



October 25-27, 2017
DoubleTree Hilton Silver Spring
8727 Colesville Road
Silver Spring, Maryland 20910
www.ambar.org/NALC

National Aging and Law Conference



Welcome from the Program Chair

Here are four reasons why you should attend the 2017 National Aging and Law Conference:

- Workshops on innovative approaches to critical legal issues
- Breaking news on policy issues
- Cutting-edge workshops on legal service delivery and development
- Networking with top experts from across the country

The American Bar Association Commission on Law and Aging is thrilled to invite you to attend the 2017 National Aging and Law Conference on October 25-27, 2017.

The theme of this year's conference is **Carry it On: Promoting Elder Rights in a New Era**, highlighting the evolving field of aging and the opportunities and challenges facing older Americans.

This year we are at the DoubleTree by Hilton in Silver Spring, Maryland, about a 20 minute subway ride north of the center of Washington DC. The hotel offers spacious and comfortable meeting space, a walkable location, and a very low \$169 per night room rate.

NALC has an agenda of 30 workshops and 4 plenary sessions, over a compact two-day schedule. There are up to five concurrent workshops from which to choose. The main body of the conference includes up to 11.5 CLE credits (including 1 credit of ethics.) A hot buffet lunch is included both Thursday and Friday and a breakfast buffet on Friday. Both days include coffee, tea, water and soft drinks during the day. The Conference Opening Reception, sponsored by the Borchard Foundation Center on Law and Aging, will include light refreshments and an opportunity to network at the end of the afternoon plenary on Thursday.

New this year is an optional pre-conference intensive on Wednesday October 25th focusing on Supported Decision Making and Older Adults (SDM). The agenda includes an overview of the basics of SDM, an update on laws regarding SDM, drafting SDM agreements, a review of the PRACTICAL tool for lawyers, restoration of rights, and legal ethics. Attendance is limited to the first 30 participants. The added cost is \$150 and includes 5.75 CLE credits (including 1.0 credit of ethics,) lunch and all-day refreshments.

We look forward to seeing you in October.

Please feel free to email me with any questions (David.Godfrey@Americanbar.org)

See you soon,

David Godfrey

Senior Attorney and Program Chair, ABA Commission on Law and Aging

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Center for Elder Rights Advocacy

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National Academy of Elder Law Attorneys

National Association of Legal Services Developers (NALSD)

National Association of Senior Legal Hotlines

National Consumer Law Center

The Center for Social Gerontology

The Harry and Jeanette Weinberg Center for Elder Abuse Prevention at the Hebrew Home at Riverdale



Speakers

- Mary M. Aquino, Senior Attorney, Maryland Legal Aid, Baltimore, MD.
- Mary A. Ashkar, Senior Attorney, Willimantic, Connecticut.
- Kelly Bagby, Senior Attorney, AARP Foundation Litigation, Washington, DC.
- Jeremiah Battle, Jr., Staff Attorney, National Consumer Law Center (NCLC), Boston, MA.
- Alethia Battles, JD, LMSW, Michigan Medicine, Ann Arbor, MI.
- Jennifer Berger, Staff Attorney, AARP Legal Counsel for the Elderly, Washington, DC.
- Ali Bers, Staff Attorney, Medicare Rights Center, Willimantic, Connecticut
- Wendy E. Bookler, Legal Director, SeniorLAW Center, Philadelphia, PA.
- Amy Brown, Director of Advocacy and Outreach, New Jersey's I Choose Home Program, NJ.
- Laura Brown, Counsel and State Legal Assistance Developer, Tennessee Commission on Aging and Disability, Franklin, TN.
- Karen Buck, Executive Director, SeniorLAW Center, Philadelphia, PA.
- Linda J. Camp independent consultant, Turning Point Consulting, St. Paul, Minnesota
- Eric Carlson, Directing Attorney, Justice in Aging, Los Angeles, CA.
- Jenica Cassidy, Attorney, Kobrinetz Chernack, LLC, Howard County, Maryland.
- Rita Choula, Senior Advisor, AARP Public Policy Institute, Washington, DC.
- Laura Cook, Esq. Director of the Financial Crime Resource Center and Deputy Director of the National Crime Victim Bar Association, National Center for Victims of Crime, Washington, DC.
- Hillary Dalin, Director of the Office of Elder Justice and Adult Protective Services at the Administration for Community Living in Washington DC.
- Gill Deford, former Director of Litigation, Center for Medicare Advocacy, Willimantic, Connecticut.
- Patrice Earnest Director of the Eldercare Locator, n4a-Washington, DC.
- Toby S. Edelman, Senior Policy Attorney, Center for Medicare Advocacy, Willimantic, Connecticut.
- Emma Fletcher, Director of Scam and Fraud Initiatives, Council of Better Business Bureaus, Washington, DC.
- Keeley Frank, LSW, Senior Services Specialist, National Center for Victims of Crime, Washington, DC
- Jason A. Frank, CELA, CAP, President, Frank & Scherr, LLC., Maryland.
- Kim Glaun, JD. Health Insurance Specialist, Centers for Medicare and Medicaid Services (CMS), Baltimore, Maryland.
- David Godfrey, J.D., senior attorney, American Bar Association Commission on Law and Aging, Washington DC.
- Jennifer Goldberg, Directing Attorney, Justice in Aging, Washington, DC
- David Goldfarb, JD, Senior Public Policy Manager, National Academy of Elder Law Attorneys (NAELA), Vienna, Virginia.
- Fay Gordon JD, Project Manager, Justice in Aging, Oakland, CA.
- Paul Grabowski Consulting Attorney, Center for Medicare Advocacy, Willimantic, Connecticut.
- Tracey Gronniger, Directing Attorney, Justice in Aging, Washington, DC.
- Jessica Hall, JD, Prosecutor, Montgomery County State's Attorney's Office, Maryland.
- Phoebe Rose Hefko, Legal Services Developer, State of Wisconsin Office on Aging, Wisconsin.
- Kathleen Holt, JD, Associate Director, Center for Medicare Advocacy, Connecticut.
- David Hominik, JD, Legal Services Developer, Richmond, Virginia.
- Penelope A. Hommel, M.Sc., Co-director, The Center for Social Gerontology (TCSG), Ann Arbor, Michigan.
- Cora Hume, JD, Senior Policy Analyst, Consumer Financial Protection Bureau, Washington, DC.



