

**STATE BAR OF MICHIGAN  
ELDRS SECTION ANNUAL REPORT**

**Bar Year:** 2014-2015

**Section Name:** Elder Law and Disability Rights Section

**Mission Statement:** The Elder Law and Disability Rights Section of the State Bar of Michigan provides education, information and analysis about issues of concern through monthly meetings, annual seminars, this site, public service programs, and publication of a newsletter.

**Officers and Council Members:**

| <u>Officer</u> | <u>Name</u>         | <u>Address</u>                | <u>Telephone</u> | <u>Email</u>   |
|----------------|---------------------|-------------------------------|------------------|--|
| Chair          | Patrick J. Bond     | St. Clair Shores,<br>Michigan | 586-447-<br>3717 | <a href="mailto:pbond@bondelderlaw.com">pbond@bondelderlaw.com</a> |
| Chair-Elect    | John B. Payne       | Dearborn, Michigan            | 313-563-<br>4900 | jpayne@law-business.com  |
| Secretary      | Michele P. Fuller   | Shelby Township,<br>Michigan  | 586-803-<br>8500 | michele@michiganlawcenter.com                                      |
| Treasurer      | Sara Ann<br>Schimke | Southfield, Michigan          | 248-381-<br>3000 | sschimke@jaffelaw.com  |

| <u>Member</u>       | <u>Term</u> | <u>Member</u> | <u>Term</u> |
|---------------------|-------------|---------------|-------------|
| <b>See Attached</b> |             |               |             |
|                     |             |               |             |

**Council Meeting Schedule:**

Please attach any additional information needed regarding Council meetings as an addendum.

| <u>Meeting Type</u> | <u>Date</u> | <u>Location</u> |
|---------------------|-------------|-----------------|
| <b>See Attached</b> |             |                 |
|                     |             |                 |

**General Budget Information:**

The fund balance for the section at the end of April 2014 was \$82,647.98. Receipts are comprised of approximately \$35,000 in dues. With most of the balance consisting of receipts relating to our two yearly conferences.

Our annual expenditures have remained relatively consistent over the past few years. Our section has previously authorized significant expenditures for litigation beneficial to seniors and those with disabilities. But expenditures from the Fall and Spring Conferences make up about sixty-percent of the yearly expenses. Dues remain consistent at \$35/year.

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**Events and/or Seminars:**

| <u>Event or Seminar Title</u> | <u>Date</u>                 | <u>Location</u>                                |
|-------------------------------|-----------------------------|--|
| 2014 Spring Conference        | March 14, 2014              | The Inn at St. Johns<br>Plymouth, Michigan     |
| 2014 Fall Conference          | October 1-3, 2014           | Mission Point<br>Mackinac Island, Michigan     |
| 2015 Spring Conference        | March 6, 2015               | The Inn at St. Johns<br>Plymouth, Michigan     |
| 2015 Fall Conference          | September 30 – Oct. 2, 2015 | Boyne Mountain Resort<br>Boyne Falls, Michigan |

**Legislative issues:**

We have had a busy year addressing legislative issues. We have taken positions on a number of different pieces of legislation and other various policy concerns, including: (a) Special-Needs Trust Fairness Act; (b) Fiduciary Access to Digital Assets Act; (c) Achieving a Better Life Experience Act (ABLE Act); (d) property-tax uncapping legislation; (e) SBO-Trust policy matters; (f) pooled-trust concerns; (g) various litigation matters regarding medicaid policy (i.e., SBO-Trust concerns, Estate Recovery Hardship-Exemption concerns; and, (h) unauthorized practice of law concerns.

**Recommendations for next Council:**

Continue a strong tradition of excellent interdisciplinary conferences to provide education and support for those who serve seniors and persons with disabilities.

