2016 Annual Report

Division/Section/Committee Title: ELDER LAW SECTION

Date: December 12, 2016

Chair: Patricia M. Galindo

Activities Undertaken Since Last Report:

As in prior years, the Board met on a regular bi-monthly basis. There was a quorum at each of the monthly meetings, and at the Annual Meeting which was held in conjunction with our Spring CLE on May 15, 2016.

**CLE Programs:** During the past year, the Section sponsored its annual CLE featuring Kristen M. Lewis from Gambrell & Russell, LLP. The topics included: Planning for Beneficiaries with Special Needs (speaker - Kristen M. Lewis), Life Care Planning in Estate Planning (speaker - Joan Schofield, RN, BSN, MBA, CNLCP, MedView Med-Legal & Case Management Specialists), Legislative Update for Special Needs (speaker - Johanna Pickel, Johanna Pickel LLC), The ABLE Act (speaker - Nell Graham Sale, Pregenzer Baysinger Wideman & Sale PC) and Advanced Special Needs Trust Drafting (speaker – Kristin Lewis). In addition to the CLE program, two board members were part of a panel discussion at the Annual Bench and Bar Conference (Allison Block-Chavez and Patricia Galindo). The panel presentation was titled Guardianship 101: The Role of the Petitioning Attorney and was the most attended break-out for its time slot.

**Community Program:** The board made an effort to reach out to law students this past year by focusing on two main events. First, two board members (Allison Block-Chavez and Patricia Galindo) led a case study discussion in Professor Suzuki’s class, Legal Issues of the Elderly. The case study focused on Casey Kasem’s real life battles between his wife and children and included role playing exercises and ethical dilemmas for the attorneys involved. The Adult Visitation Bill which was introduced at this year’s legislature was also discussed. Also during the Fall 2016 semester, two board members and a Section member were part of a panel discussion held during the lunch hour at the law school. The panel focused on careers in Elder Law and was very well attended. The panel provided a general overview of the variety of professions that encompass elder law and answered questions from the students. The Section provided food for both of these events.

**Ongoing Activities:**

**Publications:** While the board did not directly participate in any publications this year, it did send the members an E-blast reminder that highlighted recent changes to the Probate Code and directed members to an article written by Jack Burton and Fletcher Catron and that was published in the Bar Bulletin. The e-blast uncovered a mistake in the original article and was well received by members of the Section.
**Young Lawyers Division:** The Section receives regular updates from the YLD through the Section’s YLD liaison. In addition, another board member is also a YLD board member. The Section strives to find opportunities to collaborate and communicate on issues relevant to both the Section and YLD and many members serve as informal mentors to newer attorneys practicing in the area of elder law. The Board is receptive to working with YLD on new initiatives and program in the next year.

**Law School Efforts:** The Board voted to allocate funds for an Elder Law Fellowship in 2017. The criteria for the Fellowship will be determined by a sub-committee in early 2017. Despite having the law student position vacant for most of the year, another law student (Lauren Kedge) was unanimously approved at the November 2016 meeting. The law student was recruited at Professor Suzuki’s seminar class earlier in the semester and will serve as a liaison between the Section and the law school for future events.

Very Truly Yours,

/s/ Patricia M. Galindo

Patricia M. Galindo, JD
Chair – Elder Law Section