

Law Offices
Lillesand, Wolasky and Waks, P.L.

CLEARWATER: 901 Chestnut Street, Suite C • Clearwater, Florida 33756 • Telephone: (727) 330-7895 • Fax: (727) 631-0970
ST. PETERSBURG: 146 Second St. N. Suite 301 • St. Petersburg, FL 33701 • Telephone: (727) 330-7895 • Fax: (727) 631-0970
MIAMI: Dadeland Towers • Penthouse 4 • 9400 S. Dadeland Boulevard • Miami, Florida 33156 • Telephone: (305) 670-6999

**Representing Florida's disabled children,
adults and their families with**

Social Security & SSI Disability Claims
Special Needs Trusts
Medicare Eligibility
Medicaid Planning
Wills & Trusts
Guardianship and Probate

David J. Lillesand, Esq.

Email: David@LillesandLaw.com

Jessica M. Lillesand, Esq.

Email: Jessica@LillesandLaw.com

Marjorie E. Wolasky, Esq.

E-mail: MWolasky@bellsouth.net

Deborah R. Waks, Esq.

Email: DeborahWaks@aol.com

Law Blog on SSI, Medicaid and Special Needs Trusts – www.FloridaSpecialNeedsLaw.com

Visit our Website on Social Security/SSI Disability claims – www.SocialSecurityTampaBay.com

RESUME OF DAVID J. LILLESAND

Personal:

Married to Dr. Diane V. Lillesand, retired Clinical Psychologist and current doctoral student in Asian Religions - Tibetan Buddhism and Hinduism, University of Florida, Gainesville

One child, Jessica, graduate of Duke University and University of Florida Law School, magna cum laude, 2008; partner, Lillesand and Associates, P.A., a member firm of Lillesand, Wolasky and Waks, P.L.



Languages: Fluent in Spanish, spoken and written; studying Norwegian

Education: J.D. (1972) *University of Wisconsin Law School*. Ford Foundation Fellowship, Tuition Remission Scholarship; and Bail Reform Project

B.A. (1966) *University of Minnesota (Political Behavior)*. Jules Frelin Scholarship; Senior Men's Honorary Society; Member, Student Senate; Student President Campaign Manager.

Graduate, (1966) *Claremont Graduate School/University of Michigan*, Joint Community Development Training Program, June–September, 1966, Claremont, California, with field work in Tijuana and Morelia, Mexico.

Graduate, (1989) Florida Supreme Court *Certified Mediation Training Program* for Family Mediators given by Florence Kazlow, Ph.D. and David Strawn, J.D.

Accepted to International Summer School 2012, *University of Oslo, Norway*, to study Contemporary Norwegian Society and Scandinavian Government and Politics, (full time, June 22 to August 8, 2012)

Bar Admissions and Certifications:

United States Supreme Court (1976)
United States Court of Appeals, Eleventh Circuit (1984)
United States District Court - Florida (1979)
Certified Family Mediator, Florida (1989-2001)
District of Columbia Bar (1978 - 2010)

Wisconsin Bar (1972 - 2010)
Florida Bar(1977 to present)

Recognitions and Honors:

Martindale-Hubbell AV[®] rating

Charter member, ACADEMY OF SPECIAL NEEDS PLANNERS. Member of the Academy's Attorney Advisory Board since 2008. Additional information available on the Academy's website, www.SpecialNeedsAnswers.com.

Society of Settlement Planners, Washington, D.C. – Honorary Member

Named in 2004 and 2005 as one of Florida's Legal Elite, a selection of the top 1.6% of the State's Legal Leaders as recognized by their peers in *Florida Trend Magazine*.

2003 Elder Law Attorney of the Year, The Florida Bar's Elder Law Section

2001 South Miami-Kendall Bar Association
Pro Bono Volunteer of the Year

1994 Plotkin Outstanding Legal Service Award by the South Florida Association for Retarded Citizens (ARC) for development of Special Needs Trusts to preserve Medicaid for disabled individuals who receive personal injury awards

1989 Florida Bar President's Pro Bono Service Award
for the Eleventh Judicial Circuit of Florida

1987 South Miami - Kendall Bar Association Award
Pro Bono Volunteer of the Year

1986-88 Selection as one of 36 Leading Florida Attorneys in Family Law

Bar-Related and Community Activities:

Lifetime Fellow of The Florida Bar Foundation

The Florida Bar
Elder Law Section
Executive Board,
Continuing Member at Large, 2005-2010
Vice Chair 2003-2004
Treasurer 2004-2006
Secretary 2002-2003
Special Needs Trust Committee 2000-12, Co-Chair, 2006-10
Social Security Disability Committee, Chair 2011-2012

South Florida Association for Retarded Citizens (ARC)
Advocacy Advisory Council 1986-Present

Guardianship and Case Management Services, Inc.
(Affiliated with the South Florida Association for Retarded Citizens)
President 1993-95

South Miami - Kendall Bar Association

President 1985-86
Treasurer 1984-85
Secretary 1983-84
Chairman, Pro Bono Project 1986-96
South Dade Pro Se Divorce Clinic Volunteer - 1986-95
Volunteer Attorney, Pro Bono Program, 1984- 2004

Dade County Bar Association

Probate and Guardianship Committee
Member 1994-2008
Chair, Subcommittee on Special Needs Trusts 2004-2005
Member, Subcommittee on Special Needs Trust Procedures 1999-2001
Legal Aid and Public Service Committee
Vice Chairman 1992-93
Member 1986-89, 1991-94
Family Court Committee
Member 1988-93
Public Interest Law Committee
Chairman 1983-84
Professional Arbitration Committee
Member 1982-83

