



Supplemental Needs Trusts for Personal Injury Attorneys

Wednesday, August 16, 2017 - 1:00 p.m. - 2:00 p.m.

BAEC, 438 Main Street, Buffalo

1.0 CLE credit: Areas of Professional Practice

Speakers:

Brian J. Alterio, Esq., *Small Law Firm*

Courtney J. Donahue, Esq., *Lippes Matthias Wexler Friedman, LLP*

Mary C. Szabat, CFP, *Vice President, Investment and Financial Planning Officer, Wealth Strategies Group, Canandaigua National Bank & Trust*

This Midday Learning Lecture will provide personal injury attorneys with information regarding supplemental needs trusts, including how to utilize this type of trust to protect a plaintiff's net settlement proceeds as well as right to government benefits, such as SSI and/or Medicaid following the conclusion of a case. The speakers will also discuss the advantages and disadvantages of this type of trust, including items that are traditionally approved by the trustee for the use of the plaintiff. Anyone who handles personal injury actions on behalf of plaintiffs will not want to miss this informative lecture.

Erie Institute of Law Registration Form - Supplemental Needs Trusts for Personal Injury Attorneys



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\$5 Hard copy of material

The Erie Institute now provides material via electronic delivery. Please be sure to add your email address below. If you would like a hard copy, check the box above and add \$5 to the registration fee. Thank you.

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Accreditation: The Erie Institute of Law has been certified by the New York State Continuing Legal Education Board as an accredited provider of continuing legal education in the state of New York.

Cancellation Policy: If you are unable to attend a seminar for which you have already registered, call the CLE department at 852-8687. For a full refund, notice of your cancellation must be received 48 hours in advance of a program. **Cancellations received less than 48 hours in advance are subject to a \$5 administrative fee.** Registrants who are pre-registered and fail to attend will receive course materials in lieu of a refund.

Mail or Fax to: Erie Institute of Law, 438 Main Street, Sixth Floor, Buffalo, New York 14202, (716) 852-8687, Fax (716) 852-7641. Register online at www.eriebar.org. Tuition assistance available. Please call to request an application.