

### THURSDAY, FEBRUARY 24, 2022

#### 3:00—5:30 PM

**Registration Desk open—Main Lobby**  
*Time to enjoy the Omni property with hiking, spa treatments, tour of the Omni, and much more.*

#### 5:30—7:00 PM

**Welcome Reception—Eisenhower Room**  
*Enjoy networking with your peers who you have not seen in awhile, food stations with wine pairings, open bar, raffle, etc.*

### FRIDAY, FEBRUARY 25, 2022

#### 7:30—8:30 AM

**Breakfast Buffet with Omelet Station**

#### 8:30—9:00 AM

**Meet the Meeting Sponsors**

#### 9:00—9:30 AM

**2022 Winter Meeting Opens**  
**Tammy Weber, CELA, PAELA President**  
*Review of today's schedule, introduction of sponsor companies, announcements, WiFi*

#### 9:30—10:30 AM SESSION 1

**Ways & Means Committee Advances Tax Bill Legislation to Budget Committee: Proposed Tax Increases Get One Step Closer! (1 CLE)**  
Presented by Robert Keebler, CPA/PFS, MST, AEP Distinguished, CGMA, Partner, Keebler & Associates, LLP  
Moderated by Linda Anderson, CELA, Anderson Elder Law

*Additional information on Sessions 1 and 2 on tax legislation will be available to the membership once Congress concludes at the end of December 2021.*

#### 10:30—10:50 AM—BREAK

#### 10:50—11:50 AM SESSION 2

**The Ways & Means Bill is a Game Changer: New Limits on Roth IRA Conversions & Forced Distributions from MEGA Roth IRAs, 401ks and Traditional IRAs (1 CLE)**  
Presented by Robert Keebler, CPA/PFS, MST, AEP Distinguished, CGMA, Partner, Keebler & Associates, LLP  
Moderated by Linda Anderson, CELA, Anderson Elder Law

#### 11:50 AM—12:30 Noon Announcements & Lunch

#### 12:30 PM—1:30 PM SESSION 3

**LEGISLATIVE UPDATES ON ELDER LAW (1 CLE)**

#### PA State Legislative Updates

Presented by Joseph Uliana, JM Uliana & Associates  
Moderated by Marielle Hazen, CELA, Hazen Law Group

*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. 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.*

#### NAELA Legislative Update

Presented by David Goldfarb, Sr. Manager, Public Policy, NAELA  
Moderated by Marielle Hazen, CELA, Hazen Law Group

*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 4

**Current Complex Issues with Guardianships and POA Abuse Cases (1 CLE)**  
Presented by Thomas J. Dempsey, Jr., Jones Gregg Creehan & Gerace  
Moderated by Tammy Weber, CELA, Marshall, Parker & Weber, LLC

*How Elder Law Attorneys Can Address to Avoid/Minimize Litigation and Professional Liability Exposure.*

#### 2:30—2:50 PM—BREAK

Time for all attendees to spend some time with the sponsoring companies to learn what each can offer you as elder law attorneys.

#### 3:00—4:30 PM SESSION 5

**Virtual Reality: A Journey Through Alzheimer's Disease (1 CLE)**  
Presented by Marissa Marshall, CELA, Kreisher Marshall & Associates LLC and Marianne Kreisher, CELA, Kreisher Marshall & Associates LLC  
Moderated by Karyn L. Seace, CELA, Nesco & Seace, LLP

*Additional information on this important topic will be available in the near future.*

#### 4:30 PM

Conference concludes for the day. Announcements on options for this evening:

- Dinner on-your-own at the several Omni restaurants
- Bourbon Tasting (registration required)
- Fire Pit with S'mores PAELA picking up the cost
- Cigars with Stan and Friends

Continued on next page...

**SCHEDULE Continued**

**SATURDAY, FEBRUARY 26, 2022**

**8:00—8:45 AM**

**Breakfast and Book Review**

***The Big Finish by Brooke Fossey***

Presented by Michelle Berk, Law Offices of Michelle C. Berk, PC and Sally Schoffstall, CELA, Schoffstall Elder Law

*NOTE: Attendees are encouraged to obtain and read this book in advance so you can contribute to the discussion.*

**8:45—9:45 AM SESSION 6**

***Handling of Entrusted Funds by Estate & Elder Law Attorneys* (1 ethics CLE)**

Presented by Ellen Freedman, CLM

Moderated by Robert Gerhard, CELA, Gerhard & Gerhard, P.C.

*One of the most common reasons for the imposition of serious discipline against a lawyer is the lawyer's failure to handle fiduciary funds properly. Recent changes in the law, including mandatory overdraft notification, direct notification to clients of insurance payments, and mandatory IOLTA requirements indicate the wide range of concern within the courts, the legislature, and the public as to the importance of proper handling of fiduciary funds. Different methods*

*for billing fees — flat fee, hourly, percentage — can make it unclear when it is appropriate to take funds from trust to deposit into the lawyer's operating account. Additional complications arise when fees are considered non-refundable, or when the client agrees to have future charges put on their credit card. Getting the correct language clearly stated in the engagement agreement is often the key to avoid running afoul of ethical requirements.*

*This course will bring you up to date on requirements and best practices.*

**9:45—10:00 AM—BREAK**

**10:00—11:00 AM SESSION 7**

***Winding Down Your Elder Law Practice:***

***Succession Planning Starts Now* (1 Ethics CLE)**

Presented by Ellen Freedman, CLM

Moderated by Robert Gerhard, CELA, Gerhard & Gerhard, P.C.

*What does retirement mean to you? Work until you drop? (And leave the "clean-up" to others?) Scale back and work just a little? Do you want to salvage sweat equity by selling or transitioning your practice, or will you just turn off the lights and close the door on your last day? This session will discuss your options as an elder law attorney, with an eye on your ethical obligations to your clients, what the Rules permit, and the myriad of practical implications*

*that come into play. It will also educate you as to the amount of time you will need to invest to implement the various strategies.*

**11:00 AM—12:00 Noon SESSION 8**

***Advanced Elder Law Issues, Current Events* (1 CLE)**

Presented by Karyn L. Seace, CELA, Nescio & Seace, LLP

Janet Colliton, CELA, Colliton Elder Law Assocs., PC

*This is a moderated discussion about relevant elder law topics. The topics will be chosen closer to the event by member poll. The top five topics will be listed. However, just because a topic is listed does not mean that it will actually be discussed. Topics will be handled as time permits. This will be moderated but interactive discussion and Q&A will be a part of the lecture.*

**12:00 Noon**

**2022 Winter Meeting concludes with announcements**