

## 2024 Conference Topics and Speakers as of 11/3/2023

**“WHEN DISASTER STRIKES”** is a look at how your law practice can prepare for fires, floods, internet outages & invasions, death, disability, arrest, Disciplinary Board inquiries, Grand Jury subpoenas, and other unlikely (but true) events. Using real life examples our goal is to scare you into some simple advance planning that will allow you to minimize the “disaster” when it strikes. Speakers include Magistrate Judge William Arbuckle and Tammy Weber. (1 Ethics CLE)



**Magistrate Judge William “Skip” Arbuckle**  
U.S. District Court M.D. of PA

William I. Arbuckle, III is a federal magistrate judge on the United States District Court for the Middle District of Pennsylvania. He began serving in this position on July 29, 2008, as a part-time magistrate. Arbuckle was appointed as a full-time magistrate on June 8, 2017. Judge Arbuckle began his career in 1974 as an assistant public defender and assistant prosecutor in Ohio. He moved to Pennsylvania and joined the law firm Knox, Graham, McGlaughlin, Gornall & Sennett in 1979. In 1980, he became the chief public defender in Erie County, Pennsylvania. The following year, he became a deputy attorney general. He then worked briefly as a private practice lawyer in 1985 and 1986 before becoming counsel to the Judicial Conduct Board and former J.I.R.B. He was in private practice again in State College, PA from 1994 until he went on the bench full-time in 2017. Judge Arbuckle received his B.A. degree in political science from Grove City College in 1971. He then earned his JD degree from Akron University School of Law in 1974.



**Tammy A. Weber CELA**  
Marshall, Parker & Weber, LLC

Ms. Weber is the managing principal of Marshall, Parker & Weber, LLC with offices in Williamsport, Jersey Shore, and Plains, Pennsylvania. Her practice focuses on elder law, estate and business succession planning. She graduated magna cum laude from Lycoming College and received her law degree from Temple University. She is a certified elder law attorney (CELA) by the National Elder Law Foundation. She is also a VA accredited attorney for the preparation, presentation, and prosecution of claims for veterans benefits before the Department of Veterans Affairs. She previously served as a federal judicial law clerk for the Honorable Louis C. Bechtel, and as an Assistant United States Attorney for the Eastern District of Pennsylvania where she was involved with major federal investigations and prosecutions. While in this position, she was the recipient of the Department of Health & Human Services Inspector General's Integrity Award for the investigation and criminal conviction of the first Medicare money laundering seizure case in the country. Ms. Weber has also served as an adjunct professor at Saint Joseph's University Graduate Criminal Justice Program where she designed and taught a course on law and social policy. For several years, she sat on the editorial board of the Legal Intelligencer. She is currently a course planner for PBA/PBA's Elder Law Institute. She is an active member of various professional and community organizations. She is a Past President of the Lycoming Law Association and the Elder Law Council for the Pennsylvania Bar Association, President of the Pennsylvania Association of Elder Law Attorneys (2022-2023). She is a member of the Northcentral Pennsylvania Estate Planner's Council and the National Academy of Elder Law Attorneys. She serves on the Ethics Advisory Board for Albright LIFE and is a member of the American Inn of Courts.

**“SPECIAL NEEDS TRUST LANGUAGE FOR ABLE ACCOUNTS; AGENTS, LONG-TERM CARE PLANNING”** (1 Substantive CLE)



**Zach B. Bloxham, Elder Law Faculty**  
WealthCounsel, LLC

Zach Bloxham is WealthCounsel's Elder Law Faculty, where he assists attorneys and other stakeholders from around the country in navigating the world of public benefits planning, consultation, and strategy. Zach works to provide comprehensive legal education, supplying attorneys with practicable solutions and positive outcomes for their clients. Before following his passion for education and joining WealthCounsel, Zach spent nearly a decade as a partner in an elder law firm that specialized in planning for Medicaid, Veterans' Pensions with Aid and Attendance, special needs, and estate recovery. Zach is licensed to practice law in Utah where he lives with his wife and their four children. In his free time, Zach enjoys writing, history, sports, and serving on his local city council.