Speakers

- Olivia Jerjian, Esq. Equal Justice Works fellow, Legal Counsel for the Elderly, Washington, DC.
- Josephine Kalipeni, Director of Policy and Partnerships, Washington, DC.
- Dani Kaiserman, JD, Bet Tzedek Legal Services, Los Angeles, CA.
- Josephine Kalipeni, Director of Policy and Partnerships, Caring Across Generations, Washington, DC.
- Justice Deborah A. Kaplan, Statewide Coordinating Judge for Family Violence Cases, New York.
- Naomi Karp, J.D., Senior Policy Analyst, Consumer Financial Protection Bureau, Washington, DC.
- Kata Kertesz, JD – Policy Attorney, Center for Medicare Advocacy, Washington, DC.
- Morris Klein, JD, Attorney at Law, Maryland.
- Jennifer Klocinski, Team Lead, U.S. Administration for Community Living (ACL), Washington, DC.
- Catheryn Koss, JD, PhD, Assistant Professor of Gerontology, California State University, Sacramento, California.
- Wey-Wey Kwok, Senior attorney, Center for Medicare Advocacy, Willimantic, Connecticut.
- Kate Lang, JD, Justice in Aging, Washington, DC.
- Eleanor Crosby Lanier, Clinical Professor, University of Georgia School of Law, Athens, GA.
- Joan Levenson, Esq. is Chief of Staff of the Office of the Statewide Coordinating Judge for Family Violence Cases and principal court attorney to Judge Kaplan in the Supreme Court, New York County, NY.
- Malya Levin, Esq. Staff Attorney, Harry and Jeanette Weinberg Center for Elder Abuse Prevention, NY, NY.
- David A. Lipschutz, JD, Attorney, Center for Medicare Advocacy, Washington, DC.
- Karen L. Loewy, Senior Staff Attorney, Lambda Legal, NY, NY.
- Deirdre M.W. Lok, Esq., Assistant Director and General Counsel, The Harry and Jeanette Weinberg Center for Elder Abuse Prevention at the Hebrew Home at Riverdale, NY, NY.,
- Claire McAndrew, Director of Campaign Strategy, Families USA, Washington, DC.
- Dee Mahan, JD, Director of Medicaid Initiatives at Families USA, Washington, DC.
- William C. Marra, Attorney, Cooper & Kirk PLLC in Washington, D.C.
- Jack L. Marshal, JD, President and Founder of ProEthics, Ltd., Alexandria, VA
- Jonathan Martinis, JD, Senior Director for Law and Policy for The Burton Blatt Institute at Syracuse University, Syracuse, NY.
- James McSpadden, Senior Legislative Representative, AARP Government Affairs, Washington, DC.
- Suzanne E. Messenger, JD, West Virginia State Long-term Care Ombudsman, Charleston, WV.
- Sheryl R. Miller, Esq. Pro Bono Manager, AARP Legal Counsel for the Elderly (LCE), Washington, DC.
- Anne Montgomery Deputy Director, Altarum Institute, Washington, DC.
- Keith L. Morris, J.D., M.P.A., President, Elder Law of Michigan, Lansing, MI.
- Maria R. Motsavage Registered Nurse and Licensed Nursing Home Administrator, Broome County, NY.
- Gwen Orłowski, JD, Central Jersey Legal Services, NJ.
- Mary Ann Parker, Staff Attorney, D.C. Long-Term Care Ombudsman Program/Legal Counsel for the Elderly, Washington DC.
- Rubens Pessanha PhD, senior director, Council of Better Business Bureaus, Arlington, VA
- Marit Anne Peterson, program director, Minnesota Elder Justice Center, Minnesota.
- Dari Pogach, Staff Attorney, ABA Commission on Law and Aging, Washington, DC.
- Patricia Poss, JD, attorney in the Division of Marketing Practices in the Federal Trade Commission's Bureau of Consumer Protection, Washington, DC.
- William (Bill) Alvarado Rivera, Senior Vice President for Litigation at AARP Foundation, Washington, DC.
- Jack L. Rives, JD, Executive Director, American Bar Association, Chicago, IL.



