# Elder Law Section Spring CLE

**ORIGINAL PROGRAM DATE**
April 13, 2021

**AVAILABLE MEDIA TYPES**
Video & Audio MP3

*Presented in partnership with WSBA Elder Law Section*

## REPORTING YOUR CREDIT

This on-demand seminar was originally presented as a live webinar on April 13, 2021, in Seattle, WA. If you attended the live webinar and reported CLE credits, you cannot also report credits from watching or listening to this recording if repeated within your three year reporting period.

## DESCRIPTION

This program is designed to provide up-to-date guidance for experienced Elder Law attorneys, as well as attorneys who simply find their client base is aging. In anticipation of Washington passing the Electronic Wills Act, you will learn the advantages and pitfalls of digital wills from a nationally recognized speaker. You will also learn innovative uses for ABLE accounts, retirement planning in the wake of the SECURE Act, along with trust strategies and income tax considerations for long-term care financing and estate planning. This program also includes our annual legislative review and an update on the status of long-term care facilities in Washington, after a year of Covid-19.

## AGENDA

1 **Electronic Wills Act**
20 years ago the Uniform Electronic Transactions Act allowed parties to transact business electronically. States are adopting the Electronic Wills Act in order to bring estate planning into the era where so many transactions are done electronically. The night before this seminar the Washington Legislature passed the Electronic Wills Act and it was signed into law on April 26. This session provides a history of the act and a review of specific cases that sheds light on this new addition to Washington law.
*Robert Fleming – Fleming & Curti PLC, Tucson, AZ*

2 **SECURE Act**
Learn about the Setting Every Community Up for Retirement Enhancement (SECURE) Act of 2019. By populating hypothetical situations with popular TV characters, Mitch Cory will make this complicated subject entertaining and easy to understand.
*Mitch Cory – Hickman Menashe, Lynnwood, WA*

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**3 ABLE Update**

Five years have passed since the first ABLE accounts were established. This presentation will review the state of the law including the 2020 final IRS regulations, and discuss how disabled individuals, trustees, and families are using ABLE accounts as a creative and efficient part of their disability planning.
*Angela Macey-Cushman – Somers Tamblyn Isenhour Bleck PLLC, Seattle, WA*

**4 Long Term Care Update**

*Suzanne Thompson-Wininger – Suzanne Thompson Wininger, PLLC, Sumner, WA*

**5 Income Tax and Elder Law**

An experienced CPA will talk about what she has seen in her practice in regards to gift taxes, filing deadlines, estate plans, and more.
*Nika Toce, CPA – Hutchinson & Walter, PLLC, Bellevue, WA*

**6 Using Trusts to Plan for Disability and Long-Term Care**

This lively panel will explore the ways to plan financially for a client's long term needs in the event of disability or long term-health considerations.
*Lynn St. Louis – Elder Law Group, PLLC, Spokane, WA*
*Nancy Lee – Law Office of Nancy J. Lee, PLLC, Puyallup, WA*
*Sean Bleck – Somers Tamblyn Isenhour Bleck PLLC, Seattle, WA*
*Nika Toce, CPA – Hutchinson & Walter, PLLC, Bellevue, WA*

**7 DNRs, POLSTs, and Directives: Counseling Clients on End of Life Choices**

Learn by examining samples of several documents clients may wish to consider as they plan for the end of their life.
*Neil Sarles – Law Office of Neil R. Sarles, Seattle, WA*
*Robert Free – End of Life Washington, Seattle, WA*

**8 Legislative Update**

*Sage Graves – Hickman Menashe, Lynnwood, WA*
*Megan Farr – Farr Law Group, PLLC, Enumclaw, WA*