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PROPER PLANNING MAY CREATE PEACE OF MIND



July 2004

Benefits of Teaming Up With An Elder Law Attorney

Recently, elder law attorneys and trial attorneys have forged a relationship that ensures the provision of quality expert advice and service to clients. If you ask yourself “how can collaborating with an elder law attorney improve the services I provide to my injured clients” look no further. An elder law attorney’s expertise provides the following benefits:

1. Advising the client how to **obtain or maintain government assistance** eligibility (Medicaid; SSI) when they receive a settlement.
2. Preparing a **Special Needs Trust** for a disabled plaintiff, and educating the trustee on administering the trust.
3. Preparing a **Durable Power of Attorney** for a competent plaintiff so that if during the litigation the client becomes incapacitated a guardianship is not needed.
4. Initiating and administering **guardianships for incapacitated adults as well as minors** in order to have a named plaintiff advance the lawsuit, settle the law-

suit, and protect the proceeds.

5. Advising the trial attorney, especially during mediation or settlement conferences, **how allocating settlement proceeds to a spouse or a minor’s derivative claim presents unique issues when the spouse or minor child receives Medicaid or SSI.** Advance planning must be done to ensure there is no loss of government benefits.

Our office has written a Florida Bar approved CLE Course entitled “Preserving the Personal Injury Settlement For the Aged and Disabled Client.” The course explores: the Medicaid Third Party Liability Act, the Medicaid Estate Recovery Lien, the attorney’s ethical obligation, and valuable tips for avoiding legal malpractice and providing value added service. The course is approved for 2 hours of CLE credit, and 1 hour of credit toward trial law certification. This course can be presented in the privacy of your office’s conference room during the lunch hour for the attorneys and legal assistants. There is no charge to attend the seminar. Attendees will receive written course materials as well as a helpful desk reference guide on guardianship and special needs trusts. Call Andrea to

“A Board Certified Elder Law Attorney provides value added service to the trial attorney’s clients.”

schedule the presentation.

ANNOUNCEMENTS:

Stephanie is the Past Chair of The Florida Bar Elder Law Section.

Our firm is a proud Business Patron of the Eagle Program of the Academy of Florida Trial Lawyers.

Meet The Staff

Bonnie Hale-Legal Assistant

- Special Needs Trusts
- Medicaid & SSI
- Nursing Home/ALF Resident Rights
- Estate Planning

Flo Koplo - CLA

- Guardianship
- Probate
- Trust Administration
- Court Appointments

Myrna Hambro-Secretary

Regina Walsh-Assistant

Andrea Pinsonneault-

Marketing/Public Relations Coordinator