

THE ESTATE PLANNING COUNCIL OF HAMPDEN COUNTY, INC.**LUNCHEON MEETING NOTICE**

Date: Tuesday, January 10, 2012
Place: Colony Club
Time: 11:45 a.m. - 1:00 p.m.
Speaker: Ken W. Shulman, *Day Pitney, LLP*

Topic: Special Needs

According to the U.S. Census Bureau, in 2008, 19% of Americans have a disability. This percentage equals the population of the states of FL and CA combined and is expected to increase. Special Needs require special planning. In this informative session, you will learn when a Special Needs Trust is needed. You will also learn how Special Needs Trusts are drafted, funded and administered. This presentation will also provide an overview of the specialized trustee issues that surround Special Needs Trusts.

About Ken Shulman:

Ken Shulman is a Partner with Day Pitney, LLP and practices in their Boston office. He received his B.A. with Distinction from Northwestern University in 1971 and his J.D. from Boston University School of Law in 1974. His general estate planning practice includes estate planning and related issues for elders and for families who have disabled children. He is a former board member of the Massachusetts Chapter of the National Academy of Elder Law Attorneys. Ken regularly speaks to consumer groups, professionals in the field, and others interested in issues related to aging, disability, advocacy, financial planning, and the preservation of government entitlements. He previously served as a board member for several human service agencies, including the Greater Boston ARC. He has also served as a consultant to the Massachusetts Office of Handicapped Affairs, the Massachusetts Disability Law Center, and the Massachusetts Mental Health Legal Advisors Committee. Currently he is cochairman of the Elder and Disability Planning Committee of the Boston Bar Association, and is a member of the Board of Directors of the Asperger's Association of New England and he serves on the Combined Jewish Philanthropies Committee on Disabilities and on its Committee on Caring and Social Justice.

Ken frequently represents clients in guardianship matters and often serves as a Trustee for families. Ken is a frequent participant in lawyer training sessions sponsored by the Massachusetts Continuing Legal Education organization and a regular contributor to their publications, having cochaired conferences on estate planning and preserving eligibility for government benefits for elderly and disabled clients. He has been a featured speaker on Medicare and Medicaid Liens in Personal Injury Cases at several MCLE Elder & Disability Law Conferences and he is the author of the chapter entitled "Planning for the Disabled Child" in Estate Planning for the Aging or Incapacitated Client in Massachusetts, MCLE (revised 2007). He is a regular speaker on various legal issues affecting the elderly and disabled at seminars sponsored by the Suffolk University Law School, Center for Advanced Legal Studies, the Boston Bar Association, the Massachusetts Bar Association, and PESI. Ken recently co-authored Managing a Special Needs Trust: A Guide for Trustees, DisABILITIESBOOKS, Inc. (2010).

Rosters and name badges will be distributed at this meeting to paid members.

Future Regular Meeting Dates (all of which will be held at the Colony Club):

February 14, 2012
March 13, 2012
May 8, 2012

Please mark your calendars, and if a corporate check is needed, be sure to request it early, so that it arrives

before the published due date for each meeting.

Any additional meetings will be announced separately.

Menu: COLONY CLUB BUFFET --- Cost: Paid Members \$22.00 Nonmembers \$25.00*

Note: Guests attending more than twice per year are expected to apply for membership.

*If your dues are not paid, you are a nonmember.

**RESERVATIONS AND PAYMENT FOR THE LUNCHEON MUST BE RECEIVED
BY TUESDAY, January 3, WITHOUT EXCEPTION.**

(If you are prepaid, you must let us know if you are coming or not coming. Space will not be reserved for non-respondents.)

Please Note: "Prepaid" refers to 6-for-5 offer.

NO CASH AT THE DOOR.

Please reserve by e-mail to estateplan_hc@dejazzd.com and send reservation form with payment to:

The Estate Planning Council of Hampden County, Inc.
c/o Joan Peterson
A Way With Words
12845 Old Turnpike Road
Mifflinburg, PA 17844-8009
Cell Phone: 413.563.7057

Note: If you are reserving late, please use e-mail or phone so we can arrange adequate seating.

Name _____

Company/Firm _____

Yes, I will attend on **January 10, 2012** ____ No, I can't attend. ____
\$22 enclosed. ____ I have prepaid for all meetings (6 for 5 offer). ____
\$25 enclosed. I am a nonmember. ____

I will bring ____ guest(s). \$____ enclosed (\$25 x number of guests)

Please list the name(s) of your guest(s) below:

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Membership Application or Change of Address: <http://www.estateplan-hc.org/application.htm>