THE Elderlaw FIRM
Protecting What Matters Most

Supercharge Your Business and Earn 4 Credits!

May 8, 2026

8:00 am	Registration and Breakfast
8:30 am	Dennis Toman, JD, CELA
9:30 am	Dennis Toman, JD, CELA
10:20 am	Power Boost
10:30 am	Mike Casterlow, JD
11:30 am	Panel of Attorneys
12:30 pm	Lunch & Networking

Greensboro Country Club
410 Sunset Drive
Greensboro NC 27408

CREDIT INFORMATION:
This course is designed to be eligible for continuing education credits for a variety of professions, including CPAs/accountants, financial planners, and insurance professionals. Upon attending the full course, you will receive a certificate of completion. We will report attendance as required.

CPAs, CFPs & Insurance:
This course is eligible for continuing professional education, and attendees will receive NASBA CPE (4) in the field of study: Taxes

LIFE AND HEALTH INSURANCE AGENTS:
This course has been approved by the Department of Insurance for the granting of continuing education credits, and attendees will receive CPE (4).

ATTORNEYS:
This course is eligible for continuing legal education, and attendees will receive CLE (4).

Credits provided by the Financial Service Advisors Council

REGISTRATION:

Space is Limited.
Scan the QR Code and fill out the form to reserve your spot.

Approved by:

NATIONAL REGISTRY OF CPE SPONSORS

Estate & Long-Term Care Planning, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be sumitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

FINANCIAL SERVICE ADVISORS COUNCIL

Financial Service Advisors Council is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

Estate and Elder Law Planning
Boot Camp
for Advisors

4 HOURS CE CREDIT

Boot Camp 2026

4 CE Credits Offered
Friday, May 8, 2026 | 8:00 AM - 1:30 PM
Breakfast & Lunch Provided
$150
Greensboro Country Club | Greensboro

Hosted and Presented By

THE Elderlaw FIRM
Protecting What Matters Most

403 W. Fisher Ave. | Greensboro, NC 27401 | 336-378-1122
www.ElderlawFirm.com

Supercharge Your Business and Earn 4 Credits!

Dear Financial Professional,

Join our **Boot Camp** to gain practical insights into **Elder Law, Estate Planning, and Asset Protection** strategies that help you better serve clients and grow your business. With nearly 10,000 Americans turning 65 every day, now is the time to integrate these planning tools into your practice—and we'll show you how.

This program offers **continuing education credits** for CPAs, accountants, financial planners, and insurance professionals, along with valuable networking opportunities. Each attendee will receive a **certificate of completion.**

Designed for all experience levels, this course provides a working understanding of estate planning fundamentals. You'll learn to identify key issues affecting your clients, minimize tax exposure, and reduce risk. While you won't leave as an estate planning expert, you will gain the knowledge to spot critical concerns and connect clients with the right solutions—while creating **new revenue opportunities.**

Sincerely,

The Elderlaw Firm Team

Dennis J. Toman, CELA | President, CEO, The Elderlaw Firm
Dennis is a nationally recognized elder law attorney, author, and speaker, and the founder of The Elderlaw Firm. A Certified Elder Law Attorney, he is a past chair of the NC Elder Law Section and has been active with The Financial Service Advisors Council. Guided by his mission to protect local families and help them be better prepared for the second half of life, Dennis provides trusted legal guidance with clarity and compassion.

Mike Casterlow, JD, | Estate Planning Attorney
Mike Casterlow is a respected leader in senior care and community advocacy, known for his commitment to improving the lives of older adults across North Carolina. He serves on the board of Carolina Aging Alliance and Guidance Carolina. His insights and dedication make him an effective and compassionate advocate for his clients.

Laura Sloane, JD | Estate Administration Attorney
After spending seven years working in business law and assisting her husband with multiple businesses. Laura joined The Elderlaw Firm with a desire to help families navigate the complexities of estate planning. She is known for her thoughtful approach and deep compassion, committed to empowering clients with the knowledge and tools they need to face the second half of life with confidence and peace of mind.

4 CE CREDITS Only $150

COURSE AGENDA

For CFP® holders, CPAs, Attorneys, & Life and Health Insurance Licensees. The entire course is worth 4 CE hours.

8:00 am **REGISTRATION, FULL BREAKFAST**

8:20 am **INTRODUCTIONS**

8:30 am **FOUNDATIONAL ESTATE PLANNING**
Foundational estate planning documents and uses including wills, powers of attorney, and advance directives: ***Dennis Toman, JD, CELA***

- Wills vs. Intestacy
  - Types of Trusts
- Powers of Attorney
  - Validity
  - Third-party Liability
  - Compensation
  - Out-of-State POAs
- Advance Directives
  - Definitions
  - Health Care Proxy
  - Emergency Situation with Healthcare Proxy
- MOST and other Forms
  - Living Will
  - HIPAA Release

9:20 am **BREAK, NETWORKING**

9:30 am **ESTATE PLANNING TO ADDRESS ELDER LAW ISSUES**
Estate planning issues that affect seniors as they relate to asset preservation and protection, tax planning, and trust planning: ***Dennis Toman, JD, CELA***

- Estate Planning
  - Goals of Estate Planning
  - Uses of Trusts
- Probate
  - Supplemental Needs
  - Probate Avoidance
  - Tax Planning Issues
- Financial Planning
  - Investments
  - Long-term Care Insurance
  - Life Insurance
  - Prepaid Funeral Contracts

10:20 am **BREAK, NETWORKING**

10:30 am **DEATH OF A LOVED ONE**
Issues surrounding the passing of a loved one as it relates to estate administration, including probate, trust administration, and taxes: ***Mike Casterlow, JD***

- Estate Assets
  - Categories
  - Valuation
  - How Assets are Titled
- Testate vs. Intestate
- Probate Administration
- Trust Administration
- Tax Considerations

11:20 am **BREAK, NETWORKING**

11:30 am **PANEL DISCUSSION**
Medicaid for long-term care expenses, eligibility requirements, and rules regarding asset transfers: ***The Elderlaw Firm Attorneys***

- What's the most common misconception advisors have about Medicaid eligibility?
- How do spousal allowances work, and what planning strategies can help couples?
- What role do Medicaid-compliant annuities play in asset protection?
- How does Medicaid estate recovery impact planning for clients with significant home equity?
- What's one proactive step advisors can take to help clients avoid costly mistakes?

12:30 pm **WRAP-UP AND EVALUATIONS**

12: 30 pm **LUNCH & NETWORKING**

Space is Limited.
Scan the QR Code and fill out the form to reserve your spot.