



# Elder Law Notes

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Fall 2010

## Elder Law Section Meetings

The Fall 2010 Section meeting will be held from **11:30 until 4:00 p.m. on Friday, November 5, 2010 in Mobile**. Not only has the estate planning firm of **Ryan, Hicks, Cumpton & Cumpton** graciously offered to host our meeting in their new building at **3523 Montlimar Plaza Drive**, they are providing speakers and planning a cocktail hour to end the day. Following a seafood luncheon and discussion of section business the following CLEs will be presented: **Tom Ryan** will discuss the *Status of the Federal Estate Tax*, **Gary Hicks** will discuss the *Top Ten Mistakes in Estate Planning*, and **Michael Cumpton** will address *Irrevocable Trusts and VA Aid & Attendance Benefits*. Please **RSVP** to [jmckelvin@shelbyroden.com](mailto:jmckelvin@shelbyroden.com) by **November 1**.

At the Summer 2010 meeting at Jones Law School in Montgomery, new officers were selected. Clayton Davis opened the meeting and thanked the outgoing officers for their hard work on behalf of the section during the past year. Nominations for the 2010-2011 slate of officers and Executive Board were taken and voted on.

Melanie Bradford was elected Chair after serving the Section years in other capacities. Alan Zeigler has taken on the job of Co-Chair. After serving for multiple years as secretary of the Section, Jennifer Griffin has joined the Executive Board. Her job as secretary was assumed by Jodi McKelvin. Finally, John Craft has been installed as the new treasurer.

Congratulations to the new officers and Executive Board members.

## REFLECTIONS ON THE DIRECTION OF THE SECTION FOR 2010-2011 FROM MELANIE BRADFORD, CHAIR

It is a privilege to serve as chair for the Alabama Elder Law Section for the 2010-2011 term. I strongly believe this section is a valuable asset to its members. I have always found the members to be sincerely friendly and willing to share their knowledge with others. Certainly, many members were willing to help me as a new lawyer and they are still there to help me when I run into a problem. This willingness to help one another is, in my opinion, something in which the section should take great pride.

Historically, the section offers free CLE to members several times each year. The meetings are usually held in Birmingham, Huntsville, Montgomery, and Mobile. This tradition will continue in the 2010-2011 term. We are working on determining the topics for future CLEs at this time. I am hopeful that we will have a CLE presented by a Medicaid ALJ that will (again, hopefully) answer many questions that we have about the fair hearing process and appeals. Other topics under consideration are: utility of reverse mortgages; Medicaid qualification; VA benefits; the use of personal service agreements; probate litigation; and the nuts and bolts of an Elder Law practice. Please let me know if there is a topic you would like to hear about at an upcoming meeting.

I am looking forward to seeing you all at the Fall Section Meeting on Friday, November 5<sup>th</sup> in Mobile, which will be hosted by Ryan, Hicks, Cumpton & Cumpton.

I hope to see you there.

Melanie

### ELS Officers 2010-2011


Chair - Melanie Bradford  
Co-Chair - Alan Zeigler  
Secretary - Jodi McKelvin  
Treasurer - John Craft

### Executive Board 2010-2011

Clayton Davis  
Ron Holtsford  
Jennifer Griffin  
Doug Vogel

## USEFUL TECHNOLOGY TOOLS

I don't consider myself a techie by any means, but I am aware that only a small percentage of the attorneys I know are taking advantage of the tools available to gather information from the internet in simple and efficient ways.

**Do you read any blogs** (web logs)? One of Google's many free services, Google Reader, can gather posts to blogs you find interesting in one easy to access place. There are blogs on every topic under the sun and bloggers can point you to up-to-date information on a topic without you having to waste time trolling the internet to find it on your own. For example, <http://blog.elderlawanswers.com>, posts every week or so and focuses on elder law issues. You can click the RSS feed button (it looks like this ) for a free subscription to the blog and the posts will be delivered directly to your Google Reader page. Sign up for a few of these and you've created your own legal newsletter that is constantly updated with useful content without further effort from you. A few to try: lawyerist.com, buildasolopractice@spu, legalproductivity@rocketmatter.com. Google these titles and subscribe.

**Do you have a Twitter account?** Even if you don't want to do any "tweeting" yourself, you can gather a wealth of information from people who love to tweet. Signing up for an account is simple and free. You just need a name, email address and password. My twitter account is @jodimckelvin and I have signed up to follow a mix of attorneys, companies, political pundits and friends who tweet links to interesting information on elder law, practice management, technology, politics – you name it. I also tweet links to interesting info on elder law topics, whether from the *Wall Street Journal*, bloggers or other Twitter users. A few to try: @elderlawguy, @trialandheirs, @lawpractice, @lexisnexis, @bamasports and @auburnbuzztap.

**Do you have an iPod or iPhone?** Lots of people have an iTunes account and download songs to an iPod or iPhone; however, you may not be aware of the wealth of information that you can download for free from iTunes. There are numerous podcasts (audio and video files) that you can download to your device. Podcasts and iTunes University cover almost every imaginable topic. Even CMS has a podcast (Medicare & You 2010), but it is pretty dry! A few to try: the LawBiz Podcast, Lawyer2Lawyer, This American Life, How Stuff Works, and Tech Stuff.

Jodi K. McKelvin  
Shelby Roden LLC  
2956 Rhodes Circle  
Birmingham, AL 35205  
205.933.8383  
[jmckelvin@shelbyroden.com](mailto:jmckelvin@shelbyroden.com)  
@jodimckelvin

## **PRO BONO WEEK CLINICS AND FREE CLE OCTOBER 25<sup>th</sup>, 26<sup>th</sup> and 28<sup>th</sup>**

The Birmingham Bar Association and the Alabama State Bar are coordinating events for Pro Bono Week (October 25 – 29). In Birmingham, two senior legal clinics are planned from **9:00 - 1:00 pm** on **October 25<sup>th</sup> and 26<sup>th</sup>**. Attorneys can sign up for two hour shifts or stay for the entire day. A free online CLE will be provided to those who volunteer. It would be wonderful if our Birmingham section members could fill the majority of these slots!