Speakers

- Jennifer Marshall Roden, JD, Associate Attorney, Craige & Fox, PLLC, Wilmington, NC.
- Don Saunders, JD, Vice President for Civil Legal Services, National Legal and Defender Association, Washington, DC.
- Murray Scheel, Senior Staff Attorney, Whitman-Walker Health, Washington, DC.
- E. Percil Stanford PhD, President of Folding Voice LLC, Washington, DC.
- Judith Stein, Esq., Executive Director, Center for Medicare Advocacy, Willimantic, Connecticut.
- Lori Stiegel, Senior Attorney, ABA Commission on Law and Aging, Washington, DC.
- Andrew Strickland, JD., Deputy Director of Federal and State Legislative Relations, American Psychiatric Association, Washington, DC.
- Aaron Tax, JD, Director of Federal Government Relations, Services & Advocacy for GLBT Elders (SAGE), Washington, DC.
- Dr. Jane Tilly, Senior Policy Advisor, U.S. Administration for Community Living (ACL) Washington, DC.
- Maria Town Director of the Mayor's Office for People with Disabilities for the City of Houston, Houston, TX.
- Peter N. Travitsky, Staff Attorney, Evelyn Frank Legal Resources Program at New York Legal Assistance Group (NYLAG), NY, NY.
- Rebecca Vallas, JD, Managing Director, Center for American Progress, Washington, DC.
- Omar Valverde, JD, Aging Program Specialist, U.S. Administration on Aging, Washington, DC.
- Edwin Walker, JD, Deputy Assistant Secretary for Aging, Administration on Aging (AoA), Washington, DC.
- John Whitelaw, Supervising Attorney, Community Legal Services, Philadelphia, PA.
- Morgan Whitlatch, JD, Legal Director, Quality Trust for Individuals with Disabilities, Washington, DC.
- Odette Williamson, Staff Attorney, National Consumer Law Center, Boston, MA.
- Daniel Rutherford Wilson, Director of Federal Affairs, PHI, Washington, DC.
- Lisa Weintraub Schifferle, Attorney, Federal Trade Commission, Washington, DC.
- Erica F. Wood, JD, Assistant Director, ABA Commission on Law and Aging, Washington, DC.
- Beverly Yang, JD, Policy Analyst, Consumer Financial Protection Bureau, Washington, DC.

5.75 hours of CLE, including 1 hour of ethics

Additional fee of \$150 includes CLE credits, Lunch and all day coffee and soft drinks

Registration is limited to 30 attendees.

