

Wednesday,
November 12, 2008
1:00 pm - 4:30 pm

Classic Residence by
Hyatt in Boca Raton
22601 Camino Del Mar
561-416-2724

Elder Law Forum

A Forum for Diverse Professionals with a Common Interest:

Facing the Challenges of Home, Hospital and Facility-Based Care



Join us for the 1st Annual Elder Law Forum, featuring a unique array of presenters from health care, insurance, government, law and consumer advocates, who will address critical questions facing seniors and people with disabilities living in Florida. We will focus on home and community-based care initiatives to provide a vision of the future that includes rapid changes in health care and responses to budget cuts.

Long term care and Medicaid continue to be among the most difficult issues faced by the State of Florida and the nation. Recent studies confirm that the present health care system is ill-equipped to handle the rising tide of seniors and the elderly, with a flood about to break through the levies as baby boomers become Medicare recipients in 2010.

The issues at hand include:

- How will the need for increasing amounts of health care and long term care impact the State's ability to balance the budget?
- How can individuals plan to protect their futures?
- How will the Governor's office, along with the Legislature, balance Medicaid Programs with Full Benefits, Medicaid Programs with Limited Benefits, Non-Medicaid Programs and the Long Term Care Insurance Partnership Program to best serve the needs of our aging population?

Meanwhile, the impact of changes to Medicaid and long term care insurance enacted through the Deficit Reduction Act of 2005 are being felt by providers and consumers alike. Hospitals, nursing homes, assisted living facilities, home care agencies — and the people who need them most — are being hit hard all across the country. In Florida, the implementation of the Deficit Reduction Act on November 1, 2007 has led to a complex maze for Medicaid applicants, spawning issues that will only be decided by lengthy and costly litigation.

Please join our uniquely qualified panel of experts on November 12, 2008 for a thoughtful, thorough and timely discussion on the challenges and opportunities facing seniors and persons with disabilities in Florida. We have structured this program in such a way that the speakers will only start the discussion; it is the attendees who will shape the debate on the difficult issues we face.

Howard S. Krooks, Esq., CELA

Ellen S. Morris, Esq.



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Conference updates are available at: www.ElderLawAssociates.com
For more information: 1-800-ELDERLAW (353-3752) or 561-750-3850

Agenda

1:00 – 1:15 Registration and Networking

1:15 – 1:30 Welcome & Introduction
Elder Law Update

Howard S. Krooks, Ellen S. Morris

1:30 – 2:15 Breakout Session A

2:15 – 3:00 Breakout Session B

Topics

1. Public Policy & Legislative Advocacy

Laura Goodhue, Darrick D. McGhee

2. The Continuum of Care

Elayne Forgie, Julie Gelbwaks Gewirtz, Veronica Logan

3. Increasing Options for Consumers

Marc Dubin, Jaclynn I. Faffer, Yolanda Rodriguez

The three topics listed above will be presented at the first breakout session and then repeated. You will select one topic to attend for Breakout Session A and one topic to attend for Breakout Session B.

Our goal is to enable the attendees to engage in small group discussions, have individual questions answered and have greater input in the dialogue. We hope to foster communication, collegiality and discuss real answers for attendees through an interdisciplinary approach. The breakout sessions are structured to utilize the experience of our speakers, and to provide a full opportunity to engage in open dialogue.

3:00 – 3:15 Break

Light refreshments will be served

3:15 – 4:30 Plenary Session and Q & A

We will come together to hear one speaker from each breakout session summarize their group's discussion. Then our panel will engage the attendees in an open forum on the issues. Attendee participation and questions will be encouraged to provide a truly interactive dialogue with leaders in the long term care industry on policy, programs, and practical solutions to the current health care crisis.

The Talent...

Our speakers have been carefully selected to represent a critical element of the long term care spectrum. Each will present on the issues facing his or her industry or constituents, advocating for solutions from a unique perspective.

GOVERNMENT

Darrick D. McGhee became the Director of Legislative Affairs for the Department of Elder Affairs in 2007 after working as the Deputy Director of Legislative Affairs for four years. His responsibilities include operating as the chief liaison to the Florida Legislature, assisting the Legislature in its duties in both proactive and reactive roles, and proposing and drafting legislation that will assist Florida's elders.

Prior to these positions with the Department of Elder Affairs, Mr. McGhee served as the Special Assistant to the Chief of Staff and Director of the Governor's Internship Program in Governor Jeb Bush's office. He assisted with the day-to-day operations of the Chief of Staff's office and reported directly to the Chief of Staff on all staff matters. As Director of the Governor's Internship Program, he reported directly to the Governor on a bimonthly basis, represented the Executive Office of the Governor at college roundtables regarding the enhancement of educational opportunities and provided students with an opportunity to gain hands-on experience in the executive branch of Florida government.

