



# Planning for the Future for Children and Adults with Intellectual and/or Developmental Disabilities



Training Department

Presented by  
**Brian Rubin, Attorney/Parent**  
**Sherri Schneider, QIDP/Parent**  
**Benjamin Rubin, Attorney/Sibling**



Training Department

## AGENDA

8:30 - 9:00 a.m. - **Registration and Coffee**

9:00 - 9:05 a.m. - **Welcome and Introductions**

9:05 - 10:20 a.m. - **Government Benefits, presented by Sherri Schneider**

- ♥ The who, what, where, when, why and how of Government Benefits, including SSI, SSDI, Medicaid and Medicare

10:20 - 10:30 a.m. - **Break**

10:30 a.m. - 12:15 p.m.

**Special Needs Estate & Future Planning, presented by Brian Rubin and Benjamin Rubin**

- ♥ The who, what, where, when, why and how of:

- ♦ PUNS;

- ♦ Special Needs Estate Planning including: types of and appropriate uses of Special Needs Trusts, Gifting by Grandparents and extended family members, the impact of divorce and child support on government benefits, determining the appropriate amount to leave;

- ♦ Children's Waiver for children under 18;

- ♦ Guardianships and Alternatives;

- ♦ Planning for when school years are over, when the bus stops coming and navigating the maze of Adult Services (Adult Waiver, In-Home, Residential, Supported Employment, Sheltered Employment, Developmental Training);

- ♦ The impact of the Ligas Class Action Law Suit and Affordable Care Act;

- ♦ The "ABLE" Account;

- ♦ Providing guidance, education and information for the "Future Team";

- ♦ The "sibling" perspective.

