

Presents

Special Needs Trust Series: a CLE Opportunity for PAELA Members

September 29, 2021 • October 21, 2021 • November 18, 2021

PAELA OBJECTIVES: To promote a higher standard of practice in the field of elder law, including promotion of a higher level of competency among its members and promotion of scrupulous adherence to ethical standards among its members.

As a service to all PAELA members, the Programming and Membership Committees have organized a series of three Special Needs Trust sessions during 2021 which require registration but at no cost to the members! All sessions will be held from 12 Noon to 1:00 PM and provide 1 CLE for any PAELA registrant who qualify. You may register for one or all sessions separately with a Zoom link.

SEPTEMBER 29, 2021

Best Practices for Making Distributions from a Special Needs Trust For a Beneficiary Receiving SSI

Presented by:

- * **Law Offices of Anna Sappington**
Anna Sappington anna@sappingtonlaw.com
- * **Commonwealth Community Trust**
Karen Dunivan Konvicka, JD, Director of Client Services and General Counsel
kkonvicka@trustcct.org

Moderated by Anthony Marone, Esq., Harvey, Ballard and Bornstein

NOVEMBER 18, 2021

Sheltering Income and Resources—Pooled Special Needs Trusts

Presented by:

- * **ACHIEVA**
Jacquelyn Elise Connell, Esq., Director of Legal & Trust Administration Services
jconnell@achieva.info

Moderated by:

- * **Julian Gray Associates**
Robert K. Schweitzer, CELA
rob@grayelderlaw.com

OCTOBER 21, 2021

Real Estate in a Special Needs Trust

Presented by:

- * **Harvey, Ballard and Bornstein**
Anthony L. Marone, Esq.
Anthony.marone@hbblic.com
- * **S&T Wealth Management**
Stephen J. McGann, CTFA, AEP, Vice President, Wealth Management Advisor
stephen.mcgann@stbank.com
Geoffrey McCarthy, JD, CTFA, VP, Senior Wealth Management Advisor
Geoffrey.mccarthy@stbank.com

PAELA SNT SERIES

CLE Credits— one (1) CLE substantive credit is available for any PAELA member registered and verified as attending this session. Course difficulty level is intermediate.

Cost—no cost for any PAELA member to register and participate in this course. Advance registration is required. PAELA will pay for each registrant's CLE credit in the amount of \$1.50 each. Registration restricted to PAELA members only.

Handouts—speakers will provide detailed handouts for all registrants in advance of the session.

Registration— PAELA has circulated the registration process through PAELA's ListServ that included a Zoom link for each of the 3 sessions.. Registration is limited to PAELA members only.

Method of Delivery—this session will be completed via Zoom Webinar. A poll will be presented as a means to verify your attendance, and an evaluation form circulated and required to qualify to complete for the CLE credit (as required by PACLE).



PAELA is registered as a PACLE approved accredited provider to present CLE approved courses. PAELA will enter all earned CLEs for course registrants.