

NATIONAL ACADEMY of ELDER LAW ATTORNEYS MASSACHUSETTS CHAPTER MEETING NOTICE



Thursday, March 24, 2022
5:30 PM – Reception - 6:00 PM - Dinner Meeting

*******NEW VENUE*******
Hilton Garden Inn Worcester,
35 Major Taylor Blvd, Worcester, MA 01608

(Parking in the Garage Across from the hotel will be validated 30 Major Taylor Blvd, Worcester, MA 01608
[Entrance on MLK, Jr. Blvd. or Thomas St.])

2021 – What Did You Miss?

Join us for our first in-person dinner meeting in two years! Our panel of speakers will discuss some of the biggest updates to Elder Law in 2021. Some of the topics that we will address are:

- Real Estate Issues (Four unities of title);
- Guilfoil Case and Nominee Trusts (Making a comeback?);
- Fournier Case (Powers of Appointment);
- DeFazio/Hirvi Settlement (Practical take-aways for all members);
 - Denial Notice Requirements;
 - Timely Fair Hearings;
- Estate Recovery; and
- Remote Notary.

We look forward to seeing everyone soon!

SPEAKERS



Attorney Karen B. Johnson is a co-founder of the law office of Madge & Johnson, PC, a law firm concentrating on estate planning and elder law, located in Westford, Massachusetts. Karen is a graduate of Duke University School of Law and holds an advanced degree (LLM) in Taxation from Boston University School of Law. She has been a practicing attorney since 1994. As an Elder Law and Estate Planning attorney, Karen offers her clients a wide array of planning services, from planning for incapacity and simple wills to helping multi-generation millionaire families utilize their estate tax credits efficiently. Karen advises clients on how best to transfer and protect their assets. She also helps clients apply for Medicaid and other governmental assistance programs.

As an educator, Karen has taught lawyers how to draft estate plans as an Adjunct Professor at Western New England School of Law and currently with MCLE. Karen has been designated as a Massachusetts Super Lawyer from 2015 to present.



Attorney Lisa M. Neeley is a partner with the law firm of Mirick, O'Connell, DeMallie and Lougee, LLP, in Worcester, Massachusetts, where she is Chair of the Trusts and Estates practice group. Lisa concentrates her practice in assisting clients obtain Medicaid eligibility for both long-term and community-based care, including the planning and preparation of Medicaid applications and appeals, special needs and disability planning, and general estate planning. She is a Fellow with the American College of Trust and Estate Counsel (ACTEC) and a member of the Massachusetts Chapter of NAELA. Lisa earned her BA degree, cum laude, from Assumption College and her law degree, cum laude, from New England School of Law.



Attorney John Welch established Life Care Planning Law Group, PC in Salem, Massachusetts dedicated to providing comprehensive legal care to elders and the disabled. Earning his CELA designation in 2018 was the culmination of his commitment to a comprehensive style of practice. Through his domestic practice and work with the Battered Women's Legal Assistance Project at Neighborhood Legal Services assisting low-income clients in complex domestic relations matters, and the Elder Battered Women's Project through the Greater Lynn Senior Services assisting tenacious and frightened victims in long term marriages, John has developed community relationships, contacts, and experience that result in frequent court appointments as a fiduciary, advocate, and investigator. He has transferred his domestic litigation skills to his current probate and estate planning practice where he frequently acts as GAL. John has a keen interest in administrative fairness issues affecting MassHealth applicants and the unique difficulties facing the elderly and disabled. He is an active member of the Massachusetts Chapter of NAELA, the Essex County Bar Association, the Boston Bar Association, and the Massachusetts Bar Association. John graduated from Bowdoin College in Maine and University of Maine School of Law in 1990.

NOTICE TO BOARD OF DIRECTORS AND COMMITTEES

The following meetings will be held at the **Hilton Garden Inn Worcester** prior to the Dinner Meeting. Please check the hotel schedule of events for meeting locations.

MassNAELA Advocacy Meeting 3:30 – 5:30 pm

For More Information: Call Clarence Richardson at (617) 566-5640

- **REGISTER and PAY ONLINE AT www.MassNAELA.com OR**
- **REGISTER ONLINE and then SEND PAYMENT by US MAIL to: MassNAELA, P.O. Box 600046, Newtonville, MA 02460**

FEES

MassNAELA Member or Attorney Guest	Law Student
\$65.00 per person	No Charge

******Attendance is limited to 80 people, so sign-up early.******

REGISTRATION

MassNAELA Members may be accompanied by non-attorney employees, attorney guests, and law students. Attorney guests may attend up to two meetings before deciding to become a member. If you are not a member of National NAELA and the Massachusetts Chapter, and are a licensed attorney or law student, consider joining now. For membership information, visit our website www.MassNAELA.com and click on “Become a Member.”

Step One: Online Registration

Please register online at www.massnaela.com. You must register online, whether or not you pay online. To receive your program materials electronically prior to the meeting, please register two days before the meeting. Materials will not be available at the meeting.

Step Two: Payment

Option 1: Online Payment: Submit credit card payment information when prompted and complete the registration process.

Option 2: Off-line Payment by credit card or by check: After completing Online Registration, please complete and return the following form with your preferred method of payment. (This form should not be used in lieu of registering online.)

Off-line Payment by Credit Card or by Check:

Name _____ Firm _____

EMAIL Address: _____ Tel: _____

Meeting Date: _____ Program Title: _____

Check One:

- ☐ Check payable to MassNAELA enclosed

Name on Check _____

Check No. _____

Amount _____

- ☐ Credit Card (Please bring the credit card you wish to pay with to the dinner meeting and it will be processed at the registration table.)

After registering online, please submit completed form by:

- US Mail Only to: MassNAELA; P.O. Box 600046; Newtonville, MA 02460

For more information: Call Clarence Richardson at (617) 566-5640