12:15 - 12:30 p.m. - **Questions and Answers**

# Planning for Children and Adults

## Locations

**Friday, September 20, 2019**

**9:00 a.m. –12:30 p.m.**

**8:30 a.m. Registration**

**Hosted by  
The Arc of the Quad Cities Area  
309-786-6474**

**Held at:  
Community Health Care, Rock Island Clinic  
2750 11th St.  
Rock Island, IL 61201**

**Thursday, October 10, 2019**

**9:00 a.m. –12:30 p.m.**

**8:30 a.m. Registration**

**Hosted by  
Glenkirk  
847-272-5111**

**Held at:  
1945 Techny Rd., Unit #7  
Northbrook, IL 60062**

**Friday, November 22, 2019**

**9:00 a.m. –12:30 p.m.**

**8:30 a.m. Registration**

**Hosted by  
Association for  
Individual Development  
630-966-4000**

**Held at:  
309 New Indian Trail Court  
Aurora, IL 60506**

**Wednesday, May 13, 2020**

**9:00 a.m. –12:30 p.m.**

**8:30 a.m. Registration**

**Hosted by  
Cornerstone Services  
815-741-7042**

**Held at:  
777B Joyce Rd.  
Training Center  
Joliet, IL 60436**

## About the Presenters

### **Brian Rubin, J.D.**

Attorney Brian Rubin, the founder of Rubin Law, A former IRS Agent and former IRS Attorney, has been a practicing attorney since 1976, has been married to his wife Linda for the past 42 years, is the parent of three children (40, 38, and 34), one of whom, Mitchell, has Autism. Brian's law practice, for nearly four decades, since 1982, when Mitchell was one year old, has been dedicated to serving the legal and future planning needs of his fellow Illinois families of children and adults with intellectual disabilities, developmental disabilities, and/or mental illness. Brian is the Immediate Past President (2017-2018) of the Special Needs Alliance, the national, non-profit, association of experienced special needs planning attorneys (membership is by invitation only), served on the Special Needs Law Section Steering Committee of the National Academy of Elder Law Attorneys, was a Charter Member of the Academy of Special Needs Planners, and is a Faculty Member and Text Book Author for the Illinois Institute for Continuing Legal Education (IICLE) on the topic of special needs legal and future planning, as well as a Speaker for the American Bar Association and the Illinois State Bar Association on those topics. Brian has been elected as a Fellow of the American College of Trust and Estate Counsel (ACTEC) and has received the highest attorney rating from Martindale-Hubbell, AV® Preeminent™, and AVVO's highest attorney rating of Top Attorney. Brian is a Past President of The Arc of Illinois (2007-2011), served on The Arc of Illinois Board for 15 years (2004-2019), is a Past Chairman of the State of Illinois Statewide Advisory Council on Developmental Disabilities (2002-2004), is the Immediate Past Chairman of the State of Illinois Autism Task Force (Chairman 2005-2015) established by the Illinois Legislature in 2005, serves as a member of the State of Illinois Guardianship & Advocacy Commission since 2013, served on the State of Illinois Department of Human Services Office of Inspector General Quality Care Board for 6 years, among many other State of Illinois Committees and Commissions. Brian has been a member of the Board of Directors of Clearbrook (an organization serving more than 8,000 individuals with intellectual and/or developmental disabilities, including his son, Mitchell) since 1989, is a member of the Board of Trustees of Life's Plan, Inc. which serves as Trustee of both Pooled Special Needs Trust and individual Special Needs Trusts, is a member (Past Chairman) of the Board of Directors of the Special Leisure Services Foundation, the foundation supporting the Northwest Suburban Special Recreation Association (NWSRA), served as the founding Chairman of the Board of Directors of the Foundation of The Special Education District of Lake County (SEDOL Foundation), served on the Board of Directors of KESHET (Jewish Parents of Children with Special Needs), serves on the Advisory Council of Encompass (Encompass in partnership with Jewish Child & Family Services, Jewish United Fund, JVS Chicago, JCC Chicago, Keshet, and The Center for Enriched Living and Center for Independent Futures), served for 7 years on the Board of Directors of Pact, Inc., now known as DayOne Pact, which serves as Trustee of Special Needs Trusts as well as Guardian for individuals with intellectual disabilities, developmental disabilities and/or mental illness, and served on the Board of Directors of Northpointe Resources, also an agency serving individuals with intellectual and/or developmental disabilities.

### **Sherri Schneider, QIDP**

For over thirty years, Sherri Schneider, President of Family Benefit Solutions, Inc., and the mother of a child with some special needs, has been tirelessly dedicated to helping individuals with special needs and their families. Her career began as a social worker in a CILA (Group Home), where she helped those with developmental disabilities and mental illnesses acquire the government benefits they so desperately needed, including SSI, Medicaid and food stamps. She also launched one of the first CLF facilities funded under a Medicaid waiver. As her career flourished, she supervised personnel in Illinois, Missouri and Nevada assist hospitalized patients apply for and obtain the government benefits for which they appeared eligible, with a strong emphasis on Social Security (Title 2), community and long-term care Medicaid. She now meets with families to thoroughly assess their situations and pursue appropriate benefit assistance programs by personally guiding them through the application process. Due to her vast experience, she has skillfully established and maintained open, productive relationships with government agencies involved in the entire decision making process. Sherri is a member of the Faculty of The Illinois Institute for Continuing Legal Education. She is also The Arc of Illinois Board President. Professionals and families find her seminars to be invaluable as they attempt to navigate the government benefit arena.

### **Benjamin Rubin, J.D., L.L.M**

Attorney Benjamin (Benji) Rubin, Brian's youngest son, Mitchell's "little/big" brother, has been a member of the Law Firm since 2010. Benji graduated from the University of Illinois College of Law, Magna Cum Laude, received his undergraduate degree from Northwestern University, and his Graduate Law Degree, an LLM (Tax), with honors, also from Northwestern University. Benji is a member of the Academy of Special Needs Planners, a member, by invitation, of the Special Needs Alliance (the national not for profit association of special needs planning attorneys with membership by invitation only), is Chairman of the American Bar Association Special Needs Planning Committee, serves as the President of SIBS (Supporting Illinois Brothers and Sisters), the Illinois chapter of the national Sibling Leadership Network, an organization of adult siblings of individuals with intellectual disabilities, developmental disabilities and/or mental illness. Benji is a member and officer (Treasurer) of the Board of Directors of The Arc of Illinois, is a member of the Clearbrook Associate Board, an organization serving more than 8,000 individuals with disabilities, including his brother, Mitchell, serves on the Board of Directors of DayOne PACT, which serves as Trustee of Special Needs Trusts as well as Guardian for individuals with intellectual disabilities, developmental disabilities and/or mental illness, serves on the Board of Directors of the Foundation of The Special Education District of Lake County (SEDOL Foundation), serves on the Advisory Council of Encompass (Encompass in partnership with Jewish Child & Family Services, Jewish United Fund, JVS Chicago, JCC Chicago, Keshet, and The Center for Enriched Living and Center for Independent Futures). Benji is also a Faculty Member for the Illinois Institute for Continuing Legal Education (IICLE) on the topic of special needs planning, as well as a Speaker for the American Bar Association and the Illinois State Bar Association on those topics. Having Mitchell as a brother profoundly shaped who Benji is today, and thus the type of law he chose to practice. His personal experiences as a sibling offer a unique perspective into the responsibilities that come with caring for a sibling with special needs. Now as an adult, those sometimes present and future responsibilities he has regarding his brother's care are a concern that he shares with all brothers and sisters of individuals with special needs.