Leadership Room	SMD Defined	Status of the Law	Practice Tools	Post Decision	Legal Ethics and SMD
9:00 -9:30 AM	9:30 – 10:30 AM	10:45 - Noon	1:00 – 2:15 PM	2:15 – 3:00 PM	3:15 – 4:15 PM
Welcome, introductions, overview of SDM, goals for the day	Defining SDM and older adults, integrating SDM into advance care planning	Legal Update: SDM statutes, SDM agreements and other documents	PRACTICAL tool kit for lawyers, reviewing all alternatives to guardianship	Restoration of rights: modification and termination of guardianship	Legal ethics and SDM, balancing the role of advocate with best interest
David Godfrey	David Godfrey and Morgan Whitlach	Jonathon Martinis	Dari Pogach and Erica Wood	Karen Campbell and Jenica Cassidy	David Godfrey Jonathon Martinis
	10:30-10:45 Break	Noon – 1:00 Lunch – included in pre-conference fee		3:00 – 3:15 Break	4:15 Adjourn

Collaboration Room

National Association of Legal Service Developers Symposium

By invitation only – agenda forthcoming

Pinnacle Grand Ballroom	Discovery	Connection	Inspiration A	Inspiration B
Registration / Check in 8:00AM–5:00PM				
Coffee and Tea Only 8:30AM–9:30AM				
9:30AM–10:30AM Legal Ethics and the Older Client	9:30AM–10:30AM Bridging the Legal Services and Aging Network: National Center on Law and Elder Rights	9:30AM–10:30AM Advocating for Older Adults who have Experienced Trauma	9:30AM–10:30AM Elder Abuse in Guardianship Cases: Best Practices for Identification and Intervention	9:30AM–10:30AM Preserving Elders' Income and Assets Using Consumer Protection Laws
<p>Legal Ethics and the Older Client is an intense challenging session that examines current ethics issues that may face lawyers in this important field, such as...ability, disability, and Rule 1.14, advising older clients, attorney competence, technology traps with the technologically inept client, when families interfere...and more.</p> <p><i>Speaker:</i></p> <ul style="list-style-type: none"> • Jack Marshall 	<p>The legal services and aging network share the privilege and responsibility of promoting elder rights. When they work together, outcomes for clients improve, but they can be siloed. The National Center on Law and Elder Rights (NCLER), supported by the Administration on Community Living (ACL) and developed by Justice in Aging, aims to bridge the two through resource support. This workshop will explore effective strategies to maximize communication and partnership between the aging and legal services network.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Jennifer Goldberg • Fay Gordon • Omar Valverde 	<p>Trauma and aging affect the brain in particular ways, and advocates and attorneys may face unique challenges in assisting such clients. Briefly, we will discuss the neurobiology of trauma, and issues that may affect older adults' cognitive functioning (effects of aging on the brain, Alzheimer's disease, and dementia). Given this research, we will provide an overview of practices that delineate how to best advocate for older adults who have experienced trauma.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Laura Cook • Keeley Frank 	<p>Elder abuse is often the impetus for the initial filing of a guardianship case or is unearthed during the investigation accompanying the proceedings. Where an older adult has significant cognitive limitations, guardianship proceedings can be a powerful mechanism to identify elder abuse and intervene. In this session, participants will learn about tools available during and after a guardian's appointment to maintain an older adult's security and independence and to identify or even recover an abuser's ill-gotten gains. Attendees will also gain an understanding of the best practices and remedies available when a guardian is suspected of abuse.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Jennifer Berger • Malya Levin • Deirdre Lok 	<p>There are many legal tools available to help elders with limited income and assets address increasing and unexpected debt. With the cutbacks in the social safety net, elders will be assuming more financial responsibilities and accruing more debt. This session will review the consumer protection laws that advocates can use to assist elders in financial distress, including state and federal exemptions laws, the Fair Debt Collection Practices Act and bankruptcy law.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Jeremiah Battle • Odette Williamson
Break 10:30AM–10:45AM				

