

NATIONAL ACADEMY of ELDER LAW ATTORNEYS MASSACHUSETTS CHAPTER MEETING NOTICE



BOSTON MARRIOTT NEWTON
2345 Commonwealth Ave.
Newton, MA 02466

Wednesday, January 29, 2020
5:30 PM – Reception - 6:00 PM - Dinner Meeting

Estate Recovery Row: The Basics and Current Trends

Current Medicaid regulations in Massachusetts require recovery from the probate estates of certain MassHealth members, as well as Pooled Trusts, Annuities, and (d)(4)(a) Trusts. In fact, Massachusetts has one of the most successful recovery programs in the United States. Our January 29, 2020 program will go over the basics of estate recovery, MassHealth estate recovery trends and how MassNAELA practitioners are pushing back. If you help clients plan for potential MassHealth issues or practice in the probate courts, you won't want to miss this program!

SPEAKERS



Attorney Catherine Aloisi (Moderator) began her career as a paralegal with Cushing & Dolan starting in the year 2000. She earned her Judicial Doctorate at night from Suffolk University Law School and was welcomed as an associate in 2004. She now manages the Elder Law Department run by Todd E. Lutsky, Esq., LL.M. Catherine is experienced in basic estate planning as well as the use of more sophisticated techniques such as annual exclusion gifts, Intentionally Defective Grantor Trusts, Irrevocable Life Insurance Trusts, GST Trusts and Dynasty Trusts. Catherine also supervises the team responsible for asset protection planning using various strategies including Medicaid Irrevocable Trusts, Annuities and Pooled Trusts. This team is involved with the preparation and prosecution of MassHealth/Medicaid nursing home applications and, to-date, has a high rate of success. Catherine also has experience in estate and trust administration as well as the preparation of estate and gift tax returns.



Attorney John Ford is Director of the Elder Law Project at the Northeast Justice Center in Lynn and has served as director since 1977. A well-known elder law practitioner, he has been a key figure in litigation and administrative advocacy regarding many issues impacting elders. He is the recipient of many awards and recognitions, including national elder advocacy awards, the Paul Lichterman Award presented by the National Conference on Law and Aging and the Powley Award and the Theresa Award presented by National Academy of Elder Law Attorneys (NAELA), the Advocacy Award of the Massachusetts Alzheimer's Association and the Massachusetts Bar Association's Public Interest Advocacy Award. In 2010 he was inducted into the National Association of Legal Services Developers' Elder

Rights Advocacy Hall of Fame.

John is past President of the Massachusetts Chapter of NAELA and the Massachusetts Guardianship Association, and is a member of the Massachusetts Guardianship Policy Institute. He was principal author and editor of a "Guide for Elders", the premier self-help resource available to Massachusetts senior citizens (on U. Mass. Gerontology Institute web site) and "A Handbook for Guardians of Nursing Home Residents in Massachusetts" (2005).

He is currently a member of the Massachusetts Guardianship Policy Institute and a board member of Massachusetts Advocates for Nursing Home Reform. John has taught at the Gerontology Institute at the University of Massachusetts, Boston, and is a frequent contributor to publications and programs on elder law issues. He received his legal education at Boston University School of Law.



Attorney Lisa Neeley is a partner of Mirick, O’Connell, DeMallie and Lougee, LLP, in Worcester, Massachusetts, where she is a member of the Trusts and Estates practice group. Lisa concentrates her practice in assisting clients obtain Medicaid eligibility for both long-term and community-based care, including the planning and preparation of Medicaid applications and appeals, special needs and disability planning, and general estate planning. She is a Fellow with the American College of Trust and Estate Counsel (ACTEC) and a member of the Massachusetts Chapter of NAELA. Lisa earned her BA degree, cum laude, from Assumption College and her law degree, cum laude, from New England School of Law.



Attorney Vicky Pulos joined MLRI in 2000 as a health law attorney. Her work concentrates on assuring low-income people access to health care, through advocacy, training, technical support, and litigation. Prior to joining MLRI she did children’s health work at Families USA in Washington D.C. and prior to that worked as a managing attorney at New Hampshire Legal Assistance. She received her law degree from Harvard Law School. She is the author of MLRI's MassHealth Advocacy Guide. Her current work focuses on defending coverage in the MassHealth and ConnectorCare programs. She has also worked extensively on immigrants' eligibility for health care programs.



Attorney Emily Starr concentrates primarily in assisting families whose members include elders, individuals with disabilities and special needs. Her areas of practice include benefits planning (Medicaid, SSI, Section 8 and VA benefits), estate planning and administration including special needs trusts, guardianship/conservatorship and probate.