There is also a General Law Clinic (divorce, family law and misdemeanor criminal) on **October 28<sup>th</sup> from 9:00 – 4:00 p.m.** Volunteers will likely see two to three clients. A free 3.5 hour CLE will be provided to volunteers on October 21 from 1:00 – 4:30 pm at the Cumberland School of Law.

Please contact Jodi McKelvin if you have questions or would like to volunteer for a shift.

[jmckelvin@shelbyroden.com](mailto:jmckelvin@shelbyroden.com)

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Hugh M. Lee and Jo Alison Taylor's **Alabama Elder Law** has been updated for 2010 and is available through West Publishing.

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The ABA Commission on Law and Aging will be conducting free webinars on Veterans and VA Benefits:

**October 27, 2010 – 1 – 2:30 p.m.**  
*Understanding Discharge Review:  
helping a Veteran with a "Bad"  
Discharge.*

**November 17, 2010 – 2 – 3:30 p.m.**  
*Establishing Service Connection on  
VA Benefit Claims*

Check [www.abanet.org/aging](http://www.abanet.org/aging) for program and registration information.

**ALABAMA STATE BAR  
ELDER LAW SECTION  
Membership List as of  
October 1, 2010.**

Elizabeth	Williams	Abel
Mark	David	Andrade
Katherine	Nowell	Barr
Chester	Park	Barton
Steven	Kay	Brackin
Melanie	Bean	Bradford
Gaines	Bennett	Brake
Daniel	Jason	Britt
Isaac	Ripon	Britton
Richard	James	Brockman
Mary	Lynn	Campisi
Thomas	Neely	Carruthers
Mary	Beth Wear	Cavert
David	Wayne	Childress
John	Sydney	Cook
Rebecca	Lyn	Copeland
Robert	Douglas	Cornelius
John	Charles	Craft
Laura	Johnson	Crissey
Gerald	Allen	Daniel
Larry	Eugene	Darby
Carolyn	Madeja	Dohn
Chriss	Hershell	Doss
Sharon	Kay	Doviet
Christie	Lyman	Dowling
Charles	Burton	Dunn
Charles	Homer	Durham
Russell	Ray	Enfinger
Christopher	Belk	Estes
Monica	Nelson	Fischer
Patricia	Ann	Frederick
Broox	Gray	Garrett
Van	Coleman	Gholston
Laura		
DeAnna	Chaney	Givens
Connie	Lynn	Glass
Jonathan	David	Green
Laura	Kate	Gregory
John	Clinton	Harris
Sanford	Dewey	Hatton

John	Frank	Head
John	Robert	Holliman
John	Neal	Holt
Ronald	Alex	Holtsford
Jonathan	David	Hood
Kearney	Dee	Hutsler
Mary	Annette	Irons-Parker
Sherry	Lynn	Johnson
Sarah	Scogin	Johnston
Vivian	Gaines	Johnston
Camden	Joseph	Kent
Timothy	Brown	Loggins
John	Russell	Martin
Timothy	Benson	McCool
William	Fray	McCormick
William	Travis	McGowin
Jodi	Lynn	McKelvin
Richardson	Bricken	McKenzie
Thomas	Alex	McLeod
Joel	Arthur	Mendler
Betty	Spidell	Middlebrooks
Brian	Wesley	Moore
Carolynn	Hinkle	Moore
Eugene	Terry	Moore
Anne	Reilly	Moses
Thomas	Alexander	Nettles
William	Grady	Nolan
Mary	Jane	Oakley
Arnold	Stewart	O'Bannon
Jason	Edwin	Patrick
Rebecca	Emily	Patty
JoAnn	Marie	Perez
Susan	Michelle	Perry
Wendy	Atkins	Pierce
Rachel	Harris	Pinson
Nancy		
Catherine	Smith	Pitman
Jean	Marguerite	Powers
Harold	Douglas	Redd
James	Christopher	Reilly
Audrey	Lee	Roberts
Michael	Finley	Robertson
Julia	Smeds	Roth
William	Morgan	Russell
Robert	Earl	Sasser
Harry	Vincent	Satterwhite
Philip	Dale	Segrest

Tammy	Kay	Shamsie-McCabe
Judy	Bateman	Shepura
Troy	Alan	Skipworth
Mark	Edward	Smith
Larry	Dewayne	Sneed
Thomas	Jeffers	Stein
Sidney	Carlyle	Summey
Pamela	Pelekis	Swan
Scott	Randall	Talkington
William	Blanton	Tatum
Jo	Alison	Taylor
Steven	Allen	Thomas
Carrie	Ann	Townes
Ahrian	Davis	Tyler
Douglas	Mark	Vogel
William	Waldrum	Walker
Teresa	Belrose	Watson
Richard	Gregory	Watts
John	Francis	Whitaker
Kitty	Hope	Whitehurst
Gary	Stephen	Wiggins
James	Bruce	Wiley
Elizabeth	Ingalls	Winter
James	Jerry	Wood
Steven	Mark	Wyatt
Bloise	Alan	Zeigler

If your name is not included, please check to make sure you have paid your section dues to the Alabama State Bar.

**Please pay your \$25 dues to:  
Alabama State Bar  
Attn: Sections c/o Rita Gray  
P.O. Box 671  
Montgomery, AL 36101-0671**