Homestead Bar Association

President 1979-80
Secretary 1978-79

Calusa Homeowners Association

President 1984-86
Secretary 1983-84

Calusa Golf Course Homeowners Association

Founder - 1987
Treasurer-Secretary - 1987-89

Dade County Courts Comprehensive "Put Something Back Pro Bono Project

Member, Planning Committee 1991-94

South Dade Immigration Association

Steering Committee - 1987-88
Grant writer to the Florida Bar Foundation awarded 1987

South Florida Council on Divorce Mediation

Chairman of the Board, 1983-84
Board Member 1982-83

Employment:

Private Practice of Law - 1979 to Present – statewide practice in disability law

Florida Rural Legal Services

Executive Director 1974-1977
Homestead Managing Attorney 1977-1979

Special Master, United States District Court, District of Columbia

to monitor national enforcement of court orders in *NAACP v. Brennan*, 1975-77

Adjunct Professor, "Business Law," Homestead Air Force Base, (through St. Leo's College), Homestead, Florida, Fall Semester 1984.

Private Consultant, Legal Services Corporation
Washington, D.C. - 1977-79

Director, Migrant Division, Camden Regional
Legal Services, Bridgeton, N.J. 1972-74

VISTA Volunteer (Domestic Peace Corps, currently called AmeriCorps) - Laredo, Texas
Model Cities Program, Community Activist and Organizer for the
Community Participation Component, 1969-70

Peace Corps Volunteer and Promotor de Acción Communal - Colombia, South America
Rural Community Planning and Development Projects, 1966-68

Adjunct Professor, "English Language Training for Business Students," Centro
Colombo-Americano, Popayán, Colombia, 1967-1968.

Publications:

Lillesand, David J. and Marjorie E. Wolasky "Special Needs Trusts," Chapter 17 (93 pages) of **Administration of Trusts in Florida**, Seventh Edition (Publication date set for February, 2012), a legal practice manual for trust attorneys jointly published by LexisNexis Company, Albany, New York and The Florida Bar, Tallahassee, Florida; current Sixth Edition was authored in 2009 and published January, 2010.

Lillesand, David J. ***What Personal Injury Attorneys Need to Know about SSI, Medicaid and Special Needs Trusts***, an 18 page question and answer booklet, produced since 1994, revised annually and updated through January 2012.

Lillesand, David J. "A Summary and Analysis of SSA's New POMS for Trusts," published in **The ElderLaw Report**, Volume XX, Number 9, , by Aspen Publishers, Harry S. Margolis, Esq., Editor, pages 1-5 (April 2009).

Lillesand, David J. "SSI Trust and Transfer Rules," featured article in the "best of the best" edition of **NAELA Quarterly**, the Journal of the National Academy of Elder Law Attorneys, Volume 17, Issue 2, pages 3-18, Tucson, Arizona. (Spring 2004)

Lillesand, David J. "Recent Important and Favorable Changes in SSA Trust Policy," **Social Security Forum**, Vol. 23, No. 12, , National Organization of Social Security Claimants Representatives, New York (December 2001).

Lillesand, David J. and Dr. Diane V Lillesand, *The Role of Psychologists in Child Custody Litigation*, **Florida Bar Journal**, **73 FLA.B.J. 38** (January 1989).

Lillesand, D.; Kravitz, L.; & McClellan, J. *An Estimate of the Number of Migrant and Seasonal Farmworkers in the United States and the Commonwealth of Puerto Rico – Results of a One Year Study*, **Legal Services Corporation, Washington, D.C.**, May 1977, selected for inclusion in the permanent collection of the **National Equal Justice Law Library**, American University Washington College of Law.

David Lillesand's Speaking Engagements, Seminars and Lectures:

Currently scheduled future speaking engagements:

Special Trusts for Special Needs in the Courtroom, a 90-minute legal review and presentation to Florida Circuit Court Judges at the Advanced Judicial Studies Program, Naples, Florida, June 7, 2012.

Past speaking engagements:

SSI Update: Cases, Regulations and Changes in Disability Law and Policy; and Coordination with ObamaCare under our new National Health Insurance Policy. National Academy of Special Needs Planners, Memphis, Tennessee, March 8-12, 2012.

The Florida Bar's Certification Review Course – 2012, Advanced Level CLE program for attorneys preparing for the Florida Bar certification exam in Elder Law, sponsored by Elder and Disability Law Section of the Florida Bar, 2012: "Social Security and SSI," Orlando, Florida, January 19, 2012.

The Obama Administration's Affordable Care Act: The Immediate Implications for Today's Practice of Elder Law, author and facilitator for the Academy of Florida Elder Law Attorneys (AFELA) "UnProgram" in Orlando, Florida, December 13, 2011.

Filling the Gaps: Financial Planning and Strategies to Achieve Public Health Care when Private Insurance is Not Available. Florida Institute of Certified Public Accountants, Gold Coast Chapter, November 2, 2011, Ft. Lauderdale, Florida, and Society of Financial Service Professionals, November 17, 2011, Tampa, Florida.

Social Security, SSI, Medicare and Medicaid 101, part of Public Benefits in Nursing Homes and ALFs, a six credit continuing education seminar for nursing home and ALF administrators, social workers, admissions and discharge planners and nurses, focused on the use of public benefits for senior clients. St. Petersburg College Health Education Center, Pinellas Park, Florida, October 27, 2011.