SERVICE PROVIDERS

Jaclynn I. Faffer, PhD is the Executive Director of Ruth Rales Jewish Family Service (RRJFS) of South Palm Beach County. RRJFS is the largest non-profit, non-sectarian social service agency in the county, serving over 35,000 clients annually.

In 2005 Dr. Faffer was appointed to be a delegate at the White House Conference on Aging. She received 'The Distinguished Service Award' for her superior service to the Jewish Family & Children's Agency movement in North America from the Association of Jewish Family & Children's Agencies (AJFCA). She is VP of the Board of Directors of the AJFCA and received the award for 'Distinguished Leadership as Board Member' in 2002. She is the immediate past chair of the Jewish Social Service Professional Association for the National Jewish Family Service movement.

Dr. Faffer was Director of Human Services for UJA Federation in New York and Assistant Executive Director of Jewish Community Services of Long Island. She has been an Adjunct Professor at Wurzweiler School of Social Work and Barry University School of Social Work. She was Director of Social Work and Adult & Geriatric Psychiatry at a private psychiatric hospital in New York. Dr. Faffer has a MSW and a PhD in Social Welfare.

Elayne Forgie, PhD, CMC is a professional geriatric care manager and certified health and wellness coach specializing in Alzheimer's disease, dementia and other memory impairments. She has a PhD in Social Work, is certified by the National Academy of Certified Care Managers and was a founding Board Member of the Florida Geriatric Care Managers Association. She is the president and founder of the ElderCare Resource Center, ElderCare at Home, and The ElderCare Foundation, a not-for-profit corporation that provides 24 hours of emergency respite care in the patient's home.

Dr. Forgie is serving on the Advocacy Advisory Board for the Alzheimer's Foundation of America and has been awarded their Excellence in Care Specialist designation. She is a member of the Case Management Society of America and American Counseling Association. Dr. Forgie is active in a number of local organizations and is presently working with other local leaders in the establishment of Dementia Specific Standards for service delivery to patients and caregivers affected by Alzheimer's disease.

...Who Make This Program Special

Veronica Logan has been the Administrator of Springtree Rehabilitation and Health Care Center in Sunrise, Florida, since 1994. She has 25 years of experience in the long term care industry, serving in the positions of Director of Social Services, Director of Admissions, and Social Work Consultant for long term care facilities. She has a Bachelor of Social Work and became licensed as a Nursing Home Administrator in 1993.

CONSUMER ADVOCACY

Marc Dubin, Esq. is an attorney and serves as Director of Advocacy for the Center for Independent Living of South Florida (Miami-Dade). He also consults on the federal civil rights of people with disabilities. From 1992-2005, Mr. Dubin served as a Senior Trial Attorney at the Justice Department in the Disability Rights Section of the Civil Rights Division, in Washington, DC. He was responsible for nationwide enforcement of the Americans with Disabilities Act on behalf of the United States, as well as education about the law and development of technical assistance materials. He was a prosecutor for over 10 years, and served as Special Counsel to the Justice Department's Office on Violence Against Women, in Washington, DC. He is a former Special Assistant US Attorney, and serves as Executive Director of CAVNET, a nonprofit crime victims' organization that focuses on violence against women, crime victims with disabilities, and human rights. He serves as Chair of the Disability Law Committee of The Florida Bar, a Committee of the Public Interest Law Section.

Laura Goodhue is the Executive Director of Florida CHAIN, a statewide health care advocacy organization that leads the state in championing for access to affordable and quality health care for all Floridians. Before joining Florida CHAIN she served as the Policy Director of Florida ACORN, the state's largest membership organization of low and moderate income Floridians. Prior to coming to Florida, Ms. Goodhue worked for several organizations focused on meeting the health and human service needs of low-income persons including Legal Aid of North Carolina, Casa del Pueblo in Washington, DC and the Organization of American States. She holds a Masters degree in Latin American Studies from American University.

Yolanda Rodriguez is the Project Director of the Northwest Focal Point Senior Center and Adult Day Care located in Margate, Florida. She manages a \$1.2 million budget of local, state and federally funded community-based programs with the goal to preserve the independence of elders residing in northwest Broward County.

Currently, Ms. Rodriguez is a member of the Board of Trustees of the Florida Council on Aging and Immediate Past President of the Florida Association of Aging Services Providers. She has been appointed to both national and state advisory committees and work groups regarding senior services. In 2006, she was honored as the 'Project Director of the Year' in Broward County and she accepted the 'Gavel of Excellence' award from the National Institute of Senior Centers as President of the '2006 State Association of the Year.'

