



**MAY 8 & 9**

*Trusts Workshop May 7*

**BELLEVUE/SEATTLE**

# 2025 NAELA Annual Conference Proposal

[Insert Your Name]

[Insert Date]

# In-Person Meeting Benefits

## **Networking Opportunities**

- Face-to-face interactions allow for more meaningful connections. You can build relationships, exchange ideas, and collaborate with peers and industry leaders.

## **Engaging Discussions**

- In-person meetings often foster more dynamic and engaging discussions. You can participate in real-time Q&A sessions and side discussions.

## **Inspiration and Motivation**

- Being in a room with other professionals can be incredibly inspiring. It can reignite your passion for your work and motivate you to achieve your goals.

## **Career Advancement**

- Demonstrating your commitment to professional development by attending these events can enhance your resume and open up new career opportunities.

## **Social Interaction**

- The chance to interact socially, share meals, and enjoy informal conversations can be refreshing and rewarding.

## **Immediate Feedback**

- You can receive immediate feedback on ideas and topics, which can be more nuanced and constructive.

## **Building Trust**

- Face-to-face interactions help build trust and rapport more effectively than virtual meetings.



# Program Details

- NAELA Annual Conference
  - May 8 - 9, 2025 (Thursday - Friday)
  - The nation's premier conference for elder and special needs law attorneys
- Pre-Program Trust Education
  - Mastering Complex Trusts
  - May 7, 2025 (Wednesday)
- Details and Registration
  - [www.NAELA.org/Annual\\_Conference](http://www.NAELA.org/Annual_Conference)

# Mastering Complex Trusts

(remove slide if not attending)



## One-Day Agenda:

- Session 1- Revocable Living Trusts With Pour-Over Wills
- Session 2 - Irrevocable Income-Only Trusts
- Session 3 - The Intersection of Trusts and Retirement Accounts
- Session 4 - Third-Party Special Needs Trust
- Session 5 - First-Party (Self-Settled) Special Needs Trusts presented
- Session 6 - Q & A With Presenters Panel

# NAELA Annual Conference Sessions

- Train Your Memory – Conference Kickoff Presentation
- Navigating Elder Law Ethics in the Age of AI: Innovate With Confidence
- All Things CCRC!
- Privacy in the Public Eye: Managing Third-Party Interest in Guardianship Matters
- Today's Policy Changes Affecting Your Practice
- Medicaid Divorce: For Better, for Worse, but Not for the Nursing Home
- LegalTech Strategies to Maximize Your Practice's Operational Profitability
- An Update on Current and Potential Changes in Estate and Gift Tax Planning
- Advanced Medicaid Compliant Annuity Case Studies
- Tools and Lessons Learned From the Bankruptcy of a Professional Trustee
- Long-Term Care Insurance: How it Works and How to Claim Successfully
- Case Law Update

# Conference Sessions, cont.

- ILITs 101
- Helping Your Clients Detect and Avoid Common Scams
- VSED: A Legal, Viable, and Peaceful End-of-Life Option
- Two Roads to Trust Administration: Family Trustees vs. Professional Management
- Unlocking the Door to Independence: Housing Issues for People With Disabilities
- What to Do With Trusts Signed Prior to the SECURE Act?
- Estate Planning for an Anticipated Will Contest
- Roots and Roofs: Protecting Black Family Legacies Through Estate Planning
- Maximizing Inherited IRA SNTs
- Ensuring Peace of Mind When Planning for Adult Children With Disabilities
- Deep Dive on Deeds
- Technology in Finance: Leveraging Tools to Save Time and Money

# Presenter Demographics

- 34 presenters
  - 7 CELAs
  - 4 Fellows
  - 4 CAPs
  - 2 Professors of Law/1 PhD
  - 2 LICSWs
  - 1 Assistant U.S. Attorney

# Networking Opportunities

- Hundreds of elder and special needs law attorneys
  - Collaborate with a large, geographic cross-section of members in the U.S.
  - Participate in a rich exchange of ideas and information
- Networking breaks & lunches
- Welcome reception
- Dine-a-rounds

**95% of people agree that  
better business  
relationships are built  
through face-to-face  
meetings.**



# Budget

- \$855\* - Annual Conference Package
  - 24 sessions + materials over 2 days
  - CLE: 10.30 total hours (8.30 general hours + 2.0 ethics)^
  - Thursday lunch + evening reception
  - Friday continental breakfast + lunch
  - Professional session recordings post-conference
- \$460\* - Trust Package (Remove if not attending)
  - 6 sessions
  - CLE: 6.55 general hours^
  - Networking breakfast + lunch

\*NAELA member price by early bird deadline March 31, 2025

^NAELA will be filing for continuing legal education (CLE) credit in all mandatory CLE states. Each state has different rules and regulations, so approvals will vary from state to state and credit hours will vary.



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