Pinnacle Grand Ballroom	Discovery	Connection	Inspiration A	Inspiration B
<p>10:45 – Noon Protecting The Safety Net</p>				
<p>Medicare, Medicaid, Social Security, SSI and legal services are all crucial programs to help older adults age in dignity. However, each of these programs faces uncertainty and possible changes as we look back at 2017 and ahead to 2018. The panel will highlight efforts to protect and strengthen the programs and protections their clients rely on, and how you can make a difference in your community.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Rebecca Valles • Don Saunders • Claire McAndrew 				
<p>Lunch</p> <p>Pinnacle Grand Ballroom</p> <p>12:00PM–1:00PM</p>	<p>Discovery Room: III-B Funded Legal Assistance Convening</p> <p>Attention III-B legal assistance program folks- you are invited to come gather at two lunch-fueled opportunities to meet, greet and share with your peers from around the country and your ACL colleagues about your unique experiences in III-B legal programs. We'll open a dialogue among us about the substantive and programmatic issues you care most about, including the ones that keep you up at night. For more information, please contact Omar Valverde, (202) 795-7460 - omar.valverde@acl.hhs.gov and Hilary Dalin, (202) 795-7468 - Hilary.dalin@acl.hhs.gov.</p>			
<p>1:00PM–2:00PM</p> <p>Nursing home transitions: Success Through Collaborative Advocacy</p>	<p>1:00PM–2:00PM</p> <p>State Policy Advocacy to Achieve Systemic Results</p>	<p>1:00PM–2:00PM</p> <p>LGBT Elders and the Public Benefit Safety Net</p>	<p>1:00PM–2:00PM</p> <p>Home Improvement Scams: Trends, Tips & Tools</p>	<p>1:00PM–2:00PM</p> <p>Partnerships That Preserve Low - Income Seniors' Rights through Corporate Engagement</p>
<p>This workshop will provide an overview of New Jersey's experience with nursing home transitions through its Money Follows the Person program, and the various legal issues the program has encountered (e.g. guardianship, residents' rights, MCO contract issues, landlord-tenant). The presentation will also focus on collaborative efforts between the MFP program and Legal Services to address these issues, with an emphasis on utilizing the federal HCBS person-centered planning rules to achieve positive results.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Amy Brown • Gwen Orlowski 	<p>State policy advocacy can produce powerful long-term results for seniors. Collaborations are key to achieving significant changes in state agency policies and laws. Pro bono projects can help identify best practices to emulate, craft persuasive policy arguments, and draft legislative proposals and letters to agencies. State AARP offices are wonderful partners for lobbying for legislation that will benefit seniors. Come hear our success stories and share your own tips for leveraging resources and marshalling allies to accomplish systemic reform.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Karen Buck • Mary Ann Parker 	<p>Aging presents special challenges for LGBT individuals, not least of which are the legal challenges they may face regarding public benefits: Medicare Parts A, B and D; Social Security benefits (disability, retirement); Medicaid; Qualified Medicare Beneficiary; Low Income Subsidy for Medicare Part D; long term care (nursing home); and veterans benefits. This program will provide participants with an overview of the federal and state programs regarding these matters, and recent developments.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Karen Loewy • Murray Scheel • Aaron Tax 	<p>Home improvement scams threaten older adults' financial stability. Learn more about a Better Business Bureau report finding them to be the riskiest scam based on exposure, susceptibility and loss. Then, hear from the FTC and N4A about how to reduce the risk of home improvement scams, what a home improvement scam is, why older adults are targeted, and what to do if someone has been scammed. Finally, try your hand at hypothetical scenarios.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Patrice Earnest • Rubens Pessanha • Lisa Weintraub Schifferle 	<p>As the number of at-risk seniors is increasing steadily, Legal Counsel for the Elderly has engaged in innovative corporate partnerships to preserve seniors' rights and basic needs. This session demonstrates ways to : 1) advocate for these tenants, including building a referral system with the local Public Housing agency, based on LCE's corporate-sponsored Voucher Preservation Project; and 2) leverage the resources of law firms and corporations to preserve senior's basic needs through legal clinics.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Olivia Jerjian • Sheryl R. Miller

Pinnacle Grand Ballroom	Discovery	Connection	Inspiration A	Inspiration B
Break 2:00PM–2:15PM				
2:15PM–3:30PM Wait, Wait Don't Tell Me – Medicare Hot Topics	2:15PM–3:30PM Combatting Improper Billing of Qualified Medicare Beneficiaries (QMBs)	2:15PM–3:30PM Protection and Recovery for Cognitively Impaired Victims of Financial Elder Abuse	2:15PM–3:30PM Overcoming Challenges to Accessing Public Benefits for People with Dementia	2:15PM–3:30PM Maximizing Elder Rights Protection in a New Era Through Model Approaches
<p>In a fast-paced forum, a panel of experts will discuss the latest Medicare news, challenges and successes for beneficiaries. There will be plenty of opportunity for audience participation, questions and answers. Join us for a fun and informative session.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Mary Ashkar • Ali Bers • Gill Deford • Toby Edelman • Paul Grabowski • Kathy Holt • Kata Kertesz • Wey-Wey Kwok • David Lipschutz • Judy Stein 	<p>Qualified Medicare Beneficiaries (QMBs) and other dual eligibles are protected from billing for covered Medicare services, but too often, providers improperly bill them anyway. As a result, low-income seniors face unaffordable bills that they cannot and should not pay. Join us to hear from CMS and advocates how they are addressing this longstanding problem. You will learn new ways you can take action and protect low-income older adults from this illegal practice.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Jennifer Goldberg • Kim Glaun • Peter N. Travitsky 	<p>This session will educate attendees on immediate interventions for victims of financial elder abuse who have dementia and other cognitive impairments. From prevention to protect the elder's financial status to pursuing civil or criminal remedies, the session will discuss working with banks and financial institutions, estate planning, reporting abuse, restraining orders, collaborating with government agencies and multi-disciplinary taskforces, and other civil and criminal remedies.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Dani Kaiserman • Jessica Hall • Jennifer Marshall Roden 	<p>People with cognitive impairments can experience significant barriers in accessing essential safety net programs such as Social Security, SSI, and Medicaid. Knowing the ins and outs of these programs can help overcome these barriers. Join us to learn how to navigate public benefits programs and advocate on behalf of people with dementia to improve their economic security and access to health care.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Mary M. Aquino • Eric Carlson • Kate Lang 	<p>In this new era, it is more critical than ever that legal assistance and elder rights protection systems effectively reach and serve vulnerable elders. Model Approaches to Statewide Legal Assistance projects provide excellent laboratories for systems-level change. Two 2016 Phase I and one Phase II grantees will describe their efforts to assess and strengthen legal assistance within their state aging networks and their visions for the future. Facilitated by AoA/ACL and The Center for Social Gerontology.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Laura Brown • Phoebe Hefko • David Hominik • Penelope A. Hommel • Omar Valverde
Break 3:30PM–3:45PM				

