELA Update: Public Policy and Trends**

*Presented by David Goldfarb, NAELA Lobbyist*  
Moderator Marielle Hazen, CELA, Hazen Law Group

#### 10:00—10:30 AM

**Break and Visit with Sponsors**

#### 10:30 AM—12 Noon: SESSION 7

**Marketing Growth Plan; Our Year-long Strategy for Consistent, Predictable Law Firm Marketing Growth.**

*Presented by Tom Foster, Founder & CEO, Foster Web Marketing*  
Moderator Rich Newman, Law Office of Richard L. Newman

**CLE Credits.** PAELA has submitted the appropriate information to obtain CLE credits for this schedule. Currently pending.

**Speaker Handouts.** PAELA reaches out to all speakers for handouts at the winter meeting. They will be circulated to all registrants in advance of the meeting and posted on the website immediately following the meeting.

As of 11/19/2019

NOTE: Speakers and topics subject to change.

## Winter Meeting Details for Hotel, Online Registration, CLEs, Future Events

**12th Annual Winter Conference**  
Omni Bedford Springs Resort, Bedford, PA  
February 21-23, 2020

### CONFERENCE HOTEL

**OMNI Bedford Springs Resort & Spa**  
2138 Business Route 220  
Bedford, PA 15522 814-623-8100  
[www.omnihotels.com/hotels/bedford-springs](http://www.omnihotels.com/hotels/bedford-springs)

### Overnight Room Reservations

Call 814-623-8100 by **January 22, 2020**.  
Indicate attending PAELA Conference.  
OR register on Omni web-site using the

#### GROUP CODE LINK:

<https://www.omnihotels.com/hotels/bedford-springs/meetings/paela-winter-meeting-2020-02212020>

NOTE: Make your Omni overnight room reservation EARLY....PAELA's block fills up quickly!

### PAELA Room Rates

\$189 Single/Double Rooms  
\$319 Luxury Spa Rooms  
*Plus 6% sales tax, 2% local occupancy tax, and \$25 resort fee/room/night. Includes high speed and wireless internet access, valet parking, fitness center, pool, etc. Includes pre/post dates upon availability. No meals included which are not in PAELA registration fee.*

### Check-in and Check-out

Check-in 3:00 PM; Check-out 12 Noon

### Dining Rooms & Reservations

For dinner on Saturday night, call in advance for reservations at 814.624.5642. Dining Rooms include: 1796 Room, Frontier Tavern, The Crystal Room, Club House

### SPA Reservations

Make reservations 6-7 weeks out. Call 814-624-5633 or email [bsrspas@omnihotels.com](mailto:bsrspas@omnihotels.com)

**CLE CREDITS.** PAELA will be submitting the appropriate information to obtain CLE credits for this year's winter meeting schedule once the final session is confirmed with the speaker and topic. PAELA will announce when the approval is finalized so that you can plan your attendance at the 2020 winter conference.

**CONFERENCE REGISTRATION FORMS** for the 2020 Winter Meeting are available online for the first time ever as PAELA has updated and redesigned their website. The event online registration form can be found at PAELA's website at [www.paela.info](http://www.paela.info) then click the event tab. Note that this event is only open to current PAELA members.

**REGISTRATION FEES.** Fees for the 2020 Winter Conference are as follows:

\$515 if registering online prior to 12/31/2019  
\$540 if registering online between 1/1—31/20  
\$590 if registering online after 1/31/2020

There are guest fees if a spouse or companion would like to attend the Friday reception and other meal functions. Guests do not include an employee of the firm that you work for.

**PAYMENT OF FEES.** PAELA is now taking credit card payments for online registrations! You also have the option to pay by check. If paying by check send to (note updated address from last year):

PAELA c/o Farrell Associates, LLC  
1706 Liberty Cove  
Mechanicsburg, PA 17055

**CANCELLATION POLICY:** No refund of registration fees after **January 25, 2020**.

**NOTE ON INCLEMENT WEATHER.** In the event of inclement weather, registration fees are nonrefundable unless under the terms of PAELA's contract with the hotel, the conference is cancelled.

**SPEAKER HANDOUTS.** Handouts will be posted on the PAELA web-site after the conference and available through Dropbox links in advance of the meeting.

**WHAT TO WEAR.** Dress is business casual. If participating in the Yoga classes, bring relaxed loose fitting clothing and comfortable shoes as well as a yoga mat if you have one.

### QUESTIONS?

Bob Gerhard, co-chair  
[rgerhard@paelderlaw.net](mailto:rgerhard@paelderlaw.net)

Bill Blumer, co-chair  
[wblumer@leisawitzheller.com](mailto:wblumer@leisawitzheller.com)

Elaine Farrell, administrator  
[efarrell@farrell-assoc.com](mailto:efarrell@farrell-assoc.com)

### FUTURE PAELA EVENTS

#### 2020 Summer Meeting

July 15, 2020  
Crowne Plaza Harrisburg Hotel  
Harrisburg, PA

#### 2021 Winter Conference

February 26, 27, 28, 2021  
Omni Bedford Springs Resort & Spa  
Bedford, PA

**SPONSORSHIPS.** PAELA is in the process of securing sponsoring companies for the 2020 Winter Conference. Sponsors play a key role in the success of PAELA's events and encourage all attendees to take the time to visit their exhibit. Sponsors also have time at the microphone to tell registrations about the products and services they can make available to elder law attorneys.