



# The 11<sup>th</sup> Biennial National PLAN Alliance Conference



National  
PLAN Alliance

*Sharing Best Practices to Better Serve the Future Planning Needs of the  
Disability Community*

*Presented by BOK Financial, True Link & Webster Private Bank*

Renaissance Boston Patriot Place Hotel

June 20- 22, 2018

Renaissance Boston Patriot Place Hotel

28 Patriot Place, Foxborough, Massachusetts 02035

Biennially, leaders and staff of PLAN affiliates from across the country come together to share best practices and to exchange ideas and experiences about how to better serve the future planning needs of adults and children with disabilities. Equally welcome are organizations that are nonprofit trust administrators with well aligned missions and activities.

This year, an open proposal process produced a wide range of presenters and workshops that should be attractive to leaders and staff of all levels. Two new conference features: An external keynote speaker from a national organization with more than 300 affiliates across the country, and a film that explores whether society is equipped to care for the growing population of young adults with disabilities. Join us.

# National PLAN Alliance Conference Agenda

*Sharing Best Practices to Better Serve the Future Planning Needs of the Disability Community*

## Pre-Conference

*(all activities held at Renaissance Hotel unless otherwise stated)*

*Wednesday, June 20, 2018*

1:00 – 3:00 p.m.

**Tour of PLAN of MA and RI offices**  
50 Cabot Street, Suite 206, Needham, MA

3:00 – 7:00 p.m.

**Registration opens for NPA members**

6:00 – 10:00 p.m.

**Reception and dinner for NPA members**  
Location TBD

## Conference

*Thursday, June 21, 2018*

7:30 – 8:30 a.m.

**Registration for non-members**

7:30 – 9:00 a.m.

**Breakfast** *(provided)*

9:00 – 9:15 a.m.

**Welcome and announcements**  
Kerry Tedford-Coles, NPA, Executive Director

9:15 – 9:55 a.m.

**Keynote speaker**  
Kate Maple

9:55 – 10:15 a.m.

**Break – Visit sponsors and exhibitors**

10:15 – 11:45 a.m.

**Session 1: Breakout**  
Understanding Medicare Set Aside Arrangements: [Robert Mascali](#)

Collaboration and Advocacy: A Case Study Preserving SNPTs: [Nomita Ganguly](#),  
[Laura Silver Traiger](#), [Pamela Tames](#)

11:45 a.m. – 12:30 p.m.

**Session 2: Round table discussions**  
Led by NPA

12:30 – 1:30 p.m.

**Lunch** *(provided)*

1:30 – 3:00 p.m.

**Session 4: Breakout**  
Yes, Those Caregivers & Companions are Probably Somebody's Employees:  
[Sharon Novak](#)  
Empowering the Organization in Workplace Safety: [April Berry-Fletcher](#)

# National PLAN Alliance Conference Agenda

*Sharing Best Practices to Better Serve the Future Planning Needs of the Disability Community*

*Thursday, June 21, 2018 (continued)*

- 3:00 – 3:15 p.m. **Break – Visit sponsors and exhibitors**
- 3:15 – 4:45 p.m. **Session 4: Breakout**  
Navigating the Waters with Minor Trust Beneficiaries and Their Families: [Megan Brand](#), [Barb Helm](#), [Neal Winston](#)
- There's a POMS for That: An Overview of SSA POMS Relating to SNTs: [Anna Sappington](#)
- 4:45 – 5:00 p.m. **Wrap-up / Adjourn**

*Friday, June 22, 2018*

- 7:30 – 8:30 a.m. **Breakfast**
- 8:30 – 10:00 a.m. **Session 5: *Ethan at 21***  
Discussion to follow with photographer and filmmaker [Josephine Sittenfeld](#), author and parent [Cammie McGovern](#) and son [Ethan Floquet](#)
- 10:10 – 10:15 a.m. **Break – Visit sponsors and exhibitors**
- 10:15 – 11:45 a.m. **Session 6: Breakout**  
Managing Challenging Conversations: [Irina Tuchina](#)
- Who, What, When, Where, Why – Payment of Fees for Guardians, Conservators and Trustees –** [Audrey Boulanger](#), [Marlee Cowan](#) and [Lisa Judkins](#)
- 11:45 a.m. – 12:30 p.m. **Session 7: Round Table Discussions**  
Led by [NPA](#)
- 12:30 – 1:30 p.m. **Lunch**
- 1:30 – 3:00 p.m. **Session 8: Breakout**  
And the Music Played On: How Music and Music Therapy Can Support Beneficiaries: [Meredith Pizi](#)
- From Care Manager to Supervisor: [Christy Holland](#)
- 3:00 – 3:15 p.m. **Wrap-up / Adjourn**

# 11th Biennial National PLAN Alliance Conference

*Sharing Best Practices to Better Serve the Future Planning Needs of the Disability Community*

## Registration Form

June 20-22, 2018

Renaissance Boston Patriot Place Hotel, Foxborough MA

**Registration deadline: Friday, May 18, 2018**

**Registration fee** (includes lunches): \$200 for Non-PLAN members, \$150 for PLAN members

Checks can be made payable to National PLAN Alliance. Please complete the form below, and mail it with your check by the registration deadline Friday, May 18 to:

Nina M. Hamberger  
Enhanced Life Options Group  
3 Executive Park Drive, Suite 269  
Bedford, NH 03110

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

PLAN Program Affiliation?  No  Yes *If so, please list.* \_\_\_\_\_

Organization \_\_\_\_\_

Appropriate Designation:  Executive Director/Program Director  Board Member  Program Staff

Family Member  Other \_\_\_\_\_

Special Dietary Needs?  No  Yes *If so, please describe.* \_\_\_\_\_

### Hotel and Reservation Information

All conference activities will take place at the Renaissance Boston Patriot Place Hotel, 28 Patriot Place, Foxborough, MA 02035. A block of 45 hotel rooms has been reserved for the event at \$199 per night for single or double occupancy. This special price is available through May 22, 2018. Visit [Renaissance Hotel](#) or call the hotel at 508.543.5500 to reserve your room with code "NPA Group". *You must bring proof of your program's not-for-profit status to be exempt from room tax.*

# Thank You to Our Sponsors!