**“THE TAXPAYERS (AND THEIR ATTORNEY) GET A MULLIGAN”** A review of *Ebersole v Commonwealth* and other significant elder law cases over the past year. (1 Substantive CLE)



**Robert Clofine CELA**  
The Elder Law Firm of Robert Clofine

Robert has practiced in York, PA since 1985 with a primary focus on elder law, estate planning and administration, nursing home asset protection, and related matters. He has been Certified as an Elder Law Attorney (CELA) by the National Elder Law Foundation. He is a frequent contributor to local newspapers and has authored over 300 articles on issues of estate planning and personal finance. Mr. Clofine has been mentioned and quoted by USA Today, Money Magazine, Kiplinger’s Personal Finance, Kiplinger’s Retirement Report, Mutual Fund Magazine, The Wall Street Journal, Bloomberg Personal Wealth Manager and Fortune Magazine in articles dealing with estate planning and elder law. Mr. Clofine is a frequent speaker at professional conferences where he instructs other lawyers on Wills, Estates and Elder Law. He has been selected as a Pennsylvania Super Lawyer in the field of Elder Law every year since 2005. He has also been included in The Best Lawyers in America in the field of Elder Law every year since 2008 and was selected as Attorney of the Year in Elder Law for the Harrisburg region in 2014-2015. Mr. Clofine is a fellow of the prestigious American College of Trust and Estate Counsel and a member of the Joint State Government’s Commission’s Advisory Committee on Decedent’s Estate Laws. He is a founding member and the former President of the Pennsylvania Association of Elder Law Attorneys, a member of the National Academy of Elder Law Attorneys and a member of the Pennsylvania Bar Association, where he is a former Chair of the Elder Law Section. He is a 1978 cum laude graduate of Villanova University and a 1982 cum laude graduate of the University of Pittsburgh School of Law.

**“MEDICAID PLANNING IN GUARDIANSHIP CASES”** (1 Substantive CLE)



**Adam J. Cohen**  
Begley Law Group, PC

Associate Attorney Adam J. Cohen, Esq. currently concentrates on Estate Administration at Begley Law Group, where he also practices Estate Planning and Elder Law. Having graduated *magna cum laude* with his BA in Political Science from The University of Pittsburgh, Adam went on to earn his J.D from the University of Pittsburgh Law School, where he was the recipient of the CALI Award for Excellence in Elder Law.

During his time in college, Adam was involved in efforts to provide free legal services to low-income seniors through the SeniorLAW Center in Philadelphia, and again worked with low-income elderly clients on issues related to estate planning at with The Elder Law Clinic in Pittsburgh, PA. Adam spent several years as an Elder Law and Estate Planning attorney before joining Begley Law Group. His dual-state license allows him to practice in both Pennsylvania and New Jersey. Outside of work, Adam likes spending time with his family, gardening, bike riding and backpacking.

**“AI IN YOUR LAW PRACTICE?”** (1 Substantive CLE)



**MICHAEL DELANEY CELA**  
DDV Law, Ltd

A senior partner in the firm, Michael Delaney is a Certified Elder Law Attorney; Limiting his practice to Elder Law, Mr. Delaney focuses specifically on Guardianship and Probate litigation. Mr. Delaney is an experienced GAL (Guardian ad Litem), and he is frequently appointed by Courts to represent the best interests of an elder during a Guardianship Proceeding. Additionally, Michael serves families seeking to aid a disabled loved one to obtain the protection of a Guardian. He has also worked on many cases helping victims of financial exploitation and undue influence recover funds from unscrupulous individuals.

Serving as a frequent lecturer to other attorneys as a faculty member of the Illinois Institute of Continuing Legal Education, Mr. Delaney is passionate about using his knowledge to educate others. Mr. Delaney earned his bachelor’s degree from the University of Illinois at Urbana-Champaign, and his Juris Doctorate from Northwestern School of Law of Lewis & Clark College in Portland, Oregon. He resides in Chicago with his wife and law partner, Amy Delaney, and their family. *Although the Illinois Supreme Court does not require board certification to practice elder law, it evidences the strong commitment to and expansive knowledge of elder law.*

**“WAIVER: IS THE JUICE WORTH THE SQUEEZE? PANEL DISCUSSION”** presented by Kathleen Magee, Richard Newman, Julie Anderson, CELA, and Colleen Brackovitch (1 Substantive CLE)



**Kathleen Magee, Director of Care Coordination**  
Rothkoff Law Group, Elder Care Law

Kathleen Magee joined the Rothkoff Law Group in 2014 as a Geriatric Care Coordinator and transitioned to the Director of Care Coordination in 2019. She primarily works with clients in the Philadelphia and Bucks County area in our Pennsylvania Elder Law offices. She joined the firm with nearly five years of experience in a skilled nursing setting in Montgomery County, PA. Originally working as an Activity Coordinator with the recreational therapy department, Kathleen was able to develop relationships with the residents while enhancing their quality of life through various cognitive, physical, and social activities. She would later transition to the role of Social Services Coordinator, where she

continued to expand her skills for care coordination, patient/resident advocacy, and has developed vast knowledge for resources available for the aging population.