Pinnacle Grand Ballroom	Discovery	Connection	Inspiration A	Inspiration B
3:45PM–5:00PM Caregivers and the Aging Network				
<p>How can legal services and the aging network help current caregivers as well as creating an environment to better support caregivers in the future? Panelists will share ideas to strengthen home and community-based services to better support caregivers so that they can continue to provide the care on which older adults rely. Join us to learn about innovations at the local, state and national level.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Rita Choula • Josephine Kalipeni • Anne Montgomery • Edwin Walker 				
Opening Reception 5:00PM–6:00PM	National Association of Senior Legal Hotlines – Annual Meeting – Open to anyone interested. 6:00PM–7:00PM			

Pinnacle Grand Ballroom	Discovery	Connection	Inspiration A	Inspiration B
Registration / Check in 8:00AM–4:15PM				
Hot Breakfast Buffet 7:30AM–8:30AM				
8:30AM–9:45AM - Rapid-Fire Plenary - Pinnacle Grand Ballroom				
<p>Join us for this fast-paced session featuring multiple presentations in rapid succession.</p> <p>Introduction by Jack Rives, Executive Director American Bar Association</p> <ul style="list-style-type: none"> • Findings and Recommendations in Clinical Practice and Health Care Decision Making Laws - David Godfrey • Enhancing your Elder Law Practice with an Elder Care Coordinator - Maria R. Motsavage • Financial Exploitation Task Forces: Success for Less - Suzanne Messenger • Fighting Fraud Affecting the Next Generation of Aging Consumers - Patti Poss • Links Between Race Disparities in Advance Care and Estate Planning - Catheryn Koss, JD, PhD • Practical and Legal Barriers to Tailoring Guardianship Orders: Results of a Multi-faceted Research Project - Ellie Lanier • Global Journeys in Elder Justice - Karen C. Buck <p>Closing remarks by the Assistant Secretary for Aging, Lance Robertson</p>				
Break 9:45AM–10:00AM				

