TIMED AGENDA

:00	Introduction
:05	Why Should I Care? • Government looking for new funding sources • 10 attorneys who paid the price • The ethical binds in which these attorneys have been squeezed
:20	How Did We Get Here? • A brief history of creation of Medicare • A look at how the language and requirements have changed over the years
:40	Now What? • Medicare and defendants are aiming at you • The regulatory landmines that can blow up your practice • The ethical landmines
:55	• The ethical pitfalls and the Model Rules
1:10	How Do I Protect Myself and My Client? • Use an expert to avoid the landmines and ethical pitfalls • Look for key attributes in experts
1:25	Conclusion
1:30	Question and Answer Session (up to 30 additional minutes available)
Total Minutes: 90 minutes	

EDUCATIONAL MATERIALS

Total Pages: 234

Handout, "How Medicare Can Haunt Trial Lawyers . . . Even Decades into the Future." pp 4

Medicare Documents and Notices

- Conditional Payment Notice, pp 16
- Medicare Summary Notice, pp 2
- Humana Medicare Summary Notice, pp 2
- Medicare Secondary Payer Booklet, pp 15
- Stalcup Memo, pp 3

Presentation, "How Medicare Can Haunt Trial Lawyers . . . Even Decades into the Future." pp 177

Presentation, "Rising Standard of Care for Attorneys." pp 15

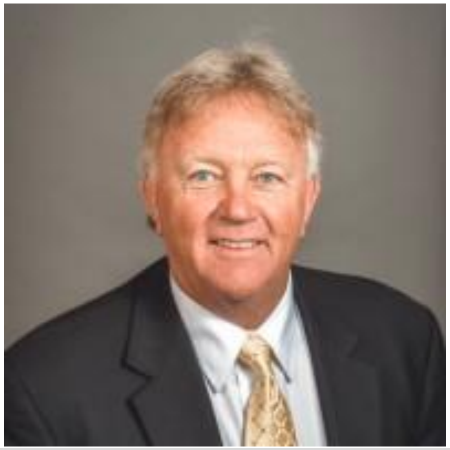
COURSE NO. 200301W00

DESCRIPTION

With government budgets tightening, many agencies are looking for new revenue sources. Medicare has found one: Trial Lawyers. In this 90 minute presentation, Jack Meligan, Trisha Thompson, and Jeremy Babener will review the ethical landmines which Medicare's new tactics place before trial lawyers and teach you how to deactivate them. This information is vital for all plaintiff's attorneys—or you might just wind up another example in this program.

PRESENTERS

JACK MELIGAN, RSP, BCFE, MSCC, CMSP-F



- Founder and Chairman of the Board, Settlement Professionals Inc.
- Owner, The Plaintiff's MSA and Lien Solution, LLC
- Founder, Settlement Capital Advisors, LLC
- Owner, SPI Holdings, Inc.
- Certified Medicare Secondary Payer Fellow (CMSP-F)
- Medicare Set-Aside Certified Consultant (MSCC)
- Board Certified Forensic Examiner (BCFE)
- Registered Settlement Planner (RSP)

Jack Meligan is the founder and president of Settlement Professionals, Inc., a national plaintiff-only settlement planning firm. He is also the founder and managing member of Settlement Capital Advisors, LLC, a nationwide registered investment advisory firm, and The Plaintiff's MSA & Lien Solution, LLC, a national plaintiff-only Medicare and MSP compliance and lien resolution service firm.

In addition, Jack is the founding president of the Society of Settlement Planners. The Society of Settlement Planners is an association of settlement planners, structured settlement specialists, and special needs settlement-planning attorneys nationwide. Above all, they advocate for settlement planning to uncover and plan for the needs of injury victims and their families.

Settlement planning incorporates a wide variety of income replacement strategies with wholistic financial planning and extensive trust planning. Including, but not limited to: Special Needs Trusts, Qualified Settlement Funds, Medicare Set-Asides, and Settlement Preservation Trusts.

Since 2003, Jack has been a pioneer in designing and implementing solutions for the tax dilemma that plaintiffs encounter when settling substantial taxable damage tort cases.

Jack lives in Milwaukie, Oregon with his wife, Kathleen. They have two grown daughters and two grandchildren.

WEBSITES

https://www.plaintiffsmsa.com/

http://www.settlepro.com/

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JEREMY BABENER

- Special Tax Counsel, Lane Powell PC
- Former Vice President & General Counsel, Multistream Capital
- Board Member, Society of Settlement Planners
- Former Board Member, Oregon State Bar Tax Section Executive Committee
- LL.M., Taxation, New York University School of Law, 2011
- J.D., New York University School of Law, 2010
- B.A., Political Science with high honors, Haverford College, including year abroad at the University of Oxford, 2007

Admissions: Oregon, US District Court for the District of Oregon, and US Tax Court

Jeremy Babener is a nationally recognized tax attorney who focuses his practice on lawsuit awards, settlements and complex structures.

As Special Tax Counsel Jeremy advises on tax and business matters in addition to his work outside the firm. He previously served full time in Lane Powell's Tax Group and later as general counsel and vice-president to firm client Multistream Capital, a financial company selling customized income stream investments.

Jeremy regularly speaks and writes on tax issues relating to settlements and structures and serves as a Board Member and Chair of the Legal Committee of the Society of Settlement Planners.

Before joining Lane Powell, Jeremy served as a Tax Policy Fellow in the U.S. Treasury Department's Office of Tax Policy, focusing on partnership tax issues including non-compensatory partnership options and debt-equity exchanges.

WEBSITES

https://www.lanepowell.com/Our-People/Jeremy-Babener

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TRISHA THOMPSON

- Associate, Holland and Knight
- J.D., University of Oregon School of Law
  - Editor in Chief, *Oregon Law Review*
- B.A., University of Minnesota

Admissions: Oregon, US District Court for the District of Oregon

Trisha Thompson is a litigation attorney in Holland & Knight's Portland office, where her practice focuses on ethics and risk management for law firms and lawyers, as well as commercial and employment litigation.

Ms. Thompson represents lawyers and law firms in a variety of contexts, from organizational issues (such as formation, operations, dissolution and lateral lawyer moves), to state bar disciplinary defense. She also advises lawyers, law firms and law-related services on regulatory issues, such as unauthorized practice of law, litigation financing, fee splitting, conflicts of interest, confidentiality and evidentiary privilege issues.

As a litigator, Ms. Thompson's practice includes representing clients in employment matters, and real estate and complex business disputes. She also assists clients with the creation of policies and procedures that will prevent litigation.

Prior to joining Holland & Knight, Ms. Thompson worked as the supervisor of a research team at a national healthcare-focused nonprofit organization. During law school, she externed for the Honorable Michael J. McShane in the U.S. District Court for the District of Oregon and clerked for the Oregon Department of Justice's Labor and Employment Section.

WEBSITES

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