Since joining the Rothkoff Law Group, Kathleen has received a "Certificate in Elder Care Coordination" through Stockton Center on Successful Aging. She currently serves on the Board of Directors for the Life Care Planning Law Firm Association (LCPLFA). Kathleen graduated from Bloomsburg University of Pennsylvania with a bachelor's degree in psychology. During her free time, Kathleen enjoys staying active through yoga and running, spending time with friends and family around the table, whether it is to enjoy a delicious meal or play a fun game!



**Richard Newman, Elder Law Attorney**  
**Rothkoff Law Group**

Richard L. Newman, Esq., founder of the former Newman Elder Law, joined Rothkoff Law Group and works primarily with clients in their Doylestown, PA office. Mr. Newman is licensed in the Commonwealth of Pennsylvania and practices Elder Law and Special Needs Planning. His practice serves clients in Bucks and Montgomery Counties, Philadelphia, and the surrounding suburbs. Mr. Newman has more than 36 years of legal experience and is affiliated with the following organizations National Academy of Elder Law Attorneys; Pennsylvania Association of Elder Law Attorneys; Pennsylvania Bar Association; Bucks County Bar Association; Academy of Special Needs Planning. He is a Past Chair of the Pennsylvania Bar Association's Elder Law Section and past president of the Bucks County Estate Planning Council. Mr. Newman is an active member of several business and civic organizations including the Bucks County Area Agency on Aging Advisory Council and Doylestown Rotary Club (president from 2012-2013). A graduate of Temple University School of Law (1986), Mr. Newman was a Phi Beta Kappa graduate of Temple University in 1983.



**Julie C. Anderson CELA**  
**Trinity Elder Law & Estate Planning LLC**

Julie C. Anderson is the founder of Trinity Elder Law & Estate Planning LLC. Julie is certified as an Elder Law Attorney by the National Elder Law Foundation, and her practice is dedicated exclusively to elder law and estate planning. She is also a Certified Dementia Practitioner and a Certified Alzheimer's Disease and Dementia Care Trainer. She is a frequent lecturer on topics including Medicaid planning, tax-based estate planning, and the estate administration process. Julie's own experience with her grandmother provided firsthand knowledge of the emotional stress and financial pain associated with not planning for long-term care.

Julie resides in Forward Township with her Australian Cattle dog Mo, and enjoys spending time with her horses, donkey, and cat at her family farm in Butler Township. Julie is a member of the National Academy of Elder Law Attorneys, the Pennsylvania Association of Elder Law Attorneys, the Butler County Bar Association, and Pennsylvania Bar Association. She is admitted to practice before the Supreme Court of Pennsylvania. She grew up in Butler County in Pennsylvania and graduated from Butler High School before attending the University of Pittsburgh and Valparaiso University School of Law.

Julie is committed to serving her community. She is currently a co-chair of the Women's Leadership Council of the United Way of Butler County. She serves as a board member for the United Way of Butler County and the Butler County Bar Association Foundation, the charitable arm of the Butler County Bar Association.



**Colleen D. Brackovich**  
**Zacharia Brown**

Colleen is a Partner at Zacharia Brown and practices in the areas of Medicaid Planning and Eligibility, Veterans' Benefits, Asset Protection Planning and related Estate Planning and Estate Administration issues. Colleen is admitted to practice law in the Commonwealth of Pennsylvania and before the Pennsylvania Supreme Court. She is also accredited by the Veteran's Administration to represent Veterans in their claims before the Department.

Colleen received her undergraduate degree from the Pennsylvania State University and her law degree from Duquesne University where she was a member of the Women's Law Association, a student member of the Pennsylvania Bar Association, a member of Phi Alpha Delta law fraternity, and the recipient of the 2006 CALI award for excellence in the area of Estates and Trusts. Colleen is a member of NAELA and PAELA. Prior to her legal education Colleen worked at St. Francis Hospital in Pittsburgh and Three Rivers Health Plans in Monroeville, now part of United Health Plans.

