

WELCOME INFORMATION FOR PAELA MEMBERS

as of 1/13/2021

Dear PAELA Members,

Virtual! As we all work through the COVID19 that has rearranged how we all do business in Pennsylvania and nationwide, PAELA's Board voted to make a change to the 2021 Winter Meeting to an all Virtual venue. This is best for everyone as we try to keep you safe by following CDC guidelines. It is also an exciting opportunity to organize a meeting that brings everyone together virtually for the first time. How is PAELA doing this?

True Link Provides Assistance With the Virtual Meeting. When PAELA's Board decided to make the winter meeting Virtual, where do you start? PAELA would like to take this opportunity to thank True Link, a past sponsor of PAELA meetings, for taking on the organization of the Virtual meeting with the assistance of Chip Henslee, Marketing Manager, who has the exceptional skills needed to manage virtual meetings. A message from True Link:

True Link is a financial services firm dedicated to serving vulnerable older adults, people with intellectual and developmental disabilities, and people in recovery. Families and professionals rely on True Link every day to help protect loved ones, clients, and beneficiaries. Our tools and services have become increasingly crucial during COVID-19, helping individuals receive the funds they depend on and make essential purchases while remaining at home.

During this time of stay-at-home orders, the professionals we serve have also been seeking ways to meet safely online with their colleagues and networks. As a "remote first" company, True Link has a lot of experience hosting and moderating virtual meetings and events. Beginning in March, we have volunteered our time to support deserving groups who need help moving their educational sessions and conferences online.

We are honored to be able to lend a hand to The Pennsylvania Chapter of NAELA for your upcoming virtual meeting. Aligned in your mission to strengthen, train, assist, and support professionals in your state, we believe that providing opportunities for you to connect and learn is an important part of serving the communities we all care about.

EDUCATION and CLE. PAELA's Programming Committee has organized a phenomenal agenda of speakers with timely topics for your elder law practice. The second page of this document details dates and times of all sessions. All sessions are currently expected to be "Live" sessions with no pre-recorded education!



PAELA has submitted an application to become a Distance Learning Provider with PACLE. There will be CLE credits for most of the courses.

SPECIAL SESSION ON FEBRUARY 12, 2021. Will McKendree is providing a special session in advance of the February 26-27, 2021 Winter Meeting. Please review to the schedule on the second page. Note that registration for this Special Session is included on the on-line registration form and is included in the registration fee.

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

NEW FOR 2021. Registrant Welcome Box! PAELA is inviting sponsoring companies to ship their promotional materials and a swag item which will be included in a Welcome Box for all PAELA members registering for the Virtual Winter Meeting.

The Welcome Box will be shipped in advance to all PAELA members registered for the 2021 Virtual Winter Meeting.

SPONSORS. PAELA will continue to invite companies that provide products and services to elder law attorneys....but it will be a little different! Because the 2021 Winter Meeting will be virtual, we have invited sponsoring companies to record a 3-5 minute video promoting what their company can offer PAELA members and their elder law clients. The pre-recorded sessions will be interspersed throughout the two day event. PAELA is very appreciated of the sponsoring companies who have supported PAELA meetings over the past ten years.

BREAKS AND SOCIAL OPPORTUNITIES In addition to the education provided with the Virtual Winter Meeting, the Programming Committee will be meeting to discuss how breaks,

social networking and other items will be address. Stay tuned for continued updates to the Schedule!

REGISTRATION FEES

NOTE: Registration is limited to PAELA members only.

PAELA member registration fees for the 2021 Virtual Winter Meeting are as follows:

- **\$250 Early Bird Rate** expires December 31, 2020. This rate guarantees that you will receive a Welcome Box.
- **\$275** rate for January 1-31, 2021. This rate guarantees that you will receive a Welcome Box
- **\$300** rate for February 2021. This rate does not guarantee a Welcome Box due to limited quantities.
- Payment for registration fees is limited to credit cards only which will appear at the end of the on-line registration form.

CANCELLATION POLICY: No refund of fees after January 31, 2021.

QUESTIONS?

2021 Winter Meeting Co-Chairs
 Bill Blumer, Programming Co-chair
 wblumer@leisawitzheller.com

Karyn Seace, Programming Co-chair
 klseace@nescioseace.com

2021 Winter Meeting Administrator
 Elaine Farrell, PAELA Administrator
 efarrell@farrell-assoc.com



Registration will take place online on PAELA's website www.paela.info, click on the Events Tab, and navigate to the 2021 Winter Meeting registration. **Payment is by credit card** at the end of the on-line form that you complete and submit. NOTE: Registration for this meeting is limited to current PAELA members only.

December 31, 2020—Early Bird Registration of \$250 per person expires
January 31, 2021— \$275 registration fee expires
February 1, 2021—\$300 registration fee applies

EDUCATION SCHEDULE

****ATTENTION****

FRIDAY, FEBRUARY 12, 2021

Special Session for all Registrants and Sponsors

10:00 – 11:00 AM SESSION #1

William McKendree, Pennsylvania Healthcare Benefit Support

“What Mama Didn’t Tell You About Medicare”
It might appear to be straightforward – it was supposed to be that way when it was imagined in the 1960s, but the Medicare system of delivering health care coverage for over 50 million people has evolved into a confusing, frustrating and worrisome thing that has led many to sing the blues in the night. How to use the Medicare system effectively is an essential part of transition planning – what options are available, how to access them and how to evaluate which options will work best. We will look at the rules governing enrollment into Medicare (and how the enrollment process has broken down in the “Time of Pandemic”); the various components of the Medicare system and how they coordinate with each other (and with health coverage components outside the Medicare system); and how to use these components to create an effective individual coverage strategy.