## COST & REGISTRATION

Registration fees are as follows:

Family or Staff Member of Host Agency \$10.00

Parent/Family Member Other \$40.00  
Professional \$55.00

All members of The Arc of Illinois receive a 10% discount.

The registration fee covers the cost of materials. Please complete the attached registration form and return it along with the appropriate fee to:

**The Arc of Illinois**  
**20901 S. LaGrange Rd., Suite 209**  
**Frankfort, IL 60423**

Registrations may also be faxed to: 815-464-5292. The registration fee and form must be received before the event.

If financial restrictions prevent you from paying full registration, consumer stipends are available through The Arc of Illinois at 815-464-1832 or thearcofil.org. The Consumer Involvement Fund Program is funded by the Illinois Council on Developmental Disabilities.

### CANCELLATIONS AND REFUNDS

Participants canceling their registration at least 72 hours in advance will be entitled to a refund, less a \$25.00 administrative cost.

No refund or credit will be given for cancellations of less than 72 hours before the workshop or for notification of non-attendance after the workshop.

### ADDITIONAL INFORMATION

Please contact your local Arc if you will need respite care or transportation in order to attend the training. If you have any special needs or any questions, please contact Becca at The Arc of Illinois (815)464-1832. Notice of any special accommodations is required two weeks prior to the event.

#### Accommodations needed:

- \_\_\_ Accessible parking
- \_\_\_ Large print materials
- \_\_\_ Sign Language Interpreter
- \_\_\_ Braille materials
- \_\_\_ Other (please explain)

## REGISTRATION FORM

### Planning for Children and Adults

Name: \_\_\_\_\_

Agency: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_

Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

E-Mail: \_\_\_\_\_

I will attend:

Date	Location	
<input type="checkbox"/> September 20, 2019	Rock Island, IL	3353
<input type="checkbox"/> October 10, 2019	Northbrook, IL	3354
<input type="checkbox"/> November 22, 2019	Aurora, IL	3355
<input type="checkbox"/> May 13, 2020	Joliet, IL	3356

AMOUNT OF PAYMENT: \_\_\_\_\_

- Fax form and send check to The Arc of Illinois  
20901 S. LaGrange Rd., Suite 209  
Frankfort, IL 60423
- FAX (815-464-5292)
- Check enclosed payable to The Arc of Illinois
- P.O. or State Voucher #
- Charge to my Credit Card

Name as it appears on credit card:

\_\_\_\_\_

Credit Card #: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

Card holder's signature:

\_\_\_\_\_



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Suite 209  
Frankfort, IL 60423

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*The Arc of Illinois is  
committed to  
empowering persons  
with disabilities to achieve  
full participation in  
community life through  
informed choices.*

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**September 20, 2019**  
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**Joliet, IL**

### **Topics Include:**

- ♦ **Government benefits & programs in Illinois for children & adults with special needs... and how to navigate the “maze”**
- ♦ **Appropriate special needs estate planning, necessary to qualify for, and in order not to lose, government benefits**
- ♦ **Guardianship and alternatives**
- ♦ **Guidance on preparing instructions & thoughts for future care providers**

### **CEUs**

Nursing Home Administrators, Social Workers, Licensed Clinical Professional Counselors, Licensed Professional Counselors, Physical Therapists, Occupational Therapists and QIDPs are entitled to three CEU's. They will be required to sign in and out to receive their certificate.