



# Massachusetts Chapter

National Academy of Elder Law Attorneys, Inc.

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## Paralegal Course

Speakers: Brian Barreira, Hyman Darling, Leslie Madge, Martha Ramsey and various paralegals.

Date/Time: Tuesday, June 19, 2007 – Continental Breakfast: 7:30, Program: 8:30 – 5:00

Place: Westin Hotel Waltham – Boston  
70 Third Avenue (Exit 27A, Totten Pond Road from I-95 / Rte. 128), Waltham, MA

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### PROGRAM SUMMARY

Long in the making, this is the program Chapter members have been asking for. It is the program designed for paralegals and other support staff. It will provide these staff members with basic information in the areas of:

- Medicaid
- Deeds
- Wills and Trusts
- Health Care Proxies
- Durable Powers of Attorneys
- Probate

In each area the presenters will cover not only the basic law that support staff needs to know, but also the nuts and bolts of getting the job done. Such items as:

- Completing MassHealth Applications
- Interacting with the MassHealth Enrollment Center
- Drafting Deeds and Homestead Declarations
- Simple Wills
- Pour-over Wills
- Wills with Testamentary Trusts
- Revocable and Irrevocable Trusts
- Health Care Proxies
- Health Care Proxy Clauses for Certain Religions
- HIPPA Authorizations
- Durable and Springing Powers of Attorney
- Probating Intestate and Testate Estates

## **SPEAKERS:**

**Brian Barreira** specializes in estate planning, probate and elder law, with offices in Plymouth and Hingham, Massachusetts. He attained an LL.M. in Taxation from Boston University School of Law in 1990 and the status of Certified Elder Law Attorney via the National Elder Law Foundation in 1996. During 1990-1995 he served as Chair of two committees of the American Bar Association on elder law. In 1994, Brian was President of the Massachusetts Chapter of NAELA, and in 2000 and 2002 he received its Outstanding Chapter Member Award. He has moderated and spoken at numerous ABA, MCLE, MBA and NAELA programs and has been widely published on elder law issues.

**Hyman Darling** is a partner in the Western Massachusetts firm of Bacon & Wilson, P.C., where he has practiced since 1981. He concentrates in the areas of Trusts, Estates, Taxes, Estate Planning, Probate, Guardianships and Elder Law. Prior to joining the firm, he was a Trust Officer. Attorney Darling has been a frequent presenter for both MCLE and the Massachusetts Bar Association as well as speaking for many Springfield civic and professional groups. He also has spoken for NAELA at several conferences both locally and nationally. He is also an adjunct faculty member at Western New England College – School of Law and Bay Path College. Attorney Darling is a member of the Special Needs Alliance and is a member of many local planned giving committees.

**Leslie Madge** is the founder of the Law Office of Leslie S. Madge, P.C. the premier estate planning and elder care law office of Acton, Massachusetts. Attorney Madge is a graduate of the New England School of Law and is admitted to practice in both Massachusetts and New Hampshire. She is a past President of the Massachusetts Chapter of NAELA and currently sits on its Board of Directors. Attorney Madge was certified as an expert in elder law by the National Elder Law Foundation. She is the author of Legally Speaking, a regular newspaper column addressing topics of interest to the senior citizen community, as well as a frequent presenter at MCLE, Suffolk Law School, NAELA, CPA groups and insurance associations.

**Martha Ramsey** is the founding partner of Ramsey & Hanesian, LLP, an elder law firm in Hyannis, Massachusetts, that solely provides legal representation in matters which affect elders and disabled persons. She received her B.A. from Hood College and J.D. from the University Of Baltimore School Of Law. In 1988, she established Ramsey & Associates, the first law firm on Cape Cod to practice elder law. Attorney Ramsey has always been active in organizations which serve the senior population. She is a past director of the National Academy of Elder Law Attorneys, Massachusetts Chapter, past President of Elder Services of Cape Cod and the Islands, and council member of the Barnstable Council on Aging. Currently she is serving as a director of the Cape Cod Cooperative Bank and a trustee of the Cape Cod Foundation.

**Senior Paralegals** In addition to these speakers, the panel will also include several senior paralegals skilled at carrying out the work of their attorneys. While the attorneys will explain the “whys”, these experienced paralegals will explain the “how” and provide invaluable information on getting the job done.

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## **DIRECTIONS:**

**From Pike Westbound:** Exit 15. Follow signs for Route 128/I95 North. Take Exit 27A, Totten Pond Road and at the end of the ramp take an immediate U-turn onto Third Avenue, just before the lights. The hotel is on your left. Follow past the hotel and take a left turn, and then another left into the hotel entrance. Free parking is available in the parking garage on your right.