Minor beneficiaries, growing up and going to work---child's benefits, aging out and working beneficiaries, with a focus on Medicaid 1619(b) programs. Stetson Law School's 2011 Annual three day National Conference on Special Needs Trusts, October 19-21, 2011, St. Petersburg, Florida.

The Affordable Care Act – Patient and Provider Issues, the Florida Bar Joint Presentation by the Bar's Health Law Section and the Elder and Disability Law Section,; presentations for two sessions: "An Overview of the Entire Affordable Care Act from the Patient's Perspective;" and "Practical Applications of the Act in 2011 and 2012 for our Elder and Disabled Clients." Orlando, Florida July 27, 2011.

What Obama's Health Care Legislation: What it Will and Will Not Do for Our Disabled Clients, Clearwater Bar Association's Elder and Disability Law Section, May 19, 2011, Clearwater, Florida.

SSI and Special Needs Trusts in the Era of Obama's Health Care Legislation: How it Changes the Prosecution of Social Security and SSI Disability Claims, National Organization of Social Security Claimant Representatives (NOSSCR) Annual Conference, Baltimore, Maryland, May 12-14, 2011.

SSI Update: Cases, Regulations and Changes in Policy; What it means for solving our disabled clients' problems. National Academy of Special Needs Planners, San Francisco, California, March 11-12, 2011.

The Florida Bar's Certification Review Course – 2011, Advanced Level CLE program for attorneys preparing for the Florida Bar certification exam in Elder Law, sponsored by Elder Law Section of the Florida Bar, 2011: “Special Needs Trusts – First Party, Third Party and Pooled Trusts; and Administration Issues for Bank Trustees,.” in Orlando, Florida, January 15, 2011.

The Obama Health Care PCIP Alternative in Planning for SSI and Medicaid, facilitator for the annual Academy of Florida Elder Law Attorneys (AFELA) “UnProgram” in Orlando, Florida, December 4, 2010.

“*Law Office Management of an SNT Practice*,” presented jointly with Attorney Stephen W. Dale (California), and a second program, “*The Essentials of SNTs*” with Attorneys Mary Alice Jackson (Florida) and Vincent J. Russo (New York), October 21, 2010, at the National Special Needs Trust Conference, Stetson Law School, St. Petersburg, Florida.

Introductory and Advanced SSI and SNT Issues for Elder Law Attorneys, Featured Guest Speaker for Michigan State Bar Association Annual Elder and Disability Rights Conference, Crystal Mountain, Michigan, October 6-8, 2010.

SSA Survivor and Dependent Benefits, a national Webinar for members of the Academy of Special Needs Planners, May 25, 2010, Boston, Massachusetts.

Special Needs Trusts and Regulations under the New POMS, National Organization of Social Security Claimant Representatives (NOSSCR) annual conference, New Orleans, Louisiana, May 12-15, 2010.

Update on SSI Rules for Special Needs Trust Drafting Attorneys, at the Fourth Annual Conference of the national Academy of Special Needs Planners, Charleston Place Hotel in Charleston, South Carolina, March 19-20, 2010.

Dealing with SSI Overpayments: Avoiding, Defending, Reducing, and Destroying, Florida Bar's Annual Public Benefits CLE Program, Tampa, Florida, March 12, 2010.

The Florida Bar's Certification Review Course – 2010, two Advanced Level CLE programs for attorneys preparing for the Florida Bar certification exam in Elder Law, sponsored by Elder Law Section of the Florida Bar, 2010: “Public Benefits, including Social Security, SSI, and related medical programs” and “Special Needs Trusts – First Party, Third Party and Pooled Trusts; and Administration Issues for Bank Trustees,.” in Orlando, Florida, January 14-15, 2010.

The new 2009 POMS: 8 Steps to a Perfectly Drafted Trust and the 5 rules for Special Needs Trust Administration, Palm Beach County Bar Association, annual continuing legal education program, West Palm Beach, Florida, December 15, 2009.

Supplemental Security Income (SSI) Basics and Social Security, SSI and Family Law, two programs for North Carolina Elder Law Attorneys at the North Carolina Bar Center, Cary, North Carolina, October 30-31, 2009.

The Complete SNT Drafting Workshop, a three hour presentation for the ASK 2009 a national annual seminar sponsored by the Academy of Special Needs Planners, Don Cesar Beach Resort, St. Petersburg, Florida, October 17, 2009.

Special Needs Trusts, SSI and Medicaid – from Initial Interview to Trust Termination, a three hour seminar for legal aid and legal services attorneys, Legal Services of Greater Miami, Inc., Miami, Florida, August 4, 2009.

The January 2009 New Federal Rules on Special Needs Trusts, a Webinar presentation to the membership of the Florida Academy of Elder Law Attorneys, broadcast statewide, June 11, 2009.

First Thing We Do: Let's Stop Killing Your Clients, 2009 Financial Planners Association Annual Conference, Westin Hotel at Cypress Creek, Fort Lauderdale; specific advice to CPAs and other financial planners on qualifying clients for Medicare and Medicaid benefits, May 2, 2009.

Special Needs Trust under the 2009 New POMS, an advanced presentation for the "Elder Law Concert" program, for the Academy of Florida Elder Law Attorneys, Tampa, Florida, March 28, 2009.

The Florida Bar's Annual Public Benefits Course – Family Law, Family Relationships, SSDI and SSI, an Advanced Level CLE program sponsored by Elder Law Section of the Florida Bar, in Tampa, Florida, March 20, 2009.