Pinnacle Grand Ballroom	Discovery	Connection	Inspiration A	Inspiration B
10:00AM–11:00AM The Future of Medicare and Medicaid	10:00AM–11:00AM Stretching the Money: Low-Cost Legal Service Delivery Mechanisms	10:00AM–11:00AM Strategies for Challenging Excessive Drug Prices	10:00AM–11:00AM Principles for Person-directed Services During Serious Illness	10:00AM–11:00AM Understanding Resources in the Supplemental Security Income (SSI) Program
<p>What is the future of Medicaid and Medicare? How will new federal leadership affect these lifeline programs? Members of Congress receive briefings about the latest developments on Capitol Hill and at CMS, now it's your turn. Join us to hear about current risks to Medicaid and Medicare from the Washington, D.C. perspective, and how any potential federal changes would affect the older adults you serve. Share how federal changes are already affecting your clients.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Jennifer Goldberg • David A. Lipschutz 	<p>In this time of funding uncertainty, programs must look for new and unique ways to deliver services and to ensure that services are adequately addressing those in need. This workshop will highlight several different low cost programs being utilized throughout the country including: hotlines, community legal clinics, pro bono practice groups, and court-based help centers.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Wendy E. Bookler • Karen Buck • Keith Morris 	<p>This workshop will discuss the phenomenon of persistent increases in the prices of prescription drugs critical to consumers' continued health. The presentation will provide a brief overview of claims frequently used to challenge high drug prices, a broad overview of recent case law affecting these claims, AARP research on the historic increase in branded and generic drugs, and state level attempts to rein in costs to consumers.</p> <p><i>Speakers</i></p> <ul style="list-style-type: none"> • William Marra • James McSpadden • Andrew Strickland 	<p>People should be able to choose how they live with serious illness, but many lose choices as they age. ACL, with stakeholders from both aging and disability advocacy communities, developed person-directed principles to promote choice during serious illness. The principles address supports for people who are seriously ill and their family caregivers. Advocates can use the principles to help people exercise their rights and improve program services. The principles evolved from research and stakeholder discussions.</p> <p><i>Speakers</i></p> <ul style="list-style-type: none"> • Kelly Bagby • Dari Pogach • Jane Tilly 	<p>The Supplemental Security Income (SSI) Program has many complicated financial eligibility rules, including the treatment of resources or assets. We will discuss these rules concerning resources, and explore some of the more common resource problems for clients on SSI, including homes where the recipient is not currently living, lump sum settlements, and inheritances. We will also cover the transfer of asset penalty and strategies for dealing with it, including the undue hardship exception.</p> <p><i>Speakers</i></p> <ul style="list-style-type: none"> • Kate Lang • John Whitelaw

Break | 11:00AM–11:15AM

11:15AM–12:15PM - Plenary - "Civil Rights and Older Adults" Pinnacle Grand Ballroom

Understanding historic and systemic racial injustice and discrimination against LGBT individuals, individuals with disabilities, and older workers is an important component of robustly advocating for and serving older adults. This panel will dive into racial justice, disability rights, LGBT protections and ageism to explore ways that legal services can protect civil rights for older adults and best serve diverse populations.

Speakers:

- Bill Rivera, JD
- Aaron Tax
- Maria Town
- Percil Stanford

Pinnacle Grand Ballroom	Discovery	Connection	Inspiration A	Inspiration B
<p>Lunch 12:15PM–1:15PM</p> <p>Discovery Room: III-B Funded Legal Assistance Convening - see full description on page 4</p>				
<p>1:15PM–2:30PM</p> <p>Play CFPB Jeopardy Latest tools for older consumers and advocates</p>	<p>1:15PM–2:30PM</p> <p>DATA = UNDERSTANDING: Discussing New ACL Legal Services Reporting Requirements</p>	<p>1:15PM–2:30PM</p> <p>Legislative Update on Social Security and SSI</p>	<p>1:15PM–2:30PM</p> <p>Building a Late Life Decision Making Infrastructure for People Aging Alone</p>	<p>1:15PM–2:30PM</p> <p>The Intersectionality of Race, Gender, and Immigration Status in Long-term Care</p>
<p>ANSWER: This federal office is always developing new tools to help you protect older consumers.</p> <p>QUESTION: What is the Consumer Financial Protection Bureau’s Office for Older Americans? Join a lively session on how CFPB is:</p> <ul style="list-style-type: none"> • Helping banks and credit unions prevent elder financial exploitation • Shedding light on older consumers and student loan debt • Helping consumers make informed decisions about reverse mortgages • Supporting community networks that fight scams and exploitation • Advising consumers experiencing wrongful collection of medical debt <p>And more!</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Cora Hume • Naomi Karp • Beverly Yang 	<p>As ACL finalizes expanded national reporting on OAA legal services, come hear the latest on the planned changes. Be part of the conversation on how these changes will affect legal providers, AAAs and SUAs. Help brainstorm holistic and effective approaches – involving all levels of the delivery system – to implementing new requirements. Consider how changes will assist to “tell the story” of OAA legal services and its critical role in ensuring justice for vulnerable elders.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Hilary Dalin • Penelope Hommel • Jennifer Klocinski 	<p>This session will provide an update on proposals in Congress that would adversely impact Social Security and the Supplemental Security Income (SSI) program, as well as improvements to Social Security and SSI that have been introduced at the state and federal level.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Tracey Gronniger • Kate Lang 	<p>Talking about the last life chapters isn’t easy for anyone, but it is especially difficult for “solos;” older adults who lack the traditional family support structure. When crafting wills, trusts, Powers of Attorney and Advance Care Directives, members of this group struggle with who to designate as a surrogate. Solos “with capacity,” are a largely invisible but growing group. Help discuss needs and generate ideas about how to create the infrastructure that they need.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Linda J. Camp • Marit Peterson 	<p>Diverse low-income older adults experience significant barriers to accessing long-term care. At the same time, many low-income women of color, frequently immigrants, are providing home care but are unable to access affordable care themselves. This session will address both national and state level policy level initiatives that value the work of caregiving, expand access to home care options and ensure that solutions are inclusive and reduce inequities based on race, gender and immigration status.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> • Jennifer Goldberg • Josephine Kalipeni • Aaron Tax • Daniel Wilson
<p>Break 2:30PM–2:45PM</p>				

