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National Academy of
Elder Law Attorneys, Inc.

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SPECIAL NEEDS ALLIANCE NEWS

Oast & Hook attorney Andrew Hook has been elected the president of the Special Needs Alliance (www.specialneedsalliance.com). Mr. Hook is a founding member of the Special Needs Alliance (SNA), and he recently served on its Board of Directors. In addition, in what its leadership has called a reaffirmation of its “roots in advocacy,” the SNA has announced its reorganization as a non-profit organization. The announcement was made as the organization prepares to mark its fifth anniversary at the SNA’s annual meeting this month in Clearwater Beach, Florida.

Founded as a for-profit corporation in 2002 by a small group of disability and elder law attorneys serving the planning needs of individuals with special needs, the SNA now boasts a membership of more than 100 attorneys in 47 states. Membership in the SNA is by invitation only and is limited to attorneys who have proven experience in the areas of estate and trust planning for individuals with disabilities, disability law, and advocacy. The organization’s members have an average of 18 years of relevant legal experience, and a majority of SNA attorneys are also members of families of individuals with disabilities.

“We believe that the spirit of advocacy should stand at the center of the legal profession,” says Edward Wilcenski, current president of the SNA and a special needs planning attorney in Clifton Park, New York. “This restructuring,” Wilcenski remarks, “is consistent with our continuing work as advocates for individuals with disabilities and their families who wrestle with the often overwhelming challenges of navigating the public benefit system and other disability planning issues.”

Mr. Wilcenski adds that the SNA’s move to non-profit status is consistent with its philosophy, which is to use member dues for education for its members, and to support members who provide educational programs to the public and other professionals on the complex areas of special needs trusts and entitlement program eligibility. No SNA member derives any direct financial benefit from the SNA.

Mr. Wilcenski also notes that its non-profit status encourages the SNA's active participation in the dialogue over federal disability programs and policy. "While our primary focus must always be on our clients when it comes to special needs planning," he said, "as attorneys with expertise in this area, we also have an obligation to advocate for change in the areas that impact individuals with disabilities and their families, such as special education, housing, Medicare and Medicaid reform, financial entitlements, and mental health issues."

The SNA provides a range of services to families and professionals including helping families identify qualified attorneys in their communities, assisting family members with planning for the future when they are no longer able to provide care, and assisting other legal professionals in protecting public benefits eligibility for their clients with disabilities. Member attorneys in the SNA are skilled in such services as drafting special needs trusts and wills, advising trustees of special needs trusts, coordinating estate and financial planning, guardianship, conservatorship, and managing litigation proceeds and structured settlements.

For more information about the Special Needs Alliance, please visit its Web site at www.specialneedsalliance.com or phone 877-572-8472.

The attorneys at Oast & Hook, can assist persons with disabilities and their families with their special needs planning, including estate, financial, insurance, and public benefits planning.

Stetson Law School Special Needs Trust Seminar

Oast & Hook attorneys Sandra Smith and Andrew Hook will attend the Stetson Law School's Special Needs Trust seminar (www.law.stetson.edu/conferences/SNT) in Clearwater Beach, Florida on October 19th. After the seminar, they will attend the fall meeting of the Special Needs Alliance. They will report on the seminar and SNA meeting in an upcoming newsletter.

New Developments at Oast & Hook

Oast & Hook is pleased to report three recent developments. First, Oast & Hook has been asked to serve as a contributor to the Gerilaw blog. Please visit the blog at www.gerilaw.typepad.com. Second, attorney Andrew Hook served as chair of a committee of the Virginia Bar Association's Trust and Estates committee studying the new Uniform Power of Attorney Act (UPOAA). The committee has finished its work and has recommended that the Virginia Bar Association support enactment by the Virginia General Assembly of the UPOAA, with some amendments. Oast & Hook attorney Lisa Johnson provided staff support to the committee. Finally, the October edition of *Estate Planning magazine* contains an article written by Oast & Hook attorneys Andrew Hook and Lisa Johnson and New Jersey

elder law attorney Thomas Begley concerning the UPOAA. If you would like a copy of this article, then please phone Jennifer Lantz at 757-399-7506.

Announcement

The elder law firm of Oast & Hook is holding an Advocacy Networking breakfast. This breakfast is designed for professionals and volunteers who work closely with families who have family members with disabilities. It will be held on December 10, 2007, and is entitled: "Planning for Families of Persons with Disabilities." You will find this to be an informative breakfast that will address issues facing your patients or clients, and will provide an opportunity to network with other professionals. For more information, please contact Jennifer Lantz at 757-967-9724.

Oast & Hook

Oast & Hook is an elder law firm. We represent older persons, disabled persons, their families, and their advocates. The practice of elder law includes estate planning, investment and insurance advice, estate and trust administration, powers of attorney, advance medical directives, titling of assets and designations of beneficiaries, guardianships, conservatorships, and public entitlements such as Medicaid, Medicare, Social Security, and SSI, disability planning, income tax planning and preparation, bill paying, account management and reporting, care management, and fiduciary services. We also handle litigation involving these issues, such as will contests and estate administration disputes. For more information about Oast & Hook, please visit our website at www.oasthook.com.

Distribution of This Newsletter

Oast & Hook encourages you to share this newsletter with anyone who is interested in issues pertaining to the elderly, the disabled and their advocates. The information in this newsletter may be copied and distributed, without charge and without permission, but with appropriate citation to Oast & Hook, P.C. If you are interested in a free subscription to the *Elder Law News*, then please e-mail us at eln@oasthook.com, telephone us at 757-399-7506, or fax us at 757-397-1267.

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