SSI Update: Review of all 2006, 2007 and 2008 SSA Regional Chief Counsel Precedents (Opinion Letters) on Trusts, at the Third Annual Meeting of the Academy of Special Needs Planners, "Special Needs Planning in the Era of Change," San Diego, California, March 5-8, 2009.

The Florida Bar's Certification Review Course – 2009, two Advanced Level CLE programs for attorneys preparing for the Florida Bar certification exam in Elder Law, sponsored by Elder Law Section of the Florida Bar, in Orlando, Florida, January 8, 2009: "Public Benefits, including Social Security, SSI, and related medical programs" and "Special Needs Trusts – First Party, Third Party and Pooled Trusts; and Administration Issues for Bank Trustees."

SSI Advocacy – Financial Eligibility Issues, Keynote Speaker presenting an advanced level program on managing assets and income to comply with SSI income and resource rules, with a focus on parental and spousal deeming, at the 2008 Advanced Elder Law Institute of the National Academy of Elder Law Attorneys, Kansas City, Missouri, October 23-26, 2008.

Advanced Special Needs Trusts X: Hot SSI Trust Issues in 2008, the annual national CLE program for advanced practitioners of special needs trust law (bankers and lawyers), sponsored by the Office for Continuing Legal Education and the Elder Law Center of the Stetson University College of Law, Gulfport, Florida, Friday, October 17, 2008.

The Basics of Special Needs Trusts: SSI Eligibility Rules, a national CLE program on a basic and intermediate level of major issues presented by the creation, administration and monitoring of special needs trusts for trust attorneys and bank trust administrators, sponsored by the Office for Continuing Legal Education and the Elder Law Center of the Stetson University College of Law, Gulfport, Florida, October 16, 2008.

Advanced Topics: Social Security, Medicare & Medicaid – It Just Keeps Changing, a presentation at the 21st Annual Conference of Florida State Guardianship Association, St. Augustine, Florida, August 9, 2008.

The Program Operations Manual System (POMS) of the Social Security Administration: an in depth seminar on how to use the POMS to protect and advocate for your client, a “webinar” (Internet seminar) presentation for fellow members of the Academy of Special Needs Planners, July 8, 2008.

Trust Administration: the “special” rules of Special Needs Trusts, a half day workshop for the Charlotte, North Carolina, and Fort Lauderdale, Florida, Trust Officers and Trust Administrators of Wachovia Bank, July 2, 2008.

Practical Aspects of Special Needs Planning, Part 1: Government Benefits – What You Already Know and the Rest of the Story, a national Internet presentation for the American Bar Association, Section on Real Property, Trust and Estate Law and the ABA Center for Continuing Legal Education, 90-Minute Teleconference and Live Audio Webcast, June 3, 2008, with ABA Web Board follow up questions for 30 days.

Don't win the medical disability battle but lose the SSI eligibility war: litigation strategies to fix the SSI financial eligibility problems early in your SSA representation. An advanced level national seminar for 500 practicing Social Security attorneys, sponsored by the National Organization of Social Security Claimant Representatives (NOSSCR), Loews Miami Beach, Florida, June 4, 2008.

The Florida Bar's Annual Public Benefits Course – SSDI and SSI – Differences and Similarities, an Advanced Level CLE program sponsored by Elder Law Section of the Florida Bar, in Orlando, Florida, April 11, 2008.

Can I do that? SSI Rules for Trust Administration, co-presented with Ken Brown, Esq., Attorney and Policy Analyst, Social Security Administration, Baltimore Headquarters, at the Second Annual Meeting of the Academy of Special Needs Planners, “Beyond Nuts and Bolts: When Theory Meets Reality,” New Orleans, Louisiana, March 28-29, 2008.

Oil and Water: Structured Settlement Annuities and SSI, Medicaid, and Special Needs Trusts. An educational seminar at the Annual Conference of the Society of Settlement Planners, an organization of plaintiff's structured settlement annuity professionals, Washington, D.C., March 6, 2008.

The Florida Bar's Certification Review Course – OASDI and SSI - 2008, an Advanced Level CLE program for attorneys preparing for the Florida Bar certification exam in Elder Law, sponsored by Elder Law Section of the Florida Bar, in Orlando, Florida, January 24-25, 2008.

Multiple Myeloma, Social Security and SSI Disability Benefits, Estate and Guardianship Issues, Multiple Myeloma Support Group, Miami Wellness Center, October 24, 2007.

SSI Session Facilitator, “The 2007 ASNP Ask Program,” Academy of Special Needs Planners, Clearwater Beach, Florida, October 18, 2007.

SSA's SSI, SSDI, Widow's, DAC/CDB Disability Programs – understanding the alphabet soup of the Social Security Administration's various disability programs, including basic eligibility, the application process, and the path to successful appeals. The 20th Annual Conference of the Florida State Guardianship Association at the Hyatt Regency Bonaventure Conference Center and Spa in western Fort Lauderdale, August 2-4, 2007.

Understanding Special Needs Trusts: What the Trust Administrator Needs to Know, an in-service workshop for trust administrators, Coral Gables Trust Company, Coral Gables, Florida May 22, 2007.

“The ethical and prudent thing to do: whether, when and how to give financial planning advice to SSI clients on retaining SSI and SSI-related Medicaid benefits.” an advanced level national seminar for 300 practicing Social Security attorneys, sponsored by the National Organization of Social Security Claimant Representatives (NOSSCR), Baltimore, Maryland, April 18, 2007.