FRIDAY, FEBRUARY 26, 2021

9:00 – 10:00 am - SESSION #2

James Lange, Lange Financial Group & Matthew Schwartz, Lange Legal Group, LLC

“Attorney’s Guide to Beating the New Death Tax: How to Stop the IRS from Taking Up to one-third of Your and Your Client’s IRAs and Retirement Plans after the SECURE Act.” (Includes 2-page outline)

10:15 – 11:30 am SESSION #2 Continued

12:25 - 12:45 pm - SESSION #3

Joe Uliana, J.M. Uliana Associates

“State Legislative Updates & Issues”

Former state Senator Uliana will provide a state legislative update, focusing on how the new Pennsylvania General Assembly will address legislation on issues of importance to PAELA members such as:

- Remote notarization
- Pennsylvania Orders of Life Sustaining Treatment
- Major Re-write of the Older Adult Protective Services Act that has been considered over the last two legislative Sessions
- Proposed changes to Guardianship, including legislation affecting adult disabled guardian-

ship

- Filial Support
- Legislation to merge the Departments of Health and Human Services
- Elder abuse powers of attorney

In addition to these PAELA specific issues, Joe will provide insights into how the new legislature will address Pennsylvania’s budget issues in the wake of COVID 19, the overall legislative agenda and the general political climate of the Commonwealth.

12:45 -1:30 pm - SESSION #4

Erica Asbell, Esq., Public Policy Associate, State chapters, NAELA, and Marielle Hazen, Hazen Law Group

“National Legislative and Regulatory Update for Elder Law Attorneys”

Learn and understand about recent and upcoming changes to Federal law and regulation that could impact Elder Law Practice. Topics include changes to Medicaid eligibility, home and community-based services, and income taxation

1:30 – 2:30 pm - Session #5

Secretary Robert Torres, PA Secretary of Aging “Current Issues before Pennsylvania’s Department of Aging”

“Secretary Robert Torres of Pennsylvania’s Department of Aging will be discussing issues that are currently before the Department that would impact Elder Law Attorneys in representing their clients. This would include the Department’s ongoing response to the Covid-19 pandemic.

3:00-4:30 pm - Session #6

Coordinating Medicare and Medicaid Benefits – for ‘Dual Eligible’ Beneficiaries

William McKendree, Pennsylvania Healthcare Benefit Support

Millions of Americans are enrolled in both the Medicare and Medicaid programs – they are called ‘dual eligibles’. This presentation will examine the characteristics of dual eligibility – the benefits that each program (Medicare and Medicaid) provides, how each program coordinates with the other, and the special problems that dual eligibility generates. We will also look at the impact of the Community Health Choices (CHC) initiative on access and utilization of healthcare by dual eligibles in Pennsylvania

SATURDAY, FEBRUARY 27, 2021

9:15 – 10:15 am - Session #7

Judge Stanley Ott, Of Counsel, Mannion Prior “The Benefits of Mediating Elder Law/ Guardianship Disputes”

This session will explore the cost and time saving benefits realized by using mediation to resolve

classic Elder law/guardianship issues. Learn how an experienced mediator can be effective in preserving family relationships from the ravages of litigation.

10:15 – 11:15 - Session #8

Tracy Fox, Foresite and Kyle Ackerman, Lynx 3 Key Ways Law Firms Can Protect Themselves from Cyber Risk

In this session, we will review cyber threats that put law firms at risk, some you hear about almost daily in the news and some that you may never have thought of. We will look at actual scenarios, the causes, and impact to the firms. Most importantly, we will discuss 3 key ways to protect yourself by minimizing your cyber risk and provide a checklist for you to take action.

11:15-11:30 am - BREAK

11:30 am – 12:30 pm - Session #9

Facilitators: Janet Colliton, CELA, Colliton Law and Karyn L. Seace, CELA Nescio & Seace Advanced Elder Law Issues, Current Events

Topics this year will include the following:

- Pennsylvania’s New Remote Notarization Law, Hot or Not? interstate recognition of notary acts and Pennsylvania’s new remote online notary law. Act 15 of 2020 (S.B. 841).
- Setting Every Community Up for Retirement Enhancement Act, (SECURE Act).
- The Family First Coronavirus Response Act, Public Law No. 116-127, §6008, (3/18/2020) and its impact on Medicaid planning during the COVID emergency.
- Legal issues surrounding the Department of Human Services seeking estate recovery for payments made by Commonwealth to Managed Care Organizations (MCOs) during transfer penalty imposed by County Assistance Office. [62 P.S. §1412](#)
- Update of Pennsylvania’s Filial Support law, Year in Review. 23 Pa.C.S. §4603
- Zoom and client confidentiality.
- Living Wills and ventilator clauses.
- Practice and procedure before the DHS Bureau of Hearings and Appeals during the pandemic.
- Litigation against CCRCs for failing to timely refund entrance fees. Reviewing CCRC agreements.
- How to comply with applicable laws, regulations, and directives regarding COVID safety in the workplace, for employees and guests

Note: schedule will be updated with breaks, social and networking sessions, etc. in the near future.