

PLANNING FOR THE FUTURE

A webinar for Children and Adults with Intellectual and/or Developmental Disabilities

MAY 22, 2024

1:00 - 3:00 pm - “Special Needs Estate & Future Planning”

presented by Brian Rubin, JD & Benjamin Rubin, JD, LLM, Rubin Law

This session will cover the who, what, where, when, why and how of Government Benefits, including SSI, SSDI, Medicaid, and Medicare. Brian and Benji breakdown what’s needed with Future Planning for you and your family with topics including: types of and appropriate uses of Special Needs Trusts; necessary provisions in other estate planning documents, such as Wills, Lining Trusts and Powers of Attorney; Gifting by grandparents and extended family members; the impact of divorce and child support on government benefits; the impact of litigation settlements on government benefits; determining the appropriate amount to leave; ABLÉ Accounts pros and cons; Guardianship and the Alternatives including Supported Decision Making and Powers of Attorney; selecting and providing guidance, education, and information for the “Future Team”, the future Trustees, Guardians, Care Provides; among many other topics.

3:00 - 3:10 pm - Break

3:10 - 4:15 pm - “Planning for the future with PUNS and Home Based Services”

Presented by Shirley Perez and Ruth Aguilar, The Arc of Illinois Ligas Family Advocate Program

When planning for the needs of your child or adult with a disability, it is important to think carefully about their life goals as well as their ongoing health needs before putting a plan in place. Just like you and I, their needs change! Learn about some things that you should consider:

- PUNS
- Home Based Services

4:15 - 5:00 pm - TBD

About the Presenters

Ruth Aguilar, QIDP has over fifteen years of combined experience advocating for people with disabilities. She holds a B.S Psychology from the Illinois Institute of Technology and Professional Graduate Studies in Non-Profit from Harvard University. Ruth's professional experience stems from working previously in an ISC Agency and then as a Self-Directed Assistant serving the community with intellectual and developmental disabilities. Moreover, with her personal expertise as a mother of a teen girl with Rett Syndrome and Seizure Disorder, Ruth brings a wealth of knowledge to the families by assisting them in how to obtain services and understanding their options by being assertive, yet professional. Ruth is inspired by her husband and her daughter to be a servant leader who helps those around her without hesitation.

Shirley Perez is the Program Director of The Arc of Illinois Family Support Network and Ligas Family Advocate Program. Ms. Perez has spent many years advocating and working with individuals and their families with disabilities. She is a business graduate of Metropolitan Business College and Kaplan University. She operated her own business, worked at an ISC Agency where she advocated for and assisted families in locating services by navigating the State system. She has navigated the state system as both a professional and a parent, caring for an adult child with a developmental disability. In conjunction with the City of Chicago, Federal Home Loan Bank and The Illinois Housing Development Authority, she implemented a home-buying program for individuals with developmental and physical disabilities. She has worked as a Special Project Advocate with the Illinois Life Span Project; met with families/guardians to explain the transition process and listen to their concerns as their family members' transition into the community from State Operated Developmental Centers. She self-directs her daughter's long-term Medicaid waiver services, and has over 40 years of hands-on experience.

Brian Rubin, JD, the founder of Rubin Law, a former IRS Agent, and former IRS Attorney, has been a practicing attorney since 1976, is the parent of three children, one of whom, Mitchell, has Autism. Brian's law practice, 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 a Past President of the Special Needs Alliance, the national, non-profit, as-sociation 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 Textbook 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 Chairman of the State of Illinois Statewide Advisory Council on Developmental Disabilities, is a Past Chairman of the State of Illinois Autism Task Force (established by the Illinois Legislature), served as a member of the State of Illinois Guardianship & Advocacy Commission, and served on the State of Illinois Department of Human Services Office of Inspector General Quality Care Board, among other State of Illinois Committees and Commissions. Brian is a Past President of The Arc of Illinois (served on The Arc of Illinois Board for 15 years), 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. Brian has also served on the Board of Directors of Pact, Inc. (now known as DayOne Pact, Inc) which serves as Trustee of Special Needs Trusts as well as Guardian for individuals with intellectual disabilities, developmental disabilities and/or mental illness, he served as 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 Trustees 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), served 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), and served on the Board of Directors of Northpointe Re-sources, also an agency serving individuals with intellectual and/or developmental disabilities.

Benjamin Rubin, JD, LL.M., is President of Rubin Law, a Professional Corporation, a firm established by his father, Brian N. Rubin. Benji joined the law firm in 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 LL.M. (Tax), with honors, also from Northwestern University. Benji is a member of the Board of Directors of the Special Needs Alliance, the national, non-profit, association of experienced special needs planning attorneys (membership is by invitation only), is Vice-Chair of the American Bar Association Elder Law and Special Needs Planning Group, a past Chair of the American Bar Association Special Needs Planning Committee, a Past 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, and served as a member of the Board of Directors of The Arc of Illinois for 9 years. He also serves on the Board of Directors NSSRA (Northern Suburban Special Recreation Association) which facilitates and provides year-round recreation programs and services to individuals in Deerfield, Glencoe, Glenview, Highland Park, Kenilworth, Lake Bluff, Northbrook, Northfield, Wilmette, and Winnetka; Highwood and Lake Forest, and Riverwoods. In addition, Benji 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), served previously 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 has presented on special needs legal planning for the Illinois Institute for Continuing Legal Education (IICLE), the American Bar Association, the Illinois State Bar Association, and the National Academy of Elder Law Attorneys (NAELA).

COST & REGISTRATION

**May 22, 2024
1:00 to 5:00 p.m.**

**This Conference will be held VIRTUALLY using
Zoom Webinar.**

Registration Fees for Participants are:

Consumer/Family Member.....\$ 40.00
Professional.....\$ 55.00

Please complete the attached registration form
and return it along with the appropriate fee to:

**The Arc of Illinois
9980 190th Street, Suite C
Mokena, IL 60448
815-464-1832**

or you can register online at
www.thearcofil.org

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.

**This is a Virtual Event using Zoom. You will be
emailed a link before the event!**

CEUs

Nursing Home Administrators, Social Workers,
Licensed Clinical Professional Counselors, Licensed
Professional Counselors, Physical Therapists,
Occupational Therapists and QIDPs are entitled to 4
CEUs. They will be required to log in individually to
receive their certificate.

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.

REGISTRATION FORM

Planning for the Future Seminar

May 22, 2024

One form per person, please print legibly.

Name: _____

Job Title: _____

Agency: _____

Address: _____

City: _____

State: _____ **Zip:** _____

Phone: _____

E-mail: _____

AMOUNT PAID: _____

METHOD OF PAYMENT:

_____ Fax form to 815-464-5292 and send check to
The Arc of Illinois

_____ Check enclosed payable to The Arc of Illinois

_____ P.O. or State Voucher # _____

_____ Charge to my Visa, Mastercard, Discover or
American Express

Name as it appears on credit card:

Credit Card Number:

Expiration Date: _____ **CVV Code:** _____

Billing Zip Code: _____

Card holder's signature:

**Notice of any special accommodations is
required two weeks prior to the event.
Contact The Arc of Illinois at 815-464-1832.**