

**The Connecticut Chapter of the National Academy
of Elder Law Attorneys (NAELA) presents:**

**ESSENTIAL AND PRACTICAL
ELDER LAW UPDATES
Friday, October 14, 2011**

**at Four Points by Sheraton, 275 Research Pkwy.,
Meriden**



Join other elder law attorneys for the day to catch up on Medicaid planning opportunities using trusts and annuities, home care options, and practice management solutions. Speakers will include DSS Hartford Supervisor John Levesque, Attorney Mark Dost, Attorney Joseph Cipparone, Attorney Donna Levine, and Paralegal Elizabeth Walsh.

**CT NAELA has been approved as an accredited sponsor of CLE activities
by the Connecticut Bar Institute, Inc.**

About the Speakers:

John Levesque is an Eligibility Services Supervisor for the State of Connecticut Department of Social Services. John has been a Supervisor with the Department since April of 2010. He has worked in Long Term Care/Home Care Intake and Case Maintenance since 1998. Prior to becoming Supervisor, John was a Specialist assigned to the Hebrew Home and Hospital. He has extensive experience with long term care coverage and the challenges that are presented in trying to determine eligibility for state assistance. John has been an active member of the department, working on a statewide team to modernize the service delivery of long term care eligibility, and modernizing computer systems to assist in making processes more steam lined (Ascend level of care approval, Ascend admission and discharge online system, Ascend payment system coordination) and is a member of the Long Term Care planning team. John holds a Bachelor of Science degree from Johnson and Wales University, Providence, Rhode Island.

Attorney Mark Dost practices with the law firm, Tinley, Nastro, Renehan & Dost, LLP, and is a member of the Connecticut (Member, Executive Committee, Estates and Probate Section, 1991-; Member, Executive Committee, 1991- and Chairman (1994-1996), Elder Law Section; Chairman, Publications Committee, 1997-2000) and American Bar Associations, and Fellow of the American College of Trust and Estate Counsel. He is the Co-Author of "Estate Planning with Retirement Benefit Distributions," with J. Gaiette, Aspen Law & Business (3d ed.) 2006, and author of "Charitable Deduction Planning for Avoiding the Connecticut Cliff Tax," CBA, December 2008, "Annuities and Medicaid Planning and Qualification after the Deficit Reduction Act," NAELA CT Chapter, October 2007; CBA, June 2008, "Testamentary Trusts, Taxes, and Title 19: The Use of Marital and Non-marital Trusts in Planning for Long-Term-Care Costs," CBA, November 2004, "Gift Planning by Connecticut Conservators," CBA Estates and Probate Newsletter, August 2002, "Basic Tax Planning Considerations in Elder Law," Fourth Annual New England Elder Law Symposium, Sept. 2001, and "Minimum Distribution Rules for Dummies?" (The New Minimum Distribution Regulations); The ElderLaw Report, Panel Publishers, April 2001. He has been recognized as 2011 Best Lawyers in America (trusts and estates; elder law), 2011 Super Lawyers (top 50 Connecticut lawyers), and Who's Who in America.

Attorney Joseph A. Cipparone is an attorney and Certified Financial Planner® practicing in New London, Connecticut. Joe has over 25 years of experience working with owners of closely held businesses, individuals and families on the full range of elder law, estate planning and business matters. These matters encompass the taxation of estates and gifts, Medicaid planning, and the preparation of wills, trusts, powers of attorney, prenuptial agreements, buy-sell agreements, and limited liability company documents. He also serves as trustee for numerous trusts. Joe is the 2010 – 2011 President of the Connecticut Chapter of the National Academy of Elder Law Attorneys (CT-NAELA). He serves on the Executive Committees of the Estates & Probate Section and the Elder Law Section of Connecticut Bar Association (CBA). He has served as chair of the continuing legal education committee of CT-NAELA and the CBA Elder Law Section. Joe has served as a seminar leader for CT-NAELA and the Elder Law Section. Joe recently authored the text, *Annuities in Connecticut Estate Planning, 2011*, published by Connecticut Bar Association's (CBA) LawFirst Publishing division, and has written numerous articles for such publications as the Estates & Probate Newsletter of the Estates & Probate Section, the Connecticut Law Tribune, Practical Tax Strategies, the Connecticut Lawyer and the Connecticut Bar Journal of the Connecticut Bar Association. Joe serves on the Board of Directors of the Estate & Tax Planning Council of Eastern Connecticut.

Attorney Donna Levine practices in the fields of estate planning and probate. Her practice emphasizes elder law issues and issues regarding persons with disabilities, including powers of attorney, living wills, wills and trusts, conservatorships, eligibility for Title 19, nursing home admission, and planning for children with disabilities. Attorney Levine was an estate administrator with the law firm of Bergman, Horowitz & Reynolds (now Withers Bergman) from 1976 to 1984. She has been in solo practice since 1990. Attorney Levine received her undergraduate degree from New York University in 1970, with honors in economics. She received a M.S. in Taxation degree from the University of New Haven in 1986 and received her J.D. from the University of Connecticut School of Law, cum laude, in 1989. Attorney Levine is a member of the American, Connecticut and New Haven County Bar Associations. She is a member of the Executive Committee of the Elder Law Section of the Connecticut Bar Association, and a member of the National Academy of Elder Law Attorneys and the Connecticut Chapter of NAELA. She has given numerous talks to community groups and other organizations. Attorney Levine lives and practices law in North Haven, Connecticut.

Elizabeth Walsh has been a paralegal with the law offices of Czepiga & Daly LLC since 2007. As a former employee of the Department of Social Services, Liz assists clients with navigating the Medicaid application process for the elderly and disabled in need of skilled nursing care and home care. Liz also brings to her clients her background in human services, with over 12 years experience in the mental health field. Liz's caring approach is especially valuable for those families who are facing the double burdens of an ill family member and the incessant demands of the State to document public benefits eligibility. Liz graduated from Central Connecticut State University in 1995 with a Bachelor's Degree in Psychology, and from American International College in 2003 with a Master's Degree in Forensic Psychology.

Registration Form

For CT NAELA's Essential And Practical Elder Law Updates

Friday, October 14, 2011 (8:30 am to 3:30 pm)

Continental breakfast and lunch included.

Name: _____

Firm Name: _____

Address: _____

Email Address: _____ Tele. _____

CT NAELA Member: Yes _____ Or No _____

CT NAELA MEMBER :

_____ attendance and materials (includes lunch) \$199
_____ cannot attend but want materials and CD \$199

NON-CT NAELA MEMBER:

_____ attendance and materials (includes lunch) \$249
_____ cannot attend but want materials and CD \$249

Register and pay by credit card by linking to: www.naela.org/CTFALL

Or Mail Check Payable To "CT NAELA" and registration to:

Attorney Elizabeth N. Byrne

141 Broad Street, Middletown, CT 06457

Tele. No.: (860) 344-1767 Fax: (860) 347-9038

ebyrne@fgb-law.com

Cancellation Policy: Cancellations and refund requests will be honored on the following basis: 7 days or more before the seminar, 100% refund; thereafter, registrant can substitute materials/CD order but no refund of seminar fee. Substitute registrants from same office are welcomed.