

NATIONAL ACADEMY of ELDER LAW ATTORNEYS MASSACHUSETTS CHAPTER MEETING NOTICE



Thursday, December 8, 2022

4:30 PM – Vendor Fair (Bring your business cards!)

6:00 PM - Dinner Meeting

*******RETURN TO OUR USUAL VENUE!*******

Boston Marriott Newton

2345 Commonwealth Avenue, Newton, Massachusetts 02466

(Parking available on site)

All About Estates

Join us for our **IN-PERSON ONLY** annual dinner meeting and catch up with colleagues that you haven't seen in a while! For the first time since January 2020 we will be back at the Newton Marriott that we all know and love.

We will have three great presenter that will address the following topics:

- Naming the **Estate** as designated beneficiary of retirement accounts coupled with testamentary trusts may be the panacea for Medicaid, income and **Estate** tax planning;
- MassHealth's latest efforts to expand **Estate** Recovery by refusing to release lifetime liens, and what to do when you experience this problem; and
- Some of the most common issues that court clerk encounter during the **Estate** Administration process.

Prior to our educational program, we will hold our Vendor Fair (in-person) for the first time since 2019! Don't forget your business cards since many of the vendors will have raffle prizes. In addition, any members that visit all of the vendors will be entered in a raffle to win a \$500 gift card.

Finally, we will present our annual awards to well-deserving community partners and MassNAELA Members. We look forward to seeing you in-person on December 8!

SPEAKERS



Attorney Brian E. Barreira provides legal services to individuals, married couples, senior citizens, business owners, disabled persons and their families in the areas of estate planning (including wills, trusts, durable powers of attorney, health care proxies, buy-sell agreements and prenuptial/postnuptial agreements), long-term care planning (including MassHealth), governmental benefits planning (including SSI), estate and gift tax matters and Probate Court issues (including estates, trusts, will contests, conservatorships and guardianships).

An early leader in the development of elder law as a legal specialty, Brian served during 1990-1996 as the first Chair of the Elder Law Committee of the American Bar Association's General Practice Section. He has also served as President of the Massachusetts Chapter of the National Academy of Elder Attorneys, and as Chair of the Committee on Long-Term Health Care Issues of the American Bar Association's Real Property, Probate & Trust Law Section. After certification of elder law attorneys became available through the National Elder Law Foundation, Brian served on its Examination and Grading Committees. Among Brian's diverse experiences, he has served as a background source on elder financial abuse reports for the Boston Globe Spotlight Team and 60 Minutes; as an undercover informant for the Massachusetts Attorney General's Office in shutting down an organization that was fraudulently selling trusts to senior citizens; and as an expert witness in a recent case opposing the fees of two lawyers who attempted to charge over \$500,000 for an 83-day temporary guardianship. Brian is listed in the Martindale-Hubbell Bar Registry of Preeminent Lawyers in the fields of "Elder Law" and "Trusts & Estates, Wills & Probate." He has been selected as a Massachusetts Super Lawyer in 2009-2015.

Attorney Sarah Long is the First Assistant Register of Probate for the Barnstable Probate and Family Court where she works with the Register of Probate in the administration and management of the court, including providing legal, procedural, and administrative information to staff, litigants, and members of the bar. As an MUPC Magistrate, she is actively involved in reviewing Formal and Informal probate petitions, Petitions for Complete Settlement, Trust and Probate accounts, General Trust and Probate Petitions, Partitions to Petition, and Complaints in Equities. As Attorney Long is one of the Magistrates in the Barnstable Probate Court, if you received a decree from that court in the past year, there's a good chance Attorney Long's signature is on the decree and the bond.

Prior to joining the Probate and Family Court, Attorney Long was in private practice providing estate planning services and representing clients in family law and probate matters in five counties. Until taking her current position, she was a member of MassNAELA and represented clients in elder law issues and MassHealth challenges. She accepted many guardianship and conservator appointments, and served as GAL in probate matters. Attorney Long is an advocate for access to justice, and was an early member of Justice Bridge Legal Services in New Bedford and Boston, and currently sits on their board. Attorney Long received her Juris Doctor from the University of Massachusetts School of Law, and a Bachelor of Electrical Engineering from McGill University.



Attorney Todd E. Lutsky joined Cushing & Dolan, P.C. in 1995. A former tax attorney for Price Waterhouse LLP, Mr. Lutsky is now a member of the National Aging In Place Council, the Boston Estate Planning Council, and the National Academy of Elder Law Attorneys. He has been selected to Super Lawyers several years including 2022. Admitted to practice in Massachusetts, Connecticut, and Pennsylvania, he has almost three decades of experience, is a current lecturer for Boston University School of Law's Graduate Tax Program and has published in the Estate Planning Journal.

Mr. Lutsky began co-hosting a radio talk show called “Money Matters” in 1998 and answered questions on estate and gift tax planning, elder law, and asset protection planning matters. He then moved on to host his own radio show “The Legal Exchange with Todd Lutsky” where he uses real cases from around the country and real life stories to educate the public one story at a time on important legal matters. His show focuses on estate, gift, and income tax planning matters, elder law planning including, Medicaid eligibility and asset protection planning matters.

He most recently began appearing on the Financial Exchange Radio Show in a segment called “Ask Todd” where he takes callers questions on anything estate, gift, or elder law planning related.

Mr. Lutsky is regularly asked to speak for the National Business Institute, the Massachusetts Association of Accountants, the Massachusetts Chapter of the National Academy of Elder Law Attorneys, the Massachusetts Continuing Legal Education, the Foundation for Continuing Education, and the Boston Tax Institute. He also writes extensively on estate and elder law planning topics and prepares written materials for all speaking engagements.

NOTICE TO BOARD OF DIRECTORS AND COMMITTEES

The following meetings will be held at the **Hilton Boston/Woburn** 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 Meeting	3:00 – 4:30 pm
MassNAELA Vendor Fair	4:30 – 6:00 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**

FEES

MassNAELA Member or Attorney Guest	Law Student
\$50.00 per person	No Charge

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. 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