



Benefits of 529A ABLÉ Accounts for Individuals with Disabilities



This program has been approved for practice and procedure credit under Maine's reciprocal admission rule.

DATE: April 16, 2019
SCHEDULE: Log-In: 9:45 a.m. | Live Webinar: 10:00 - 12:35 p.m.
CREDITS: 2.5 (PRACPRO)

Agenda and Schedule

10:00 WHO BENEFITS FROM SPECIAL NEEDS PLANNING?

- Identifying the Beneficiaries
- Overview of Means-Tested Public Benefits: Supplemental Security Income (SSI), Medicaid (MaineCare), SNAP and Housing Benefits
- Where Do Social Security and Medicare Fit In?
- Obtaining and Retaining Means-Tested Public Benefits
Doug Jackson & Jane E. Skelton, Esq.

10:45 SPECIAL NEEDS TRUSTS

- Types of Trusts
- Which Trust for the Job?
Jane E. Skelton, Esq.

11:10 SHORT BREAK

11:15 WHAT IS THE ABLE ACT?

- History of the ABLE Act
- Overview and Availability of ABLE Accounts
- Ohio's STABLE Account
- Mechanics of the STABLE Account
- Qualified Disability Expenses
- Tax Planning with ABLE Accounts
Doug Jackson & Jane E. Skelton, Esq.

12:00 ADVISING CLIENTS

- Limitations of ABLE Accounts
- Creative Planning with ABLE Accounts
- Advanced Planning with Both SNTs and ABLE Accounts
Doug Jackson & Jane E. Skelton, Esq.

12:35 WEBINAR ADJOURNS

Faculty

Doug Jackson, Deputy Director
STABLE Accounts, Troy, OH

Jane Skelton, Esquire
Maine Elder Law Firm, Bangor
A practice of Rudman Winchell

How to Register for the Live Webinar

Type mainebar.org in your browser. You do not need to log into your website account at www.mainebar.org.

1. Under **CLE/Education** click **Register for CLE**.
2. Locate this program in the Community Calendar and click on the program to register.

You will access this CLE program through a **third-party website**, which will require a username and a password. **Please note that your MSBA login credentials will not work on this website.**

You will receive a confirmation via email. Program materials will be uploaded to your registration account when they are available.

If you register for this webcast and are unable to view it on the day of the webcast presentation, you will receive a link following the webcast and will have three months from the date of the webcast presentation to view the program. Please note if you view the webcast after the program date, the seminar qualifies for self-study credits.

Credits will be reported by the MSBA according to recorded attendance for the webcast.

Registration Fees

MSBA Member	\$ 95
CLE Club Member	\$ 75
Support Staff of CLE Club Member	\$ 75
Non-Member	\$125
Paralegals and Legal Support Staff	\$ 80
MSBA Student Members	\$ 15
Non-attorney Elder and Financial Professionals	\$ 95

CLE Club Membership: MSBA Members only

From now through Sept. 30, 2019: \$165

Call the CLE Department for more information.