New SSI Developments in Special Needs Planning, at the First Annual Meeting of the Academy of Special Needs Planners, “Taking Special Needs Planning to the Next Level,” Stone Mountain, Georgia, March 23-24, 2007.

The Basics of a Social Security Disability Law Practice, a one-half day, Florida Bar approved program by Stetson University College of Law, as a precursor course for the Fourth Annual Social Security Disability Law Conference, Clearwater, Florida, March 2, 2007.

The Florida Bar’s Certification Review Course – OASDI and SSI - 2007, an Advanced Level CLE program for attorneys preparing for the Florida Bar certification exam in Elder Law, sponsored by Elder Law Section of the Florida Bar, in Orlando, Florida, January 25-26, 2007.

Special Needs Trusts: SSI Eligibility Issues, lead facilitator for the Academy of Florida Elder Law Attorneys “7th Annual Meet the Experts Unprogram,” Orlando, Florida, December 2, 2006.

Is it for you? Representing Social Security/SSI Disability Claimants as Part of Your Elder Law Practice. Special Needs Trust Breakout Session at the 2006 NAELA Institute, November 3, 2006, Salt Lake City, Utah.

What is “Elder Law?” Towards a “Unified Field Theory” of an Emerging Practice. A guest lecture presentation to the Estates, Trusts and Elder Law Society of the University of Florida Levin College of Law, October 25, 2006, Gainesville, Florida.

SNT VIII - SSI Update, with Special Emphasis on the Complex Rules of Parental and Spousal Deeming in Special Needs Trust Administration. the eighth annual national CLE program for advanced practitioners of special needs trust law (bankers and lawyers), sponsored by the Office for Continuing Legal Education and the Elder Law Center of the Stetson University College of Law, Gulfport, Florida, Friday, October 20, 2006.

Swim Deep & Paddle Fast: An In-Depth Medicaid Special Needs Trust Review, a four-hour presentation to Professional Guardians and Attorneys at the 19th Annual conference of the Florida State Guardianship Association, in Orlando, Florida, August 3, 2006.

Picking the Right Case and Spotting the Hidden SSI Issues in a Social Security Law Practice, solo presentation, and participation on panel on *Technology and Disability Cases – Hearings by Video Conference*, Stetson University College of Law, Third Annual Social Security Disability Law Conference, St. Petersburg, Florida, May 19-20, 2006.

The Florida Bar’s Certification Review Course – OASDI and SSI - 2006, an Advanced Level CLE program for 90 attorneys preparing for the Florida Bar certification exam in Elder Law, sponsored by Elder Law Section of the Florida Bar, in Miami, Florida, January 20, 2006.

Special Needs Trusts: SSI Eligibility Issues, lead facilitator for the Academy of Florida Elder Law Attorneys “Unprogram,” Orlando, Florida, December 3, 2005.

Law School Guest Lecturer, Elder Law Seminar, University of Miami Law School, on *Special Needs Trust Legal Issues in 2005*, Russell E. Carlisle, Professor, November 14, 2005.

University Guest Lecturer on *Ethical and Legal issues in Aging – Competency, Guardianship and Advance Directives*, a two hour class presentation to graduate students as part of “Ethical, Legal, and Professional Issues in Rehabilitation Counseling,” Department of Rehabilitation Counseling, Dr. Linda Shaw, Professor, University of Florida, Gainesville, Florida, November 7, 2005.

Guardianship and Special Needs Trusts – How Trusts Can Assure Your Ward’s Access to Future Medical Care, Florida Statewide Guardianship Association Annual Conference, Doral Resort and Country Club, Miami, Florida, August 6, 2005.

Recent Update on Social Security and SSI Disability Law, CLE seminar on Special Needs Trusts, sponsored by the Georgia State Bar Association, Atlanta Georgia, April 28, 2005.

Special Needs Trusts – What Estate Planners Need to Know, Broward County Estate Planning Council, Boca Raton, Florida, January 20, 2005.

Elder Law Certification Review Course – SSI OASDI and Special Needs Trusts, an Advanced Level CLE program for 90 attorneys preparing for the Florida Bar certification exam in Elder Law, sponsored by Elder Law Section of the Florida Bar, at Miami Lakes, Florida, January 14, 2005.

SSI Eligibility Rules – Practice and Procedure for 2005 and Beyond, an advanced level national seminar for 400 practicing Social Security attorneys, sponsored by the National Organization of Social Security Claimant Representatives (NOSSCR), Philadelphia, Pennsylvania, November 11, 2004.

Advanced Special Needs Trusts VI: SSI Update 2004, the annual national CLE program for advanced practitioners of special needs trust law (bankers and lawyers), sponsored by the Office for Continuing Legal Education and the Elder Law Center of the Stetson University College of Law, Gulfport, Florida, Friday, October 22, 2004.

Keynote Speaker for the 10th Annual Douglas Gardens All-Day Seminar on “*Navigating the Maze and Finding Solutions: Social Security, Medicare, Medicaid and More – a seminar, luncheon and resource fair for Interfaith Clergy and Allied Professionals*” Wednesday, June 16, 2004 at the Sands Conference Center, Miami, Florida.