Ms. Starr is a graduate of Vassar College and Boston University School of Law. She is a member of the Special Needs Alliance and the National Academy of Elder Law Attorneys (NAELA), has previously served on the Board of NAELA which awarded her the honor of Fellow. She is certified as an Elder Law Attorney (CELA) by the National Elder Law Foundation. She has chaired both the Boards of Elder Home Care Services of Worcester Area, Inc. and the Massachusetts Chapter of NAELA. She currently chairs the Ethics Committee of Briarwood Continuing Care Retirement Community, and serves on the Board of the Boylston Public Library Foundation and Briarwood as well as the Advisory Board of Trustees of the Seven Hills Foundation.

Ms. Starr was presented with the annual Award for Community Service by the Theresa Foundation in May of 2007 and, in January of 2009, with the Scholar Mentor Award by Massachusetts Continuing Legal Education (MCLE), which is presented to outstanding members of the bench and bar who have demonstrated leadership through long-term service to MCLE, excellence in teaching or writing, and creativity in the suggestion of program and publication ideas. She has been selected by her peers for inclusion in The Best Lawyers in America since 2007 in the area of elder law. Since 2005 she has been named a “Super Lawyer” in various categories including elder law, top 100 lawyers in Massachusetts and top 50 women lawyers in New

England. She has also been included in the list of Boston’s Best Lawyers published by the Boston Globe since July of 2007.

She has written extensively and from the date of its original publication until 2017 served as co-editor of a three volume treatise entitled Estate Planning for the Aged and Incapacitated Client in Massachusetts for Massachusetts Continuing Legal Education (MCLE). For twenty-five years she co-chaired the leading program on elder and disability law sponsored by MCLE and continues to speak frequently at continuing legal education programs and to other professional and non-professional groups

NOTICE TO BOARD OF DIRECTORS AND COMMITTEES

The following meetings will be held at the **Boston Marriott Newton Hotel** prior to the Dinner Meeting. Please check the hotel schedule of events for meeting locations.

MassNAELA Board of Directors	1:00 – 2:30 pm
MassNAELA Advocacy Work Group Meetings	3:00 – 4:00 pm
MassNAELA Advocacy Updates	4:00 – 5:30 pm

For More Information: Call Clarence Richardson at (617) 566-5640

- **REGISTER and PAY ONLINE AT www.MassNAELA.com OR**
- **REGISTER ONLINE and then SEND PAYMENT by US MAIL to: MassNAELA, P.O. Box 600046, Newtonville, MA 02460, or Pay at the door**

FEES

MassNAELA Member Attorney Guest	MassNAELA Member Non-Attorney Employee	Law Student
<p>\$70.00 per person (includes parking voucher)</p> <p>Registration at the Door: \$75.00 per person (does not include parking voucher)</p>	<p>\$90.00 per person (includes parking voucher)</p> <p>Registration at the Door: \$100.00 per person (does not include parking voucher)</p>	<p>No Charge (Parking voucher not included)</p>

REGISTRATION

MassNAELA Members may be accompanied by non-attorney employees, attorney guests, and law students. Attorney guests may attend up to two meetings before deciding to become a member. If you are not a member of National NAELA and the Massachusetts Chapter, and are a licensed attorney or law student, consider joining now. For membership information, visit our website www.MassNAELA.com and click on “Become a Member.”

Step One: Online Registration

Please register online at www.massnaela.com or at the link provided in the e-mail. You must register online, whether or not you pay online. **To receive your program materials electronically prior to the meeting, please register two days before the meeting. Materials will not be available at the meeting.**

Step Two: Payment

Option 1: Online Payment: Submit credit card payment information when prompted and complete the registration process.

Option 2: Off-line Payment by credit card or by check: After completing Online Registration, please complete and return the following form with your preferred method of payment. (This form should not be used in lieu of registering online.)

Off-line Payment by Credit Card or by Check:

Name _____ Firm _____

EMAIL Address: _____ Tel: _____

Meeting Date: _____ Program Title: _____

Check One:

- Check payable to MassNAELA enclosed

Name on Check _____

Check No. _____

Amount _____

- Credit Card (Please bring the credit card you wish to pay with to the dinner meeting and it will be processed at the registration table.)

After registering online, please submit completed form by:

- US Mail Only to: MassNAELA; P.O. Box 600046; Newtonville, MA 02460

For more information: Call Clarence Richardson at (617) 566-5640