

## **Event Title:**

Asset Management in Elder Law for Paralegals

## **Event Date and Time:**

May 21, 2024 -- 02:00 PM EDT - 03:00 PM EDT

## **Event Agenda:**

*All times are shown in Eastern time.*

*2:00 - 3:00, Julian F. LaCasse*

- I. Identifying and Understanding Types of Assets Clients Use
- II. Gathering and Organizing Financial Documents
- III. Assisting With Asset Transfers (Including Real Estate Transfers)
- IV. Financial and Medicaid Planning Insights
- V. Long-Term Care Insurance and Other LTC Funding Options
- VI. Investment and Financial Planning Essentials

## **Event Description:**

Paralegals working in elder law play a vital role in assisting attorneys with asset management for their clients. To effectively perform this role, paralegals need a strong understanding of various aspects, including common types of assets, the mechanics of common asset transfers, gathering and organizing financial documents, benefits eligibility, and more. This cogent summary will give you the information you'll need to get (and stay) up to speed. Register today!

- Distinguish between Medicaid excluded and included assets.
- Get practical tips for obtaining and organizing financial information.
- Explore common types of assets aging clients use and their forms of ownership and transfer.
- Understand LTC insurance and other care funding options.

## **Who Should Attend:**

This **intermediate level course** is designed to give paralegals the knowledge they need to assist attorneys with elder care planning. Those who should attend include:

- Paralegals
- Legal Technicians
- Legal Assistants
- Legal Support Staff

## **Event Bio:**

**[Julian F. LaCasse](#)** is an of counsel attorney with Gadi Zohar whose practice focuses on estate, business and tax planning, administration of decedents' estates including trust

and probate administration, and various business matters such as creation, administration, governance and succession of entities. He studied writing and philosophy at Gonzaga University before earning his J.D. degree from Santa Clara University School of Law. While attending Santa Clara University School of Law, Mr. LaCasse pursued diverse interests through his work in Congress for Representative Sam Farr, a fellowship with former Secretary of Defense Leon Panetta, and publishing online on the topic of bail reform and policy, on his way to earning a Public Interest and Social Justice Law Certificate. He is admitted to practice in California.