

2018 When Personal Injury Settlements Meet Special Needs Planning

November 13, 2018 • STUDIO WEBCAST

Tuesday Morning, Nov. 13, 2018

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| 10:00 am 1.00 hr 0.75 hr ethics | <p>Introduction, Overview and Understanding the Fundamentals of the Special Needs Trusts and the SNT Attorney's Role</p> <p>This segment highlights the due diligence each party should consider to understand and explain potential government benefit eligibility to the client who has received a personal injury recovery. Explore the fundamentals of special needs trusts and the use of A.B.L.E. accounts in light of current and potential SSI and Medicaid eligibility. And, from the perspective of the special needs planner, walk through what to expect and what questions are typically asked in the initial consultation with the personal injury attorney.</p> <p>Elisa Dillard Rainey, Rainey & Rainey, Attorneys at Law LP - Waco, TX</p> |
| 11:00 am | <p>Break</p> <p>15 minute break</p> |
| 11:15 am 0.75 hr 0.50 hr ethics | <p>Consultation with Personal Injury Attorney and Guardian Ad Litem</p> <p>In the initial consultation with the personal injury attorney, special needs planner, and in some cases, a guardian ad litem, walk through some key expectations for your case, guidance in identifying public benefits and programs, issues and options when creating special needs trusts, and other questions that should be addressed early in the case.</p> <p>Moderator: Elisa Dillard Rainey, Rainey & Rainey, Attorneys at Law LP - Waco, TX Panelists: Glenn W. Cunningham, Law Offices of Glenn W. Cunningham - San Antonio, TX Luke Dow, Luke Dow Law Firm - Austin, TX</p> |
| 12:00 pm | <p>Break</p> <p>15 minute break</p> |
| 12:15 pm 0.75 hr 0.50 hr ethics | <p>Consultation with the Personal Injury Attorney, Guardian Ad Litem and Trustee</p> <p>Identifying a trustee is an important step toward the drafting and administration of a special needs trust. Understand the trustee's role in trust administration, including what to expect and look for in a trustee, examples of distributions, considerations in making distributions, and possible conflicts.</p> <p>Moderator: Elisa Dillard Rainey, Rainey & Rainey, Attorneys at Law LP - Waco, TX Panelists: Glenn W. Cunningham, Law Offices of Glenn W. Cunningham - San Antonio, TX Luke Dow, Luke Dow Law Firm - Austin, TX Nancy Sosa, Cadence Bank - Austin, TX</p> |
| 1:00 pm | <p>Break</p> <p>30 minute break</p> |

Tuesday Afternoon, Nov. 13, 2018

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| 1:30 pm 0.75 hr 0.50 hr ethics | <p>Consultation with the Personal Injury Attorney, Guardian Ad Litem, and Settlement Annuity Broker</p> <p>Using a structured settlement in conjunction with a special needs trust introduces additional considerations. Learn what a structured settlement annuity is, and potential the pros and cons of its use. Plus, explore key aspects of an annuity, including structure and trust funding, naming beneficiaries, potential estate tax issues, and more.</p> <p>Moderator: Elisa Dillard Rainey, Rainey & Rainey, Attorneys at Law LP - Waco, TX</p> <p>Panelists: Glenn W. Cunningham, Law Offices of Glenn W. Cunningham - San Antonio, TX Carola Davis, Davis Settlement Partners - New Braunfels, TX Luke Dow, Luke Dow Law Firm - Austin, TX</p> |
| 2:15 pm | <p>Break</p> <p>15-minute break</p> |
| 2:30 pm 0.50 hr | <p>Drafting the Special Needs Trust</p> <p>Walk through the drafting phase for the special needs trust, including drafting the custom-designed SNT, assisting in creating a pooled SNT, drafting pleadings to establish a court-created SNT, as well as collaborating with the personal injury attorney, guardian ad litem, and trustee for their review.</p> <p>Elisa Dillard Rainey, Rainey & Rainey, Attorneys at Law LP - Waco, TX Nancy Sosa, Cadence Bank - Austin, TX</p> |
| 3:00 pm | <p>Break</p> <p>15 minutes break</p> |
| 3:15 pm 0.75 hr ethics | <p>Conclusion and Finalizing Representation</p> <p>Once the special needs trust has been drafted, it is time to finalize representation and review all documents with each party and with the client. Walk through the final considerations, expectations and necessary steps to close the case file. Plus, hear final thoughts and key take-aways from the perspectives of the personal injury attorney, special needs planner, guardian ad litem, trustee and settlement annuity broker.</p> <p>Moderator: Elisa Dillard Rainey, Rainey & Rainey, Attorneys at Law LP - Waco, TX</p> <p>Panelists: Glenn W. Cunningham, Law Offices of Glenn W. Cunningham - San Antonio, TX Carola Davis, Davis Settlement Partners - New Braunfels, TX Luke Dow, Luke Dow Law Firm - Austin, TX Nancy Sosa, Cadence Bank - Austin, TX</p> |
| 4:00 pm | <p>Presentation Concludes</p> |