

## Elder Law and Special Needs Section Annual Meeting

TUESDAY, JANUARY 26, 2016  
New York Hilton Midtown  
1335 Avenue of the Americas, New York City

**EXECUTIVE COMMITTEE MEETING**  
10:00–12:15 p.m.  
Grammercy, 2nd Floor

**COMMITTEE MEETINGS**  
12:15–1:15 p.m.  
Sutton Center, 2nd Floor

**ANNUAL MEETING PROGRAM**  
1:30 p.m.–6:30 p.m.  
Trianon Ballroom, 3rd Floor

**RECEPTION**  
6:30 p.m.–7:30 p.m.  
Rendezvous, 3rd Floor

### IMPORTANT INFORMATION

Under New York's MCLE rule, this program has been approved for 4.0 MCLE credit hours in Professional Practice and 1 credit in Ethics. This program is NOT a transitional program and will not qualify for credit for newly admitted attorneys.

**Discounts and Scholarships:** New York State Bar Association members and non-members may apply for a discount or scholarship to attend this program, based on financial hardship. *This discount applies to the educational portion of the program only.* Under that policy, any member of our Association or non-member who has a genuine basis of his/her hardship, if approved, can receive a discount or scholarship, depending on the circumstances. To apply for a discount or scholarship, please send your request in writing to Lori Nicoll at [Inicoll@nysba.org](mailto:Inicoll@nysba.org) or New York State Bar Association, One Elk Street, Albany, New York 12207. *Written scholarship requests must be received before January 13th.*

**SECTION CHAIR**  
**JULIEANN CALARESO, ESQ.**  
Burke & Casserly, P.C.  
Albany

**PROGRAM CO-CHAIR**  
**ELIZABETH C. BRIAND, ESQ.**  
Bleakley Platt & Schmidt LLP  
White Plains

**PROGRAM CO-CHAIR**  
**JOAN LENSKY ROBERT, ESQ.**  
Kassoff, Robert & Lerner LLP  
Rockville Centre

### 1:30–2:00 p.m. Business Meeting, Elections, Section Awards, Introduction of Program

**JULIEANN CALARESO, ESQ.**  
Section Chair  
Burke & Casserly, P.C.  
Albany

**ELIZABETH C. BRIAND, ESQ.**  
Program Co-Chair  
Bleakley Platt & Schmidt LLP  
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Rockville Centre

**Section Awards**  
**RICHARD A. WEINBLATT, ESQ.**  
Immediate Past Section Chair  
Haley Weinblatt & Calcagni, LLP  
Islandia

### 2:00–2:50 p.m. Annual Elder Law Update - (1.0 credits in Professional Practice)

Latest developments affecting New York elder law practice will be addressed, including an analysis of recent New York case law and an overview of significant legislation and case law affecting the practice of the Elder Law Practice on a national level.

Speaker: **HOWARD S. KROOKS, ESQ.**, Elder Law Associates PA, Boca Raton, FL

### 2:50–3:15 p.m. Special Needs Update (1.5 credit in Professional Practice)

Learn how national and New York State legislation and case law affect your clients with Special Needs. Learn how the ABLE Act may benefit SSI recipients. Learn how the review of Special Needs Trusts affects your clients. Learn about Section 8 housing and Special Needs Trusts. Learn what is new in Pooled Trusts, and get an update on the Special Needs Trust Fairness Act.

Speaker: **ROBERT P. MASCALI, ESQ.**, The Center for Special Needs Trust Administration, Clearwater, FL

### 3:15–3:30 p.m. Refreshment Break

### 3:30–4:45 p.m. Surrogates Court Panel (1.5 credit in Professional Practice)

Learn how surrogates from around the state handle SCPA 17 A Guardianships and applications for Special Needs Trusts. Hear the Surrogates discuss issues such as bonding, annual accountings, budgets, investment discretion and the use of corporate trustees when a SCPA 17 A Guardian applies for the creation of a Special Needs Trust. Hear them discuss proposed amendments to SCPA 17 A.

Moderator: **FRANCES M. PANTALEO, ESQ.**, Bleakley Platt & Schmidt LLP, White Plains, NY

Panelists: **HON. DAVID H. GUY**, Broome County Surrogate's Court Judge, Binghamton, NY  
**HON. PETER J. KELLY**, Queens County Surrogate's Court Judge, Jamaica, NY  
**HON. NELIDA MALAVE-GONZALEZ**, Bronx County Surrogate's Court Judge, Bronx, NY  
**HON. STACY L. PETTIT**, Albany County Surrogate's Court Judge, Albany, NY  
**HON. BRANDON R. SALL**, Westchester County Surrogate's Court Judge, White Plains, NY

**4:50–5:40 p.m. Alphabet Soup: ACA, ABLE, FIDA, MAGI, MLTC, MCO, SNAP:**

**What They Mean For Your Client** (1.0 credit in Professional Practice)

You know the acronyms, but do you know their impact on your clients' lives? Learn how the household size of a MAGI Medicaid household is calculated. Learn how to help your clients enroll in MAGI Medicaid. Can MAGI Medicaid cover home health aides? How is your client's choice of a skilled nursing home affected by MCO and MLTC? What is FIDA?

Moderator: **RICHARD A. WEINBLATT, ESQ.**, Haley Weinblatt & Calcagni, LLP, Islandia, NY

Panelists: **VALERIE J. BOGART, ESQ.**, New York Legal Assistance Group Evelyn Frank Legal Resources Program, New York City

**DAVID GOLDFARB, ESQ.**, Goldfarb Abrandt Salzman & Kutzin LLP, New York City

**RENE H. REIXACH, JR., ESQ.**, Woods Oviatt Gilman LLP, Rochester, NY

**5:40–6:30 p.m. Ethics Panel: What Would You Do If.... Do You Know the Rules?** (1 credit in Ethics)

Try to solve the ethical dilemmas that will be presented to the panel. Match your solutions with the panel's and learn what the rules say.

Moderator: **MICHAEL P. RYAN, ESQ.**, Jaspan Schlesinger LLP, Garden City, NY

Panelists: **CORA A. ALSANTE, ESQ.**, Hancock Estabrook, LLP, Syracuse, NY

**JOSEPH A. GREENMAN, ESQ.**, Bond, Schoeneck & King, PLLC, Syracuse, NY

**DAVID A. SMITH, ESQ.**, Law Office of David A. Smith, PLLC, Garden City, NY

**6:30–7:30 p.m. SECTION NETWORKING RECEPTION — Rendezvous, 3rd Floor**



**Accommodations for Persons with Disabilities:** NYSBA welcomes participation by individuals with disabilities. NYSBA is committed to complying with all applicable laws that prohibit discrimination against individuals on the basis of disability in the full and equal enjoyment of its goods, services, programs, activities, facilities, privileges, advantages, or accommodations. To request auxiliary aids or services or if you have any questions regarding accessibility, please contact Lori Nicoll at 518-487-5563.



**For overnight room accommodations,** please call the Hilton New York at **1-800-445-8667** and identify yourself as a member of the New York State Bar Association. You also can reserve your overnight room on the web at [www.nysba.org/am16ac-comm](http://www.nysba.org/am16ac-comm). Room rates are \$260.00 for single/double occupancy. **Reservations must be made by December 21, 2015.**



To register over the phone, call 800-582-2452 or you can fax registration form to 518-463-5995. For questions about this specific program, please contact Lori Nicoll at 518-487-5563.

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