


BS&K Breakfast Briefing

Eldercare Planning: Practical Issues and Ethics

Co-Sponsored By
The Foundation at Menorah Park
and
The Jewish Community Foundation of CNY

September 28, 2004

Jewish Home Auditorium
4101 East Genesee Street
Syracuse, New York

BOND, SCHOENECK & KING, PLLC
ATTORNEYS AT LAW ■ NEW YORK FLORIDA KANSAS



Agenda

7:30 - 8:00

Registration and Continental Breakfast

8:00 - 10:00

Program (2.0 CLE Credits* in Professionalism and Ethics for attorneys)

SUPPLEMENTAL NEEDS TRUSTS

- General Overview
- "SELF-SETTLED" SNTs - USING INDIVIDUAL'S OWN MONEY
 - Payback requirement
 - Individual SNTs
- THIRD-PARTY TRUSTS
- SNT as a resource
- SNT distributions as income generally
- SNT distributions as income for recipients of Medicaid only
- SNT distributions as income for SSI recipients
- OTHER CONSIDERATIONS
 - Eliminate Spend-Down In Community Budgeting
 - Setting Up The Trust
 - Provisions Allowing Trustee to Terminate Trust

ETHICS IN PLANNING FOR THE ELDERLY

- Who is your client? Who do you represent?
 - Duty of Confidentiality
 - Waiver of Privilege
- Dual Representation – Conflict of interest?
- Testamentary Capacity
- Undue Influence
- Fees
- Supervision of non-attorney
- Unauthorized Practice of Law
 - Out of State Advice
 - Paralegal

***CLE Credit**

Bond, Schoeneck & King, PLLC has been certified by the New York State Continuing Legal Education Board as an Accredited Provider of Continuing Legal Education in the State of New York. Each program has been designated as providing the listed number of credits in accordance with the requirements of the New York State Continuing Legal Education Board.

Speakers

Joseph A. Greenman is a graduate of Colby College (B.A., 1971) and Syracuse University College of Law (J.D., *cum laude*, 1974).

Mr. Greenman counsels individual clients and business owners in estate and financial planning, estate administration, asset preservation and Elder Law matters. He has lectured extensively on probate and administration of estates, elder law and estate planning.

Mr. Greenman is a member of the New York State Bar Association (Elder Law Section, Committee on Estates, Trusts and Medicaid and Trust and Estate Section).



William J. Rubenstein is a graduate of Cornell University (B.S., 1996) and Syracuse University College of Law (J.D., *magna cum laude*, 2001). Mr. Rubenstein was an Associate Editor (1999-2001) and the Assistant Business Editor (1999-2000) of the [Syracuse Law Review](#), as well as a member of the Justinian Honorary Law Society (1999-2001). He was the Research Assistant to Professor Steven Wechsler, Syracuse University College of Law (2000-2001), for Contracts and Professional Responsibility.

Mr. Rubenstein's primary areas of practice include federal and state taxation matters for corporations, partnerships, limited liability companies, exempt organizations, individuals, trusts, and estates; development and implementation of sophisticated estate planning techniques for wealth preservation and transfer, succession planning, and asset protection; estate and trust administration; and Elder Law matters.

Mr. Rubenstein is a member of the American, New York State (Tax and Trusts & Estate Law Sections), and Onondaga County Bar Associations.



Directions to the Jewish Home Auditorium

Directions from North: Rte. 481 S to exit 3W (DeWitt). Merge onto E. Genesee St. center lane, 1/2 mile on right.

Directions from 81 S: Follow signs to Rte. 481 N to exit 3W (DeWitt). Merge onto E. Genesee St. center lane, 1/2 mile on right.

Directions from Downtown Syracuse: Take Genesee St. E 5 miles. Menorah Park on left.

Directions from East or West: NYS Thruway to exit 34A, follow directions as for North, above.

Professional Advisors Seminar

September 28, 2004

Registration Fee: \$10.00

Please RSVP 10 days prior to program.

Name: _____ Title: _____

Organization _____

Address: _____

City: _____ State: _____ Zip: _____

E-Mail: _____ Telephone: _____ Fax: _____

The following people will also attend:

Name: _____ Title: _____ E-Mail: _____

Name: _____ Title: _____ E-Mail: _____

The registration fee will be waived for demonstrated cases of financial hardship.

Refunds will only be made for cancellations received 5 business days before event.

Please make checks payable to Bond, Schoeneck & King, PLLC and return this form to:

Ms. Toko Moyo, Bond, Schoeneck & King, PLLC, One Lincoln Center, Syracuse, NY 13202

Ph: 1-800-339-8897 Fax: 315-218-8100 E-mail: tmoyo@bsk.com Or register on-line at www.bsk.com

This program is intended for the invited guests of Bond, Schoeneck & King, PLLC who reserves the right to deny admission to any applicant.