Conference on Settlement Strategies: Enhancing & Leveraging Recoveries in Complex Tort Cases, sponsored by the University of Florida and Law Pro Seminars, May 20-24, 2004, aboard the Royal Caribbean Cruise Ship “Enchantment of the Seas” (5 Days/4 nights). David Lillesand’s presentations during the multi-day conference included:

- *Accessing Continued Medical Care for Your Client – Understanding the Four Part Entitlement System in the Social Security Act and Third Party Liability versus Estate Recovery Lien Statutes - The Government’s Right of Recovery for Medicaid and Medicare Benefits*: Friday, May 21: 5 pm – 6 pm
- *Understanding Special Needs Trusts: Substantive and Procedural Issues; Practical Steps to Ensure Total Client Satisfaction*: Saturday, May 22: 530 pm – 730 pm

- *Special Issues in Special Needs Trust Practice, including Structured Settlement Annuities, and Ethical and Legal Malpractice Claims against Personal Injury and Estate attorneys:* Sunday, May 23: 1 pm – 2 pm

Multiple Myeloma – Proving Disability in Social Security/SSI Claims – Miami Wellness Center, Wednesday, April 28, 2004.

Cancer and Social Security and SSI Disability Insurance Claims – Proving Your Entitlement to Disability Payments which Triggers Medicare and Medicaid Health Insurance Coverage – Miami Wellness Center, Thursday, April 29, 2004.

Miami-Dade Estate Planning Council: "Protecting Your Clients' Assets: Assuring Access to Public Health Insurance Programs through Medicare and Medicaid Eligibility - Special Needs Trust Issues for Financial Planners, Estate Planning Attorneys, and Certified Public Accountants", Miami City Club, Miami – Thursday, April 22, 2004.

CELA Certification Review Course – SSI and OASDI, an Advanced Level CLE program for 90 attorneys preparing for the Florida Bar certification exam in Elder Law, sponsored by Elder Law Section of the Florida Bar, at Lake Mary, Florida, January 23-24, 2004.

New Jersey State Bar Institute for Continuing Legal Education: Sophisticated Elder Law IX - SSI Developments, a National Perspective, an advanced level program for New Jersey Elder Law specialists, at The Law Center, New Brunswick, New Jersey, January 7, 2004.

NAELA Institute for Advanced Attorney Practitioners – The SSI Attorney and the Bank Trust Officer Duet on the Legal Issues in the Professional Management of Special Needs Trusts – the annual Advanced Elder Law Institute for National Association of Elder Law Attorney members, Dallas, Texas, November 12-15, 2003.

The Basics of Special Needs Trusts: SSI Eligibility Rules, a national CLE program on a basic and intermediate level of major issues presented by the creation, administration and monitoring of special needs trusts for trust attorneys and bank trust administrators, sponsored by the Office for Continuing Legal Education and the Elder Law Center of the Stetson University College of Law, Gulfport, Florida, October 23, 2003.

Advanced Special Needs Trusts V: SSI Update 2003, an annual national CLE program for advanced practitioners of special needs trust law, sponsored by the Office for Continuing Legal Education and the Elder Law Center of the Stetson University College of Law, Gulfport, Florida, October 24, 2003.

The Ninth Annual Brain Injury Symposium, "New Dimensions in Brain Injury Rehabilitation" - Proving Medical Disability in Social Security Claims - a symposium sponsored by Baptist Hospital for 200 doctors, nurses and rehabilitation consultants and other medical staff on the legal proof of medical disability claims before federal Administrative Law Judges for victims of traumatic and organic brain injuries to win SSDI and SSI disability benefits and Medicare and Medicaid health insurance, Wyndham Miami Beach Resort, September 13-14, 2003.

The Creation and Management of Special Needs Trusts – a half-day Program for Trust Administrators employed by First Guaranty State Bank and Trust Company, Jacksonville, Florida, August 28, 2003.

South Florida Guardianship Association Annual Professional Guardian Training Program, – Creation and Management of Self-Settled Special Needs Trusts. Jackson Memorial Hospital, Miami, Florida, May 30, 2003

Social Security Administration Appeals of Adverse Determinations of (d)(4)(A) Special Needs Trusts – Practical and Procedural Issues. NAELA Symposium, National Association of Elder Law Attorneys, Dallas, Texas, May 15-18, 2003

Keynote Speaker: *SSI POMS Analysis of d4A Special Needs Trusts*, at the three-day symposium, *Elder Law Practice: Estate Planning, Special Needs Trusts, and Guardianship*, South Texas College of Law, Houston, Texas, May 8-10, 2003.

Top Ten Tips for Winning Social Security Disability Cases: Stetson University College of Law, first annual Social Security Disability Law Conference, April 25, 2003.

Featured Speaker: *Social Security Disability Insurance, SSI, Medicaid, Medicare, Guardianships and Special Needs Trusts: Issues for Disabled Individuals in the New Millennium.* The Brain Injury Support Group, North Broward Hospital, Pompano Beach, Florida, an introductory program to 50 patients and their families, March 18, 2003

Practical Procedural Issues: Securing SSA Approval of (d)(4)(A) SSI/Medicaid Special Needs Trusts and Appealing Adverse Decisions – 7th Annual Public Benefits Seminar, an Advanced Level CLE program for 98 attorneys sponsored by Elder Law Section of the Florida Bar, at Cocoa Beach, Florida, January 25, 2003.

Florida Bar Certification Review Course – SSI OASDI and Special Needs Trusts, an Advanced Level CLE program for 90 attorneys preparing for the Florida Bar certification exam in Elder Law, sponsored by Elder Law Section of the Florida Bar, at Cocoa Beach, Florida, January 23-24, 2003.

