NAELA
National Academy of Elder Law Attorneys

NAELA Annual Conference: The Best Online

Wednesday, October 29, 2025 (Day 1)

1:00-1:10 p.m. Program Kick-Off: What to Expect; Housekeeping

1:10-2:10 p.m. **Kruse Ethics Lecture - Navigating Elder Law Ethics in the Age of AI: Innovate with Confidence** *(Speaker: Rebecca A. Hobbs, CELA)*

In this session, you'll gain practical insights into the ethical challenges of using AI in your practice. Explore the innovative tools you can implement to enhance your work, while learning how to navigate the ethical complexities they bring. We'll also cover ABA Formal Opinion 512, highlighting the ethical duties you and your firm must uphold when it comes to AI, including maintaining competency and protecting client information.

2:15-3:15 p.m. **Long-Term Care Insurance: How it Works and How to Claim Successfully** *(Speaker: Stana Martin)*

The long-term care insurance industry has its own unique vocabulary and processes. This session is designed for experienced attorneys who want to master the nuances of long-term care policies or for those aiming to train paralegals in this area. Attend this session to learn how to interpret an LTC contract and effectively counsel your clients on how and when to file a successful claim.

3:15-3:30 p.m. **Networking Break**

3:30-4:30 p.m. **All Things CCRC!** (Speaker*: Katherine C. Pearson, Penn State Dickinson School of Law)*

Explore Continuing Care Retirement Communities (CCRCs) as a comprehensive solution for aging in place and financing long-term care. This session will provide you with insights into CCRC housing options, available services, and financial models. You'll also learn key advocacy strategies for navigating CCRC contracts and selecting the right community. "All Things CCRC" will equip you to identify critical issues and effectively counsel clients on this important long-term care option.

4:30 p.m. **Program Wrap-up**

Tuesday, November 4, 2025 (Day 2)

1:00-1:10 p.m. Day 2 Kick-Off

1:10-2:10 p.m. **Tools and Lessons Learned from the Bankruptcy of a Professional Trustee** (*Moderator: Roberta K. Flowers, Fellow, with panelists: Peter J. Wall, Fiduciary Services, and Mark D. Munson, CELA, CAP)*

Through the analysis of recent cases, this expert panel will explore the bankruptcy of a professional trustee. You'll gain practical insights into key trust provisions, warning signs of trust instability, immediate and long-term impacts on beneficiaries, and strategic approaches for recovery when these vital instruments fail. This session is essential for attorneys who advise professional or lay-person trustees or work with pooled trust organizations, offering both practical guidance and critical analysis of the lessons learned from current challenges.

2:15 – 3:15 p.m. **Estate Planning for Anticipated Will Contest** *(Speaker: Bruce R. Moen)*

Gain practical insights on how to strengthen the future defense of a will when litigation against the estate plan is foreseeable. While there is no universal approach to prevent will contests, effective drafting and other techniques can help you build a stronger defense, making it harder for challengers to gain traction in court.

3:15-3:30 p.m. **Networking Break**

3:30 – 4:30 p.m. **Advanced Medicaid Compliant Annuity** *(Speaker: Jim Wolverton)*

Using advanced case studies, this in-depth session will explore scenarios for both married couples and single clients, including spend-down approaches when both spouses are applying for Medicaid, how to handle a client already on Medicaid who receives a lump sum like an inheritance, and when to implement gifting strategies for a community spouse. Attend to gain a deeper understanding of how Medicaid compliant annuities can be used to help clients in both traditional and unique scenarios.

4:30 p.m. **Program Wrap-Up**