**Reports must be submitted before May 31, 2015 to:**

Jennifer Williams  
Administrative Assistant  
306 Townsend Street, Lansing MI 48933  
Email: [jwilliams@mail.michbar.org](mailto:jwilliams@mail.michbar.org)  
Phone 517-367-6421 Fax: 517-482-6248

**ELDER & DISABILITY RIGHTS SECTION  
OF THE  
STATE BAR OF MICHIGAN**

5/31/2015

MEETING SCHEDULE  
(YEAR 2014-2015)

| Meeting No.: | Date:              | Time:    | Venue:  |
|--------------|--------------------|----------|---|
| 1            | November 1, 2014   | 10:00 AM | State Bar of Michigan<br>306 Townsend Street<br>Lansing, Michigan 48933<br>800-968-1442   |
| 2            | December 6, 2014   | 10:00 AM | Bassett & Associates PLLC<br>2045 Hogback Road<br>Ann Arbor, Michigan 48108<br>734-930-9200   |
| 3            | February 7, 2015   | 10:00 AM | BOND Estate Planning & Elder Law PC<br>400 Maple Park Avenue, Suite 402<br>St. Clair Shores, Michigan 48081<br>586-447-3717   |
| 4            | March 7, 2015      | 10:00 AM | BOND Estate Planning & Elder Law PC<br>400 Maple Park Avenue, Suite 402<br>St. Clair Shores, Michigan 48081<br>586-447-3717   |
| 5            | April 4, 2015      | 10:00 AM | BOND Estate Planning & Elder Law PC<br>400 Maple Park Avenue, Suite 402<br>St. Clair Shores, Michigan 48081<br>586-447-3717   |
| 6            | May 2, 2015        | 10:00 AM | Caroline Dellenbusch PLC<br>2944 Fuller Avenue NE, Suite 100<br>Grand Rapids, Michigan 49505<br>616-451-4242  |
| 7            | June 6, 2015       | 10:00 AM | BOND Estate Planning & Elder Law PC<br>400 Maple Park Avenue, Suite 402<br>St. Clair Shores, Michigan 48081<br>586-447-3717   |
| 8            | August 1, 2015     | 10:00 AM | Somewhere in the Upper Peninsula<br>- Assimilate with the culture and dialect of this<br>unique and native land.<br><a href="http://en.wikipedia.org/wiki/Yooper_dialect">http://en.wikipedia.org/wiki/Yooper_dialect</a> |
| 9            | September 12, 2015 | 10:00 AM | Caroline Dellenbusch PLC<br>2944 Fuller Avenue NE, Suite 100<br>Grand Rapids, Michigan 49505<br>616-451-4242  |
| 10           | October            | 7:30 AM  | TO BE DETERMINED  |

ELDER LAW DISABILITY RIGHTS SECTION

ANNUAL REPORT  
(2014-2015)

|    | Council Members |          |                         | Term Expires: | Term No.: |
|----|-----------------|----------|-------------------------|---------------|-----------|
| 1  | Jane            | A.       | <b>Bassett</b>          | 2015          | 1         |
| 2  | Patrick         | J.       | <b>Bond</b>             | Chair         | n/a       |
| 3  | Rosemary        | H.       | <b>Buhl</b>             | Ex-Chair      | n/a       |
| 4  | Christine       |          | <b>Caswell</b>          | 2015          | 1         |
| 5  | Howard          | H.       | <b>Collens</b>          | 2015*         | 1         |
| 6  | Michele         | P.       | <b>Fuller</b>           | Secretary     | n/a       |
| 7  | Cynthia         | Jill     | <b>Goodell</b>          | 2016          | 1         |
| 8  | Angela          | M.       | <b>Hentkowski</b>       | 2016          | 1         |
| 9  | J.              | David    | <b>Kerr</b>             | 2016          | 1         |
| 10 | Robert          | D.       | <b>Mannor</b>           | 2016          | 1         |
| 11 | Maria           | R.       | <b>Messina</b>          | 2016          | 1         |
| 12 | Michael         | A.       | <b>Mestelle</b>         | 2017          | 2         |
| 13 | John            | B.       | <b>Payne</b>            | Chair-Elect   | n/a       |
| 14 | Kelly           | McNerney | <b>Quardokus</b>        | 2017          | 2         |
| 15 | David           | D.       | <b>Sprague</b>          | 2017          | 1         |
| 16 | Sara            | Ann      | <b>Schimke</b>          | Treasurer     | n/a       |
| 17 | Christopher     | William  | <b>Smith</b>            | 2017          | 2         |
| 18 | James           | B.       | <b>Steward</b>          | 2017          | 2         |
| 19 | Beth            | A.       | <b>Swagman</b>          | 2017          | 2         |
| 20 | Erma            | S.       | <b>Yarbrough-Thomas</b> | 2015          | 1         |

\* Took the place of resigning council member William David Lucius