New Legal Issues in the Creation and Administration of Special Needs Trusts, an advanced level seminar for 300 Social Security attorneys, sponsored by the National Organization of Social Security Claimant Representatives (NOSSCR), San Francisco, California, October 31, 2002.

Special Needs Trusts IV: Analysis of Special Needs Trusts through the Social Security POMS and the Six Most Common Mistakes in Drafting Special Needs Trusts, a national CLE program for 220 advanced level trust attorneys and bank trust administrators, sponsored by the Office for Continuing Legal Education and the Elder Law Center of the Stetson University College of Law, Gulfport, Florida, October 18, 2002.

Government Benefits: Social Security, SSI, Medicare and Medicaid, two presentations at the biannual “Clergy and the Courts Seminar,” sponsored by the Miami-Dade County Probate and Guardianship Committee of the Dade County Bar Association, at the Dade County Courthouse, April 30 and May 1, 2002.

Qualifying and Maintaining Eligibility for Children and Adults for Social Security, SSI, Medicare and Medicaid Benefits, in-service training for professional staff of the Greater Miami Jewish Federation, April 15, 2002.

Alternatives to Special Needs Trusts Suggested by the New Social Security POMS and the Four Most Common Mistakes in Drafting Special Needs Trusts made by Attorneys, an Advanced Level Florida Bar CLE Course and presentation to the Florida Bar’s Public Benefits Section, Palm Beach, Florida, April 5, 2002

Symposium 2002: The Role of Special Needs Trust in Financial Planning, presentation of a Continuing Education Credits program to the Society of Financial Service Professionals, Miami Chapter, Radisson Hotel, Miami, Florida, March 22, 2002.

Creation and Management of Self-Settled Special Needs Trusts, preparation of written materials and presentation to approximately 100 attorneys and judges at the University of Miami Faculty Club monthly probate luncheon, sponsored by Gibraltar Bank, February 15, 2002.

Trust Officer Management of Special Needs Trusts, presented to Northern Trust Bank Trust Administrators, in Miami, Florida, February 8, 2002.

Government Benefits (Social Security Retirement, Disability, SSI, Medicare and Veterans Benefits), preparation of an Advanced Level Florida Bar CLE chapter and presentation at the Florida Bar's Elder Law Section Course for attorneys seeking Florida Bar Certification as Elder Law Specialists, January 24-25, 2002, Tampa, Florida.

Minors can be Major Problems: the Use of Special Needs Trusts, a one-hour continuing education program sponsored by the Financial Planning Association of Miami-Dade, Coral Gables, Florida, January 8, 2002.

Special Needs Trusts: Qualifying Disabled Persons Under Age 65 for Medicaid and SSI Disability Payments, a one-hour continuing education program for Professional Guardians sponsored by the South Florida Guardianship Association, November 7, 2001.

SSI/Medicaid Eligibility Issues for Trust Administration, a half-day course for SunTrust Bank Trust Administrators in-service training, May 18, 2001, Miami, Florida.

More on SSI and SSDI: Difference between SSI and Social Security Disability Benefits, Social Security Regulation of Attorney's Fees, and Income and Resource Rules that Affect Trust Administration, a written CLE chapter and a presentation to the Florida Bar Elder Law Section, April 8, 2001, Fort Lauderdale, Florida.

Social Security Disability Insurance, SSI, Medicaid, Medicare, Guardianships and Special Needs Trusts: Issues for Disabled Individuals in the New Millennium. Presentation to the Young People's Stroke Club, Health South of Broward County, April 2, 2001 [the night Duke University won the 2001 NCAA National Basketball Championship].

Top Ten Things Every Elder Law Attorney Needs to Know about SSI and Social Security, a Florida Bar CLE chapter and presentation at the Florida Bar's Elder Law Section Annual Retreat, September 8-11, 2000, West Palm Beach, Florida.

Nouveau Riche on Welfare: How to Use Special Needs Trusts to Maintain SSI and Access to Medicaid under the 1999 Changes to the Social Security Act, written materials and presentation to 300 Social Security attorney specialists in SSI issues in a national workshop on the changes to the SSI and Medicaid statutes, rules and regulations caused by Public Law 106-169, presented at the National Organization of Social Security Claimant Representatives, May 3-7, 2000, Orlando, Florida.

Spending Money from Trusts: Overview of the Income and Resource Rules of the SSI Program for Trustees of Special Needs Trusts – a monograph directing Trustees on proper methods of disbursing funds from Special Needs Trusts to follow the federal regulations of the Social Security Administration to preserve clients' eligibility for both SSI and Medicaid benefits, first produced in 1996, with annual revisions through 2012.

Special Needs Trusts – Florida Bar CLE Facilitator for Group Discussion at Florida Bar's Elder Law Section Program, December 4, 1998, Ft. Myers, Florida.

Social Disability Law - Understanding and Implementing the 1996 Changes, Florida Bar CLE program lecturer on "New Provisions Regarding Children's Disability Benefits and Tips for Coping with the New Rules," and "New Rules Regarding SSI Retroactive Benefits:" June 12, 1997, Miami (Live); June 13, 1997 (Tampa taping session) for replay at 8 additional locations.

Words of Wisdom from the Experts, Florida Bar CLE program lecturer on "Social Security Law on the Internet" and "Updates on the Law of Special Needs Trusts to Preserve SSI and Medicaid;" March 21, 1996 Miami (live); March 22, 1996 Tampa (videotaped) for replay at 7 additional locations in Florida.

