Helping Elderly and Disabled Clients:

# A LIFE-CYCLE APPROACH

The "life cycle" approach of this session is intended to help attorneys advise their clients appropriately and in so doing... **improve their quality of life.**

**THURSDAY**
**MAY 30, 2019**
**1:00 PM - 3:30 PM**

**CREIGHTON UNIVERSITY SCHOOL OF LAW**
**2133 CASS STREET ▪ OMAHA**

*This CLE brings together experts from across the spectrum of elder and special needs services for a panel discussion of the issues that families face when caring for loved ones who are disabled or advancing into their golden years. This session is aimed at providing attorneys with valuable information on topics such as Medicaid and other forms of long-term care planning, financial tools such as special needs trusts and ABLE accounts, home modification and transition services, end-of-life planning, and dealing with care facilities. As advances in health care have extended the lifespan of many disabled and older individuals, it is more important than ever for attorneys to be aware of the services available and to serve their clients as effective members of their care planning team.*

## PANEL OF EXPERTS

### NICCI L. CLARK, Finacial Advisor CFP | Morgan Stanley Wealth Management

After graduating from the University of Nebraska-Lincoln with a B.A.B.S. in Finance, Nicci attended Creighton Law, where she earned a J.D., specializing in corporate law. After several years of private practice, she taught Financial Planning and Insurance at Mississippi State University and served as Executive Director for a multi-national non-profit in Europe. She joined Morgan Stanley Wealth Management as a Financial Advisor in 2013 and has clients in over 30 states. In April 2019, she joined The Omaha Group at Morgan Stanley.

### ANDREW DIEDIKER Senior Advisor | Simple Senior Solutions, LLC

Andrew Diediker started his profession in a skilled nursing facility as a dietary aide in 1996. He joined the Army in 1999 and is currently in the United States Army Reserve (USAR). He received his degree in recreational therapy from the University of Nebraska Omaha (UNO). While in college, Mr. Diediker worked in Skilled Nursing, Assisted Living, Independent Living, and Memory Care. After graduating from UNO he took a lead roll as a recreational coordinator in a skilled community. Mr. Diekiker has also had the opportunity to open two Assisted Living communities, one being specifically Memory Care. He went on to get his graduate in Healthcare Administration through Bellevue University. He and his wife recently started up Simple Senior Solutions, which is a company that assists anyone looking into Senior Living Communities. They are senior advisors, making sure that that whoever is looking gets the right information.

### BEVVAN PHILLIPS Occupational Therapist | Key Complete Therapies

BevVan Phillips, OTR/L, CAPS, is an Occupational Therapist who has specialized in residential environmental modification and assistive technology for over 20 years in the private, government, and non-profit sector. She is currently employed as the Home Modification Program Coordinator at Key Complete Therapies in Omaha, Nebraska.

She is both a licensed Occupational Therapist in Nebraska and Iowa, and a Certified Aging in Place Specialist through the National Association of Home Builders. She completed the program for Executive Certificate in Home Modification through USC Leonard Davis School of Gerontology and the National Resource Center on Supportive Housing and Home Modification. An avid lifelong learner, she has worked as a Realtor and continues to take construction technology courses to fully understand all aspects of the home. She is a well known regional speaker on the benefits of home modifications and assistive technology on successful rehabilitation, aging in place, and quality of life.

### DIANE STEWART Enable Outreach Specialist | First National Bank

Diane Stewart joined First National Bank in 2017. As the Outreach Specialist, she facilitates product training to diverse audiences ranging from personalized presentations to remote or on-line-based forums. Participating in community outreach programs is a key focus and development of relationships with partners and centers of influence. Ms. Stewart has over 30 years of Banking Experience and Decades of serving in Leadership roles with Local Non-profits such as United Cerebral Palsy and Quality Living, Inc. Ms. Stewart is a graduate of Nebraska Wesleyan University and has a Series 6 FINRA Securities License.

### CATHERINE N. SWINIARSKI, ESQ. Elder Law of Omaha, PC LLO

Catherine Swiniarski received her Juris Doctorate from Creighton University School of Law in 1986. Since that time she has practiced law in a variety of settings, from corporate to private practice. In addition, she has taught legal topics at several Omaha area colleges and universities. She has settled into the practice of Elder Law, an emerging area that has grown dramatically with the aging of the baby boomers. She enjoys the opportunity to practice law in a more holistic, largely non-adversarial environment.

### RACHEL A. TRUHLSEN, ESQ. Rachel A. Truhlsen Law Office, PC LLO

Rachel Truhlsen offers legal services in the areas of estate planning, probate administration, trust administration, elder law planning, long-term care planning, Medicaid eligibility and asset protection. She also advises clients on the potential tax issues that may affect these areas of practice. Ms. Truhlsen received her Juris Doctor from Creighton University School of Law.

### DAVID M. THOMPSON, ESQ. {MODERATOR} Carlson & Burnett, LLP

David M. Thompson is an Associate Attorney on Carlson & Burnett's estate planning team. Prior to joining the firm, David was a sole practitioner in Omaha whose practice focused on guardianships and conservatorships, Medicaid planning, veterans' benefits, and end-of-life planning. David earned his B.A. at the University of Nebraska-Lincoln with distinction, then attended Oxford University on a Marshall Scholarship. After returning to the United States, David moved to Chicago where he completed his doctoral studies at the University of Chicago. He earned his Juris Doctor from the Northwestern Pritzker School of Law, where he served as Editor-in-Chief of the Northwestern University Law Review. Prior to returning to Omaha, Mr. Thompson practiced at a large Chicago firm, did fundraising for non-profit organizations, and worked as a higher education administrator.

**APPROVED FOR 2.5 CLE CREDIT HOURS**

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NEBRASKA State Bar Association

[REGISTRATION FORM]

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# A LIFE-CYCLE APPROACH

Thursday May 30, 2019

1:00 pm - 3:30 pm

☐ I will attend the live seminar at
Creighton University School of Law
Room 124
2133 Cass Street
Omaha

☐ I will attend the seminar via live webcast

☐ $160 - Regular Registration

☐ $125 - NSBA voluntary dues-paying member

☐ FREE - Law Student

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