

**SCHEDULE**

As of 1/19/2020

**FRIDAY, FEBRUARY 21, 2020**

If arriving early at the Omni, some options for consideration:

**Omni Spa Treatments**

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—Eisenhower Room  
 Facilitated Unprogram**

A forum for PAELA members to discuss legal issues of concern such as implementation of Community Health Choices, 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, issues concerning ABLE accounts, and other topics of interest.

**Discussion Leaders:** *Jan Colliton, CELA, Colliton Elder Law Associates, 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 to attend this session.*

**3:30 —5:45 PM Registration—Main Lobby**

**4:00 —5:00 PM—Eisenhower Room**

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

**5:45 - 6:45 PM Welcome Reception—First Ladies Lounge, 2nd Floor**

Join your colleagues for a welcome reception to enjoy networking with old and new peers. Reception is **sponsored by ACHIEVA Family Trust and Legacy Enhancement Trust.**

Dinner will be on your own following the reception. Restaurants at the Omni or in Bedford are available for you to enjoy.

**SATURDAY, FEBRUARY 22, 2020**

All sessions will be held in the Colonnade Room on the 2nd level.

**7:30 —8:45 AM**

**Registration and Breakfast with sponsor Introductions**

**8:45—9:45 AM: SESSION 1**

**Serving as an Expert Witness in Professional Liability Matters**

*Co-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 exhibits**

**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**

**Introduction of Sponsoring Companies**

**12:15 — 1:15 PM**

**Lunch and Pennsylvania Public Policy Update**

*Co-presented by Joseph Uliana, Uliana and Associates, and Marielle Hazen, CELA, Hazen Law Group*

**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., Littman 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., Littman Krooks LLP*

**4:30—5:30 PM**

**Sponsors Reception** including open bar and great networking.

*Time also to work-out in the fitness center, enjoy the spa, relax before dinner which is on your own.*

**SUNDAY, FEBRUARY 23, 2020**

**7:30 —9:00 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 both her professional and personal life as a lawyer, judge, and wife."*

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

**9:00—10:00 AM: SESSION 6**

**NAELA Update: Public Policy and Trends**

*Co-presented by David Goldfarb, NAELA Senior Manager of Public Policy, and 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.** This meeting qualifies for 7.5 CLE credits.

**Speaker Handouts.** Handouts for the winter meeting are circulated to all registrants in advance of the meeting and posted on the PAELA web-site immediately following the meeting.

**NOTE:** *Speakers, topics, and times subject to change.*

**Omni Bedford Springs Resort & Spa**

*Check-in is 4:00 PM and check-out is 11:00 AM. Late check-out up to 2:00 PM may be available for a rate of \$50.*

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

## 12th Annual Winter Conference

Omni Bedford Springs Resort & Spa, 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.*

### Check-in and Check-out

Check-in 4:00 PM; Check-out 11 AM.

### Dining Rooms & Reservations

For dinner on Friday and Saturday nights, 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 by calling 814-624-5633 or email

[bsrspas@omnihotels.com](mailto:bsrspas@omnihotels.com)

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**CLE CREDITS.** There are 7.5 CLE credits for the 2020 PAELA winter meeting. Registrants are responsible for submitting the required form and fee to the CLE governing organization.

**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 winter meeting online registration form can be found at [www.paela.info](http://www.paela.info) then click the event tab. Note that this event is only open to current PAELA members and requires your NAELA login (NAELA manages PAELA membership).

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

\$515 - registering online prior to 12/31/2019

\$540 - registering online 1/1—31/2020

\$590—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. Guest does not include an employee of the firm where you are employed.

**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, Programming Co-chair  
[rgerhard@paelderlaw.net](mailto:rgerhard@paelderlaw.net)

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

Elaine Farrell, PAELA 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

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**SPONSORSHIPS.** PAELA has secured 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.