Pinnacle Grand Ballroom	Discovery	Connection	Inspiration A	Inspiration B
2:45PM–4:00PM The Need for Remote Protection Orders for Older Victims of Domestic Violence	2:45PM–4:00PM Access to Long-Term Services and Supports: The Potential (Mis)use of Medicaid Waivers and the Path Forward on Financing Coverage	2:45PM–4:00PM What's Next for Long Term Care Facilities? Recent and Future Changes	2:45PM–4:00PM What's Hot in Guardianship: Learn the Latest and Fly with WINGS	2:45PM–4:00PM Interdisciplinary Collaboration: The Successful Convergence of Law and Social Work
<p>This workshop introduces New York's Remote Access Temporary Order of Protection Program, the first statewide program allowing domestic violence victims to obtain protection orders electronically from remote locations. The presenters, using case studies, will also discuss murder and murder-suicides cases involving older couples which often aren't investigated as domestic violence homicides, despite the presence of abuse in the relationship. This phenomenon underscores the importance of older victims obtaining protection orders which include weapon surrender.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> Hon. Deborah A. Kaplan Joan G. Levenson, Esq. 	<p>The United States lacks a comprehensive system for long-term services and supports (LTSS). Today, Medicaid acts as the primary payor of LTSS. Demonstration waivers offer an opportunity to improve the system. At the same time, beneficiaries face the risk that states will use these waivers under the new Administration to further restrict access to the program. Meanwhile, the market for long-term care insurance has faltered with many insurers exiting the market. Learn what think tanks and other stakeholders have proposed to fix our broken LTSS system.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> Jason Frank David Goldfarb Morris Klein Dee Mahan 	<p>Both nursing facilities and assisted living facilities are experiencing changes in governing law. Nursing facilities are subject to revised federal regulations; most of the regulations are newly-implemented, although others will not become effective until November 2017 or November 2019. Medicaid-reimbursed assisted living facilities also are in transition. Relevant Medicaid regulations on community-based settings will become effective in March 2019. Join us to learn how these new rules could be implemented in your individual state.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> Eric Carlson Toby Edelman 	<p>Hear a national overview on 2017 state guardianship legislation; consider the complex trade-offs in balancing communication and visitation rights with risk of harm; learn about the extent of, and remedies for, financial exploitation by conservators; and get a bird's eye view of state innovations through WINGS – Working Interdisciplinary Networks of Guardianship Stakeholders. This fast-paced session will engage the audience in addressing challenges facing guardianship reform.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> Dari Pogach Erica Wood Lori Stiegel 	<p>Integrating core social work and legal principles has proven to be an invaluable asset in long-term care planning for aging patients. The presenters will discuss two interdisciplinary programs, one in a hospital setting and one in a legal setting. Michigan Medicine addresses complex patient care issues requiring the convergence of social work and law. The Alternatives to Landlord/Tenant Court for the Elderly Project at AARP Legal Counsel for the Elderly in DC, is a social work/legal eviction prevention collaborative focusing on early intervention to help at-risk elders age in place through social work assessments and interventions, protective arrangements, and legal interventions.</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> Alethia J. Battles Jennifer Berger

Four Easy Ways to Register	Course Materials
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2017 National Aging and Law Conference Registration Rates:

	List Price	ABA Member Rate	ABA Co-Sponsor Section and Division members	Legal Services Corporation funded, OAA Title III, legal aid, nonprofit, public interest, or government staff
Early until 8/25/2017	<input type="checkbox"/> \$625	<input type="checkbox"/> \$525	<input type="checkbox"/> \$475	<input type="checkbox"/> \$425
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Late 9/25 and onsite	<input type="checkbox"/> \$725	<input type="checkbox"/> \$625	<input type="checkbox"/> \$575	<input type="checkbox"/> \$525

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Conference Speakers

For a complete list of speakers and detailed speaker bios, please see:

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