**From Pike Eastbound:** Exit 14 to Route 128/I95 North (Then follow directions above.)

**From Route 128/I95 North or South:** Exit 27A (Then follow directions above.)

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**COURSE RESERVATION FORM**

**PARALEGAL COURSE**

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*Please photocopy and submit a separate form for each registrant.*

NAME: \_\_\_\_\_

ATTORNEY MEMBER NAME: \_\_\_\_\_

IF THIS PERSON IS NOT YOUR IMMEDIATE SUPERVISOR, PLEASE PROVIDE US WITH THE NAME OF YOUR SUPERVISOR (to be used for Course follow-up later): \_\_\_\_\_

FIRM NAME: \_\_\_\_\_

ADDRESS (including zip code): \_\_\_\_\_

PHONE NO: \_\_\_\_\_ E-MAIL ADDRESS: \_\_\_\_\_

*Reservation includes continental breakfast beginning at 7:30 a.m.*

*Please help us with future offerings of this Course:*

If you could attend this Course in any other location, where would that be? \_\_\_\_\_

If there had been a discount for multiple attendees from the same firm, would more people from your firm have registered and if so, how many more? \_\_\_\_\_

**Mail Registration to:**

Ms. Barbara Cohen, Mass. Chapter NAELA, P.O. Box 67137, Chestnut Hill, MA 02467

**Registration is open to MANAELA Members and their staff only.**

*Cost:* \$345 per attendee

**Payment by credit card may be faxed to (617) 734-9758 or mailed to the above address.**

**I authorize the Massachusetts Chapter of the National Academy of Elder Law Attorneys to charge my credit card as follows:**

Amount: \_\_\_\_\_ Credit Card Type  Amex  MasterCard  VISA (*Please check one*)

Account Number \_\_\_\_\_ Expiration Date \_\_\_\_\_ / \_\_\_\_\_

Signature (*Required*) \_\_\_\_\_

**VISIT: WWW.MANAELA.ORG to register for regular meetings.**

You can now log on to the Mass NAELA website to register to attend a regular meeting. You still have the option of paying either by credit card or check.

## **MEMBERSHIP AND EDUCATIONAL SUBSCRIPTIONS INFORMATION**

If you are not a member of National NAELA and the Massachusetts Chapter, and are a licensed attorney, consider joining now. For membership information, visit our website [www.manaela.org](http://www.manaela.org) and click on "Become a Member."

If you are not a licensed attorney or if you are a licensed attorney who is not a chapter member, consider an Educational Subscriptions for the calendar year 2007. **Please not that a licensed attorney can be an Educational Subscriber for no more than two years.** For \$300 per year, the subscription will give you the Chapter newsletters, and allow you to attend programs at the member rate beginning in January.

The Massachusetts Chapter of the National Academy of Elder Law Attorneys, Inc. is a tax exempt 501(c)(6) organization. The cost of an Educational Subscription is not deductible as a charitable contribution for income-tax purposes, but may be a deductible in part as a business expense. The Mass Chapter estimates that 21.66% of your 2007 Educational Subscription fee is allocable to lobbying activities and therefore not deductible for income-tax purposes as ordinary and necessary business expenses.

## **MASSACHUSETTS CHAPTER NATIONAL ACADEMY OF ELDER LAW ATTORNEYS VENDOR AND ADVERTISING PACKAGES**

**MEETING VENDOR:** Display literature at dinner meetings and/or education programs. NAELA will provide a 6 foot table for display, a guest pass for one representative to attend the meeting, and a verbal acknowledgement of participation by the meeting coordinator. Vendor provides signage and materials. Only vendors may distribute or display literature. The costs are:

**\$125/site at annual scattered site breakfast meeting; \$325/meeting at the MANAELA dinner meetings;**

**\$500 at the MANAELA Fall Symposium**

**ADVERTISING OPPORTUNITIES:** Advertising space is available in the *Massachusetts NAELA News*, a substantive newsletter published at least 7 times per program year (September – June). Publication dates are determined by the dinner meeting schedule and occur approximately every 6-8 weeks. Advertisements will be placed on a newly designed advertisers' page. The newsletter is distributed to nearly 500 Chapter members and educational subscribers; all professionals who work with elders everyday.

Advertising costs for individual ads range from \$100 (business card) to \$500 (full page). There are discounts for a full year of advertising.

For a copy of a sample newsletter, to discuss available meeting dates for vendorship, for sign-up forms or for more information, please contact Barbara Cohen, Chapter Administrator at (617) 566-5640.



Mass Chapter NAELA  
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Chestnut Hill, MA 02467