



**2022 UnProgram
September 22-24
Richmond Hilton Downtown
Richmond, VA**

Thursday, September 22 (Optional)

2:00 pm – 4:30 pm Advanced Elder Law Practitioners Round Table (for VAELA members with 6+ years of Elder Law experience) **Miller**

6:00 pm – 7:00 pm Wine & Cheese Welcome Reception Sponsored by Cumberland Trust (For VAELA members and spouses only) **Salon C**

Friday, September 23

8:00 am – 8:45 am Registration; Continental Breakfast & Visit Sponsors & Exhibitors **River City Ballroom**

8:45 am – 9:00 am Welcome – Scott Alperin, VAELA President, & Guest Speaker Introduction by Aaron Kempen, Krause Financial Services **MRG Ballroom**

9:00 am – 10:15 am Planning for Retirement Benefits Post-SECURE under Treasury's Proposed Regulations – Natalie B. Choate, Esq. **MRG Ballroom**

10:15 am – 10:30 am Break; Visit Sponsors & Exhibitors **River City Foyer & MRG Ballroom Foyer**

10:30 am – 12:00 pm Planning for Retirement Benefits Post-SECURE under Treasury's Proposed Regulations – Natalie B. Choate, Esq. **MRG Ballroom**

12:00 pm – 12:15 pm Estate Planning for Retirement Benefits Follow Up **MRG Ballroom**

12:15 pm – 1:15 pm Lunch Sponsored by Members Trust Company & West Financial Services **River City Ballroom**

1:15 pm – 2:00 pm VAELA Business Meeting **MRG Ballroom**

2:00 pm – 2:15 pm Presentation by Laurie MacNaughton, Atlantic Coast Mortgage **MRG Ballroom**

2:15 pm – 2:30 pm Brief 2022 Legislative Update **MRG Ballroom**

2:30 pm – 2:45 pm Break; Visit Sponsors & Exhibitors **River City Foyer & MRG Ballroom Foyer**

2:45 pm – 3:15 pm Members Forum - UnProgram Discussion on Current Elder Law Issues **MRG Ballroom**

3:15 pm – 4:15 pm Small Group Break Out Sessions (by geographic area)

- Hampton Roads **Miller**
- Northern Virginia **Gerhart**
- Richmond/Central Virginia **Rhoads**
- Western Virginia **Ensemble**

5:00 pm – 6:00 pm Cocktail Reception Sponsored by Atlantic Coast Mortgage **Amethyst Foyer**

6:00 – 7:00 pm Elder Law Trivia Game **Amethyst**

Saturday, September 24

7:30 am – 8:00 am Registration for Saturday Only Attendees MRG Ballroom Foyer

7:45 am – 8:50 am Breakfast Buffet River City Ballroom

9:00 am – 10:00 am Break Out Session I

Building Court Record for Appeal – Ross Hart, Esq. Rhoads

Who Are You & What Are You Doing in My Office? -- Ethical Issues Relating to the Attorney-Client Relationship

In the Elder Law Context – Neal Walters, Esq. Miller

Introduction to Special Needs Trusts in Virginia: A Primer – Loretta Vitt Dubova, Esq. & Jim Vitt, Esq. Gerhart

Benefits for Veterans & Surviving Spouses – An Essential Tool for an Elder Law Attorney – Bart Barton, Esq.

Ensemble

Tax Planning Strategies: Using Trusts to Save Taxes – Helena Mock, Esq. Amethyst

10:00 am – 10:15 am Break; Visit Sponsors & Exhibitors River City Foyer & MRG Ballroom Foyer

10:15 am – 11:15 am Break Out Session II

Planning With LLC's – Scott Alperin, Esq. Amethyst

§ 64.2 Litigation: Guardianship/Conservatorship Petitions & Will Contests – Beth Norton, Esq., Shawn Majette, Esq., John O'Herron, Esq. & Todd Weatherly, M.Ed., QMHP, QSAP Gerhart

Achieving A Better Life Experience Act Of 2014: 2020 Regulations & ABLE Account Distributions – Ann Green, Esq. & Alisa Ferguson, Esq. Ensemble

Protecting Your Clients, Yourself, & Your Estate in the Event of Your Death or Disability - Seth Guggenheim, Esq. & Paul Georgiadis, Esq. Miller

Estate Planning for Cryptocurrency – Jennifer Lucey, Esq. Rhoads

11:20 am – 12:20 pm Break Out Session III

Who Are You & What Are You Doing in My Office? -- Ethical Issues Relating to the Attorney-Client Relationship In the Elder Law Context - Neal Walters, Esq. Miller

Mastering Medicaid & Veterans Asset Protection Planning - Evan Farr, CELA, CAP Rhoads

Introduction to Special Needs Trusts in Virginia: A Primer - Loretta Vitt Dubova, Esq. & Jim Vitt, Esq. Gerhart

Contested Guardianships & Conservatorships: Let's Get Ready to Rumble! – Jean Galloway Ball, CELA, CAP, Cary Cucinelli, Esq., Valerie Geiger, Esq. & Kimberley Murphy, Esq. Amethyst

A Roadmap to CBC Medicaid Qualification – Jeremy Pryor, Esq. Ensemble

12:30 pm – 1:45 pm Lunch Sponsored by Arden Courts/ProMedica & Minnesota Lawyers Mutual River City Ballroom

1:45 pm – 2:45 pm Break Out Session IV

Benefits for Veterans & Surviving Spouses – An Essential Tool for an Elder Law Attorney – Bart Barton, Esq. Amethyst

§ 64.2 Litigation: Guardianship/Conservatorship Petitions & Will Contests – Beth Norton, Esq., Shawn Majette, Esq. John O'Herron, Esq., & Todd Weatherly, M.Ed., QMHP, QSAP Gerhart

Protecting Your Clients, Yourself, & Your Estate in the Event of Your Death or Disability - Seth Guggenheim, Esq. & Paul Georgiadis, Esq. Miller

Tax Planning Strategies: Using Trusts to Save Taxes – Helena Mock, Esq. Rhoads

A Roadmap to CBC Medicaid Qualification – Jeremy Pryor, Esq. Ensemble

2:45 pm – Break; Visit Sponsors & Exhibitors River City Foyer & MRG Ballroom Foyer

2:50 pm – 3:50 pm Break Out Session V

Building Court Record for Appeal – Ross Hart, Esq. Rhoads

2022 Lessons from the Field: Preventing the Top 10 Malpractice & Ethics Mistakes - Joyvan Griffin, Esq. Miller

Achieving A Better Life Experience Act Of 2014: 2020 Regulations & ABLE Account Distributions - Ann Green, Esq. & Alisa Ferguson, Esq. Ensemble

Contested Guardianships and Conservatorships: Let's Get Ready to Rumble! – Jean Galloway Ball, CELA, CAP, Cary Cucinelli, Esq., Valerie Geiger, Esq. & Kimberley Murphy, Esq. Amethyst

Introduction to Crisis Medicaid Matters & Basic Resource Protection in Long Term Care Crises - Ari N. Sommer, Esq. Gerhart

4:00 pm – 5:00 pm Break Out Session VI

Introduction to Crisis Medicaid Matters & Basic Resource Protection in Long Term Care Crises –

Ari N. Sommer, Esq. **Gerhart**

Planning With LLC's – Scott Alperin, Esq. **Ensemble**

2022 Lessons from the Field: Preventing the Top 10 Malpractice & Ethics Mistakes – Joyvan Griffin, Esq. **Miller**

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Estate Planning for Cryptocurrency – Jennifer Lucey, Esq. **Rhoads**