Social Security and Workers Compensation-A Practitioner's Understanding, Florida Continuing Legal Education course for Workers Compensation attorneys sponsored by Professional Education Systems, Inc., Miami, July 12, 1995.

Planning for your Child's Future, South Florida Association for Retarded Citizens-, Annual Meeting, May 18, 1995.

Lillesand, David J., "Defending SSI Claimants' Rights to Continued Benefits: Establishing Special Needs Trusts to Preserve Eligibility," Chapter 6, *Social Security Law for the Advanced Practitioner*, The Florida Bar, Tallahassee, Florida, March 1995.

"SSI Claimants' Rights to Continued Benefits through Special Needs Trusts," Florida Bar CLE Program, Miami and Tampa, Florida, March 9-10, 1995.

"Legal Issues: Working with Families of Disabled Children with Medically Complex Conditions," Mailman Center, University of Miami School of Medicine, on-going quarterly training for medical professionals, 1994 to 1999.

Lillesand, David J., "Developing the Disability Case," Chapter 2, *Social Security Disability Practice*, The Florida Bar, Tallahassee, Florida, March 1994.

"Social Security Disability Practice: The Nuts and Bolts," Public Interest Law Sections' Florida Bar CLE Program, Live on March 3 (Miami) and March 4 (Tampa), and by videotape at Ft. Myers, Tallahassee, West Palm Beach and Jacksonville in March, April and May, 1994.

Lillesand, David J., "Developing Mental Impairment Cases," Chapter 3, *Social Security Disability Law*, The Florida Bar, Tallahassee, Florida, March 1993.

"Social Security Disability Law: Advocacy Tips," Public Interest Law Section's Florida Bar CLE Program, Live on March 4 (Miami) and March 5 (Tampa), and by videotape at Ft. Myers, Tallahassee, West Palm Beach and Jacksonville in March and April, 1993.

"Planning for the Adult Disabled Child - Protection through Guardianship, Wills and Trusts," a 3 hour seminar for parents of disabled high school age children, Dade County Public Schools, Division of Exceptional Student Education at quarterly presentations at rotating schools for parent groups, March 1991 to the Present.

"The Role of Treating Physicians in Social Security Disability Claims," a lecture to staff physicians of the CHI Community Health Center, May 16, 1989.

"Proving a Successful Claim for Social Security Benefits," a lecture to 30 lay and professional members of the Head Injury Support Group of Dade County Florida on December 13, 1988.

"Florida Adoption Law - 1987," a two-hour seminar presented to certificate students of Judge Allen Kornblum's class at the Paralegal Institute, University of Miami, November, 1987.

"Attorneys Fee Applications Under the Federal Equal Access to Justice Act," a Florida Bar CLE training program for attorneys, September 18, 1987.

"SSI and Developmental Disabilities," a presentation to parents of Down's Syndrome children for the Association for Retarded Citizens of Dade County, February 26, 1986; November 20, 1986; March 30, 1988; April 21 and 29, 1988.

"Child Custody Issues," a presentation with Marshall G. Wisehart, Esq. and Dr. Diane Lillesand for the Missing Children Services Project, Switchboard of Miami, Inc., September 30, 1986.

"The Ideal Husband for the Working Woman," a seminar presented with Dr. Diane Lillesand at the St. Francis Hospital Family Workshop, November 22, 1986.

"Divorce Mediation Training: Equitable Distribution of Marital Property in Florida," an advanced training workshop presented to divorce mediators for the South Florida Council on Divorce Mediation, Inc., May 31, 1984.

"Litigation of Social Security and SSI Disability Claims," a Florida Bar CLE training seminar presented to private attorneys and paralegals sponsored by Legal Services of Greater Miami, Inc., April 8, 1983.

"Confidential Communications in Therapy: The Psychotherapist-Patient Privilege," a presentation to physicians, psychologists and mental health professionals at the CHI Community Mental Health Center, July, 1982.

"Legal Issues Affecting the Elderly in Florida," a presentation to the Gerontology Training Workshop, Department of Social Work, Florida International University, July, 1980.

"Florida Family Law Issues," a presentation to Ph.D. students in the Department of Educational Psychology, University of Miami, October, 1980.

Television and Radio Appearances:

Featured Guest, "The Killing of Alisa Wilson: Medicaid (Mis)Managed Care in Florida," a one-hour presentation and call in radio program, WMNF 88.5FM, hosted by Rob Lorei, December 29, 2010.

Featured Guest, "Money Talks" one-hour live call in Television Program on WLRN TV, Miami, on *"Planning for Children with Disabilities,"* sponsored by the Miami-Dade Association of Insurance and Financial Advisors, September 24, 2001.

Featured Guest, "Sommerkamp Financial Hour" Listener Call-in Radio Show, with Kristina J. Sommerkamp, Registered Investment Advisor, on WSBF 740am, Boca Raton, Florida, May 21, 2001.

Featured Guest, "You and the Law – Social Security Disability Law," WLRN-TV Channel 17, one-hour television call-in show hosted by Circuit Judge Lester Langer to answer viewer questions on Social Security law; December 8, 1997, in Miami, Florida.

Volunteer lawyer/actor in "*Lawyers On Call: Children of Divorce*," produced by WLRN-TV Channel 17 with the Dade County Bar Association; a one hour docu-drama on child custody issues, November, 1986 (winner of First Place Award for Best Public Service Project by American Bar Association Young Lawyers Division – but not because of my acting).