

Planning for Loved Ones with Special Needs

Thursday, March 7, 2019
Oklahoma Bar Center
1901 N. Lincoln Blvd.
Oklahoma City, OK 73105

Program Planner:

Donna J. Jackson, Donna J. Jackson & Associates, PLLC, Oklahoma City

- 8:30 a.m. Registration (w/ Continental Breakfast)**
- 9:00 a.m. Intro to Special Needs Trusts and Trust Administration**
Barb Helm
Arcare of Kansas City and Oklahoma City
- 9:50 a.m. Break**
- 10:00 a.m. cont'd**
- 10:50 a.m. I May Have Dementia, but I'm NOT Incapacitated (ethics)**
Donna J. Jackson
- 11:40 a.m. Networking Lunch (included in registration)**
- 12:10 p.m. What Every Estate Planner Needs to Know About Special Needs Trusts**
Samantha Shepherd
Shepherd Elder Law Group, LLC
Kansas City, MO
- 1:50 p.m. Break**
- 2:00 p.m. Paying Retirement Benefits to Special Needs Trusts**
Mark Munson
Shepherd Elder Law Group, LLC
Kansas City, MO
- 2:50 p.m. Adjourn**
- Sponsors: Arcadia Trails**