Colleen is a frequent lecturer on Elder Law topics and has taught various seminars including continuing education classes for lawyers, accountants, and nursing home administrators. Colleen enjoys speaking to community groups around the Pittsburgh area and can be heard broadcasting for Pittsburgh Elder Law on KDKA 1020 AM every other Saturday at 12:00 noon. Colleen resides in Harrison City with her husband, Dave and two children, Leighton and Cooper.

**“PASSING THE BATON FROM ATTORNEY TO FIDUCIARY: ENSURING THE ESTATE PLAN IS ADMINISTERED AS INTENDED” and “NATIONAL LEGISLATIVE AND REGULATORY UPDATES FROM NAELA”** This session will discuss drafting suggestions from the perspective of a former attorney now fiduciary. Potential inconsistencies will be discussed as well as the impracticality of particular provisions. The job of the attorney doesn't end with the perfect plan. Equally important is the counseling of one's client to ensure they understand and are prepared for the fiduciary relationship. Setting expectations in advance of the plan becoming effective is key to its success. (2 Substantive CLEs for both topics)



**Bridget O'Brien Swartz, Vice President & Fiduciary Counsel  
Mission Management & Trust Co. and current President of NAELA**

Previously, Bridget practiced law, most recently serving as Senior Counsel at the firm of Dyer, Bregman & Ferris, in Phoenix. Mission provides trust & estate services, asset management, and securities custody. Bridget is facilitating the expansion of its footprint in Arizona and developing trust services beyond the traditional to include settlement planning and related trusts such as qualified settlement funds, special needs, and settlement preservation trusts.

She is a Fellow of the American College of Trust and Estate Counsel. In addition to her leadership roles at NAELA, she is involved with the Special Needs Alliance (former President), and Catholic Community Foundation's Professional Advisory Board. She holds a bachelor's degree from Notre Dame, a law degree and master's in public administration from Arizona State University.

Bridget will be speaking as the President of NAELA in addition to her session on Estate Planning.

## **“PENNSYLVANIA STATE LEGISLATION AND REGULATORY UPDATES AS PAELA'S GOVERNMENT AFFAIRS CONSULTANT”**



**Joseph Uliana  
J.M. Uliana & Associates**

Joseph Uliana founded J.M. Uliana & Associates in 2009 after being involved with state government for nearly 20 years. As a former member of the Pennsylvania House of Representatives, a former member of the Pennsylvania State Senate and successful lobbyist, Uliana has demonstrated the ability to use his deep knowledge of state government and public policy to help clients achieve outstanding results.

Prior to founding J.M. Uliana & Associates, Uliana worked for 9 years at the firm of Malady & Wooten.

In the Pennsylvania State Senate, Uliana served as Chairman of the Senate Urban Affairs and Housing Committee, Vice Chairman of the Consumer Protection Committee, Public Welfare Committee, and a member of the Senate Appropriations Committee. Uliana was elected to the Pennsylvania State House as the youngest member of that body, where he served on the House Insurance and Professional Licensure Committees.

In 2014, Governor Tom Corbett appointed Uliana to serve as a member of his Transition Team and the following year Governor Corbett appointed former Senator Uliana to be a Commissioner on the Delaware River Joint Toll Bridge Commission.

Uliana has served on the Board of Directors of East Central Pennsylvania Branch of the Juvenile Diabetes Research Foundation. Uliana is also former member of the Board of Directors of PennVEST, The Pennsylvania Energy Development Authority, the Bethlehem Authority, Lehigh Valley ARC, the AIDS Service Center of the Lehigh Valley, Notre Dame CYO and Hanover Crossing Community Association.

A 1987 graduate of Lehigh University, Uliana presently serves on the Lehigh Football Athletic Partnership's leadership team.

Former Senator Uliana is married to the former Daphne Ratcliffe and they live in Bethlehem, Pennsylvania, with their three children, Nicholas, Sam and Lauren. They are active members of Notre Dame of Bethlehem Church and were the Honorary Co-Chairs of the Parish Center Building program.

In 2015, Uliana was awarded a Mid-Atlantic Chapter Emmy for his work as a Producer on the feature, "The Bethlehem Story".