Ms. Rodriguez earned a Bachelor degree in Economics from the University of Florida and was honored for an outstanding residency program as well as named 'Outstanding Graduate Scholar in Health Service Administration' at Florida International University.

INSURANCE

Julie Gelbwaks Gewirtz is the VP of Marketing for Gelbwaks Insurance Services, Inc., runs the Independent Brokerage Division of its parent company, LTC Global, and handles personal sales. Ms. Gewirtz is Past President of the Broward Association of Health Underwriters, past board member of Women in Insurance and Financial Services, a past board member of the Dade Association of Health Underwriters, and a member of the American Association for Long Term Care Insurance. She is a Florida state certified instructor for Long Term Care continuing education and has organized multiple LTCi symposiums. She

regularly teaches advanced LTCi workshops to agents and has contributed to the development and product design of some of the newest, most innovative LTCi plans in the marketplace today.

Ms. Gewirtz has presented on the topic of long term care insurance to a wide range of related industries across the country. She also has a new industry designation, Certified in Long Term Care. In 2003, Ms. Gewirtz was awarded the Broward Association of Health Underwriters 'Stanley Greenspun Health Person of the Year Award.' Ms. Gewirtz is a graduate of the University of Florida with a Bachelor of Science in Advertising.

ELDER LAW

Howard S. Krooks, Esq., CELA is a partner of Elder Law Associates PA and is admitted to practice law in Florida and New York. Mr. Krooks' professional practice is devoted to elder law and trusts and estates, including representing seniors and persons with special needs and their families in connection with asset preservation planning, supplemental needs trusts, Medicaid, planning for disability, guardianship, wills and advance directives.

As a member of the Joint Public Policy Task Force of the Florida Bar Association Elder Law Section and the Academy of Florida Elder Law Attorneys, Mr. Krooks works to protect the rights of the state's most vulnerable citizens.

Mr. Krooks is certified as an Elder Law Attorney by the National Elder Law Foundation and is a member of the National Academy of Elder Law Attorneys (NAELA) Board of Directors. He serves on the Executive Council of the Elder Law Section of The Florida Bar as NAELA Liaison. He is a Past Chair of the Elder Law Section of the New York State Bar Association (NYSBA). He is a 2007 and 2008 Florida Super Lawyer and named to *Florida Trend's* Legal Elite in 2007.

Mr. Krooks received the '2006 Outstanding Achievement Award' from the New York Chapter of NAELA for serving as Co-chair of a Special Committee on Medicaid Legislation formed by the NYSBA Elder Law Section to oppose New York Governor George Pataki's budget bills. He was recognized for serving as Co-chair of the NYSBA Elder Law Section Compact Working Group for developing alternative methods of financing long term care. Mr. Krooks served as Chair of a Special Committee created by the NYSBA Elder Law Section to address the Statewide Commission on Fiduciary Appointments formed by Chief Justice Judith Kaye. He is a former Adjunct Assistant Professor at NYU's School of Continuing and Professional Studies and served as an instructor for the New York Certified Guardian & Court Evaluator Training program.

Ellen S. Morris, Esq. is a partner in the law firm of Elder Law Associates PA. She focuses on elder law, wills and trusts, Medicaid and nursing home planning, Medicaid applications, disability planning, special needs trusts, guardianship, asset preservation planning, estate and trust administration, and elder law litigation. Previously, Ms. Morris was an Assistant State Attorney for Dade County, Florida under the direction of State Attorney Janet Reno.

Ms. Morris is the Legislative Chair of the Elder Law Section of The Florida Bar and the Co-chair of the Elder Law Section of the South Palm Beach County Bar Association. In these roles, as well as being an active member of the Academy of Florida Elder Law Attorneys and the National Academy of Elder Law Attorneys, Ms. Morris participates in elder law-related legislative initiatives and devotes much of her time to analyzing the new rules and updated regulations affecting seniors and others with disabilities who require government services and protection. Ms. Morris is active in the Florida Association of Women Lawyers and is the State Public Affairs Chairperson for National Council of Jewish Women in the State of Florida. As Chairperson, Ms. Morris lobbies on national, state and local levels to ensure the protection of the rights of women, children, families and seniors.

Ms. Morris was named The Florida Bar Elder Law Section 'Member of the Year' in 2008. She was named to *Florida Trend* magazine's Florida Legal Elite in 2007. Ms. Morris is a graduate of the University of Florida with honors where she received her undergraduate and law degrees.