



Life Care Planning
Law Firms Association

2019 ANNUAL CONFERENCE SCHEDULE OF EVENTS - March 14-16, 2019

Early Bird & Hotel Rates Expire February 8, 2019

Hyatt Place + Hyatt House Charleston/Historic District

560 King Street, Charleston, SC 29403, USA

www.hyattplacehyatthousecharleston.com/



CLICK ON THE LINK BELOW TO BOOK THE GROUP RATE OF \$229/per night

<https://book.passkey.com/go/2019LCPLFAAnnualConference>

Thursday, March 14, 2019

8:00 am - 10:00 am LCPLFA Board of Directors Meeting

Carolina

10:30 am - 12:00 LCPLFA Fundamentals Q&A

Jessamie

1:00 pm - 1:15 pm Welcome/Introductions & Announcements

Grand Magnolia C

1:15 pm - 2:45 pm Opening Keynote

Grand Magnolia C The Intersection of Dementia, Financial Decision Making and Financial Exploitation

In this session we will introduce new financial decision-making tools, research findings and case studies on issues of capacity and exploitation. I will also detail the opportunities for training and use of our new tools available on our website. Attorneys and care coordinators can use these tools with older adults making significant financial decisions.

*Peter A. Lichtenberg, Ph.D., ABPP, Director
The Institute of Gerontology and the Merrill Palmer Skillman Institute
Professor of Psychology Wayne State University
Detroit, MI*

2:45 pm - 3:00 pm Break/Visit with Exhibitors

Grand Magnolia C Foyer

3:00 pm - 4:00 pm General Session II - Rise Above Crime/Elder Abuse

Grand Magnolia C

Emma Parrott

4:00 pm - 4:30 pm Break/Visit with Exhibitors

Grand Magnolia C Foyer

4:30 - 5:30 pm Session III - *Breakout Discussion Groups*

- *Elevator pitch/ Marketing - What is “elevator pitch” when someone asks you to describe LCP?*
- *Procedures/Processes - From start to finish. How do you begin each case?*
- *Tips on Selling Pre-Crisis Life Care Planning Cases*
- *Maintaining Boundaries with Families*
- *Home & Community Based Services (HCBS) Issues (PL & spend down strategies)*
- *How to address more client-centered approaches in SNFs*
- *Schedule of visits - How many visits do you average per case?*

5:30 pm - 7:00 pm Reception - Sponsored by Life Care Consulting LLC

Location TBA

Friday, March 15, 2019

8:00 am - 9:00 am Past President’s Breakfast

Location TBA

8:30 am - 9:00 am Generals Continental Breakfast

Grand Magnolia C

9:00 am - 10:15 am General Session IV

Grand Magnolia C Hot Topics in Medicare



*Judith Stein, Executive Director and Founder
Center for Medicare Advocacy, Inc.
Willimantic, CT*

10:15 am - 10:45 am Break

Grand Magnolia C Foyer

10:45 - 12:00 pm Session V - *Breakout Discussion Groups*

- *Tips for Keeping LCP Clients Happy*
- *Assessments - Which ones do you use the most?*
- *Medicare Advocacy as a Service Line*
- *Marketing to Unsupported Elders/Managing Fiduciary Services in your Firm*
- *Working with Adult Siblings and Difficult Family Dynamic Issues*
- *Efficient Intake Procedures*

12:00 pm - 1:30 pm Lunch/Making the Most of your LCPLFA Membership

Grand Magnolia C

1:30 pm - 2:30 pm General Session VI

Grand Magnolia C Frailty, Aging and How to Help

*Jacobo Mintzer, MD, Professor of Neurology and Psychiatry
Director of the Translational Research Unit, Dept of Neurosciences
Medical University of South Carolina - Charleston, SC*

2:30 pm - 2:45 pm Break

Grand Magnolia C Foyer

2:45 pm - 3:45 pm Session VII - *Breakout Discussion Groups*

- *Advanced Marketing - Effectively Using TV, Radio, Podcasts/Webinars*
- *Deliverables - What are your/your clients favorites?*
- *Triaging an LCP Client*
- *New VA Forms and Policy/Changes & Processes to Accommodate Them*
- *Difficult to Place Clients due to Behavior Programs*
- *ActionStep Case Management Software*

- *The Estate Optimizer: Creating the Ultimate Long-Term Care Plan for your Clients - Louis W. Pierro, Esq.*

Long-term care costs are a looming challenge for clients as they age with chronic illnesses, threatening their quality of life and financial security. Aging Life Care can solve some of the problems, but the funds needed to age in place may not be available. A new way of serving clients who are concerned about long-term care costs is to incorporate hybrid life insurance products into their estate plan, which help fund that care, and when combined with Medicaid or VA Asset Protection Trusts provide a unique solution. In this session, elder law attorney Louis W. Pierro demonstrates how the fusion of insurance and trust planning can provide ultimate flexibility for families, using "The Estate Optimizer."

