

**REGISTRATION FORM** - "Estate Recovery and Getting Your Legal Documents in Order"

**July 22, 2014 • 9:00 am - 12:15 pm**

Piketon Comfort Inn, 7525 US Route 23, Piketon, Ohio 45661

Trainer: Thomas G. Bedall, Esq. and Matt Barnes

**\$50 Fee Per Person - Checks Payable to Area Agency on Aging District 7, Inc.**

**Title III Provider - Call for Registration Cost (Grant Money MAY be Available)**

**REGISTRATION DEADLINE:**

July 15, 2014

**NO REFUNDS After Registration Deadline**

☐ Social Worker ☐ BENHA

☐ RN ☐ Other

Agency/Facility Name \_\_\_\_\_

Agency/Facility Address \_\_\_\_\_

Name(s) of Participant(s) \_\_\_\_\_

Total Number Attending \_\_\_\_\_ Total Amount Enclosed \_\_\_\_\_

Please return completed registration form to:

Area Agency on Aging District 7, Inc. • Attn: Debbie Crawford • F32-URG PO Box 500 • Rio Grande, Ohio 45674-0500  
Questions? Call Debbie Crawford at 1-800-582-7277 • Fax - (740) 245-0029 • E-Mail - dcrawford@aaa7.org



Area Agency on Aging District 7, Inc.  
F32-URG PO Box 500  
Rio Grande, Ohio 45674-0500

# Estate Recovery and Getting Your Legal Documents in Order



**July 22, 2014**

Piketon Comfort Inn  
7525 US Route 23  
Piketon, OH 45661

**\$50 Charge Per Attendee**  
**CEUs Available**



## **Estate Recovery and Getting Your Legal Documents in Order**

*This program is designed to educate the social service professional on the subject of Medicaid Estate Recovery, enabling them to educate their consumers and families on the topic, and to gain a better knowledge in order to answer questions and concerns. In addition, attendees will gain knowledge about the legal documents necessary for future planning in order to better educate consumers and families so that their wishes are followed and honored.*

## **The Presenters**

### **Thomas G. Bedall, Esq.**

*Thomas G. Bedall is a 1978 graduate of the University of Akron, College of Law, the same university where he received his undergraduate degree. His 33-year legal practice has been dedicated to helping low income Ohioans. In doing so, he has practiced before all levels of Ohio courts including several appearances before the Ohio Supreme Court, as well as litigating federal class actions and appeals. Tom has specialized in elder law since joining Pro Seniors in 1993. He is Pro Seniors' Managing Attorney and a frequent speaker on the topics of Medicare, Medicaid, healthcare decision making, and other areas of elder law.*

### **Matt Barnes**

*Matt Barnes serves as an attorney for Pro Seniors, Inc. He received his bachelor's degree from Miami University (Ohio) and is a 2013 graduate of the University of Cincinnati Law School. Matt spent his internship at Pro Seniors and joined the staff in September 2013. Matt was awarded an Equal Justice Works (EJW) Fellowship for specialized project work at Pro Seniors that focused on the assistance provided for Ohio seniors with learning about and applying for public benefits. In addition, Matt works with other senior care providers in the area through presentations and providing information.*

## **Estate Recovery AGENDA**

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8:30 am - 9:00 am

REGISTRATION

9:00 am - 10:00 am

Estate Recovery

10:00 am - 10:30 am

Getting Your Legal  
Documents in Order

10:30 am - 10:45 am

BREAK

10:45 am - 11:15 am

Getting Your Legal  
Documents in Order (continued)

11:15 am - 12:15 pm

Financial Power of Attorney

12:15 pm

Evaluations



## **Course Objectives**

### **Estate Recovery**

*After the course, participants will be able to:*

- Describe how Medicaid Estate Recovery applies to consumers enrolled in Medicaid programs.
- Explain the process the State of Ohio uses to recover assets of consumers enrolled in Medicaid programs.
- List resources for consumers and families with questions about Estate Recovery.
- Recognize consumer situations where a referral to an attorney/estate planning professional is indicated.

### **Legal Documents in Order**

*After the course, participants will be able to:*

- Define what is probate.
- Understand the difference between legal documents that can be used in the management of an estate.
- Gain a better understanding of advanced directives in order to assist consumers as they consider future planning.

### **Financial Power of Attorney**

*After the course, participants will be able to:*

- Define what is a Financial Power of Attorney (POA).
- Gain a better understanding of financial POA in order to assist consumers as they consider future planning.

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*Approved by the Ohio Social Work Board for three (3) hours of CEUs for social workers, counselors, and marriage and family therapists - #RCS011402 The Ohio Board of Nursing accepts social work hours for RN CEUs. Approved for three (3) CEUs with the Board of Executives of Long-Term Services and Supports (BELTSS - formerly BENHA) - #173-C-14.*

*The Area Agency on Aging District 7, Inc., does not discriminate on the basis of race, color, sex, religion, national origin or disability. If you need special accommodations due to a disability, please indicate so on the registration form.*