3:45 pm - 4:00 pm Break

1-Bedroom Suite TBA

4:00 pm - 5:00 pm Session VIII - Breakout Discussion Groups

- *Creative Ways to Handle Fee Refunds*
- *Resources: What are your/your client's favorites?*
- *CECC Stockton Course Past, Present and Future Participants*
- *Helping Clients Navigate Health Insurance after Medicaid Approval*
- *Creating more Opportunities to Work with SNFs*
- *"If I knew then what I know now, I would/would not have....."*
- *The Estate Optimizer: Creating the Ultimate Long-Term Care Plan for your Clients - Continued - Louis W. Pierro, Esq.*

Saturday, March 16, 2019

8:30 am - 10:30 am Continental Breakfast/Session IX

Grand Magnolia C "Turning Point: Every Brain Is at Risk" Film Screening

From the award-winning director of Glen Campbell...I'll Be Me, please join us for a private screening of this film by James Keach and Follow Up Discussion with Executive Producer Nancy Lynn - who also led business development/fundraising for marketing and distribution of the award-winning feature documentary GLEN CAMPBELL...I'LL BE ME. She is currently Senior Vice President, Strategic Partnerships for BrightFocus Foundation, a leading nonprofit funder of research for Alzheimer's disease, macular degeneration and glaucoma. Ms. Lynn received her B.A. in the history of art and architecture from Columbia University (Valedictorian) and her M.A. in the history of art and architecture from the Institute of Fine Arts, New York University.

10:30 am - 11:00 am Break

Grand Magnolia Foyer

11:00 am - 12:00pm General Session III

Grand Magnolia C Technology for Aging

*Sue Levkoff, ScD, MSW
University of South Carolina*

Dr. Sue Levkoff is one of the nation's most prolific scholars in social gerontology. Her work will focus on developing technologies that will enable older adults to remain at home in the community with adequate supports, both for them and their caregivers.

12:00 pm - 1:00 pm Closing General Session/Lunch: Takeaways & Lessons Learned

Grand Magnolia C Foyer

2019 LCPLFA ANNUAL EVENT REGISTRATION FORM

March 14-16, 2019 Charleston, SC

Early Bird Rate Expires February 8, 2019

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| LCPLFA 2019 Registration Information (\$399 for first Registrant) - March 14-16, 2019 | | | | | |
| Name: | | Nickname for Badge: | | | |
| Firm: | | | | | |
| Address: | | | | | |
| City: | | State: | | Zip: | |
| Phone: | | Fax: | | | |
| Email Address: | | Special Diet Request: VEG KOSHER OTHER | | | |
| Additional Registrant #1 (Additional \$299) | | | | | |
| Name: | | Nickname for Badge: | | | |
| Title/Credentials: | | | | | |
| Email Address: | | Special Diet Request: VEG KOSHER OTHER | | | |
| Additional Registrant #2 (Additional \$299) | | | | | |
| Name: | | Nickname for Badge: | | | |
| Title/Credentials: | | | | | |
| Email Address: | | Special Diet Request: VEG KOSHER OTHER | | | |
| Additional Registrant #3 (Additional \$299) | | | | | |
| Name: | | Nickname for Badge: | | | |
| Title/Credentials: | | | | | |
| Email Address: | | Special Diet Request: VEG KOSHER OTHER | | | |
| Registration Fees | | Qty | On/Before Feb 8, 2019 | After Feb 8, 2019 | Total |
| LCPLFA Member Registration - First Member | | | \$399.00 | \$449.00 | \$ |
| Additional Members from Same Law Firm | | | \$299.00 | \$349.00 | \$ |
| Non Member Registration | | | \$650.00 | \$700.00 | \$ |
| <i>Less Applied Discount (if Applicable):</i> | | | | | |
| Total Amount Enclosed | | | | | \$ |
| IMPORTANT - PLEASE COMPLETE!! Topics I would like to discuss with other members are: | | | | | |
| | | | | | |
| Payment Method | | | | | |
| I have enclosed Check # | | for \$ | | | |
| I authorize LCPLFA to charge my MC or VS | | for \$ | | | |
| Card #: | SecCode: | Exp Date: | | | |
| Name: | Signature: | | | | |
| <small>Cancellation Policy No refunds will be issued after March 7, 2019. Cancellations received before that date, will receive a full refund, less at \$50 administration fee. Substitutions are welcome. Cancellation monies not refunded will can be applied toward future education programs</small> | | | | | |

Make check payable to: Life Care Planning Law Firms Association and return with Payment to:
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 Fax: 814-286-3953/E-Mail: admin@lcpfla.org or scott@carlsongroupmgt.com