Timothy L. Takacs, CELA

Programs and Presentations

2021

Succession Planning CLE
Presented at Tennessee NAELA Annual Meeting; July 2021

Ins and Outs of Entering and Exiting a Law Firm Partnership
Presented to NAELA; March 2021

Succession Planning
Presented to NAELA annual conference; February 2021

2020

Business Continuity Planning in response to COVID-19
Presented at the Tennessee Bar Association Virtual Elder Law Forum, July 2020

2019

Probate
Tennessee Attorneys Memo; December 2019

Elder Law Basics in Jamestown
Presented to the Tennessee Bar Association; November 2019

Estate Recovery
Presented to attendees of the Equal Justice University (annual statewide public interest law conference) at Embassy Suites in Murfreesboro; August 2019

10 Things You Need to Know, Now
Presented to members of the St. Paul Episcopal Church in Murfreesboro; June 2019

The New Elder Law: What is Life Care Planning?
Presented to healthcare professionals at the 2019 Time Out Workshop; June 2019

Aging Matters – Legal Help at Belmont School of Law
Panel Discussion at Belmont School of Law; May 2019

10 Things You Need to Know, Now
Presented to professionals and caregivers as part of Mental Health America's "Just the Facts" class at TrustPoint Hospital in Murfreesboro; April 2019

Elder Law
Presented to the KY Elder Law Section in Lexington, KY; April 2019

10 Asset Protection Mistakes, Urban Legends, and FAQ about Powers of Attorney
Presented to the KEY program at Volunteer State Community College in Gallatin, TN; March 2019

2018

How Care Gets Paid for in Today's Elder Care Continuum
Presented at the 10th Annual Probate & Estate Planning Conference; December 2018

Asset Protection Mistakes
Presentation to Notre Dame Alumni; August 2018

Elder Care Law
Presented to Williamson County Bar Association to provide Continuing Legal Education credits; August 2018

Special Needs Trusts
Presented to attendees of the United Mitochondrial Disease Foundation national conference at the Sheraton Music City; June 2018

The Nursing Home Quiz
Presented to health care professionals at the Senior Services Network North Meeting in Hendersonville; June 2018

Urban Legends Regarding Estate Planning
Presented to the Sumner County Military Officers Association of America at the VFW in Hendersonville; May 2018

Elder Care Law
Presented to the Office of the Tennessee Attorney General to provide Continuing Legal Education credits; May 2018

Succession Planning
Presented to the Tennessee Bar Association; March 2018

How Care gets paid in Today's Elder Care Continuum
Presented to the Rutherford County Council on Aging and the Rutherford County Senior Providers Network at Life Care Centers of America in Antioch; February 2018

The Nursing Home Quiz
Presented to health care professionals at Goals of Care Geriatric & Palliative Medicine in Clarksville, TN; January 2018

2017

TBA Attorney Planning - Columbia
Presented as part of the Court Square Series at First Famer's Bank in Columbia; October 2017

TBA Attorney Planning - Clarksville
Presented as part of the Court Square Series at the Customs House Museum in Clarksville; October 2017

TBA Attorney Planning - Cookeville
Presented as part of the Court Square Series on the Cookeville Higher Education Campus; October 2017

Elder Law
Presented to the Tennessee Bankers Association; October 2017

Getting Older: 10 Survival Tips
Presented at evening workshop open to the general public at the Sumner County YMCA in Hendersonville; April 2017

How Care Gets Paid in Today's Elder Care Continuum
Presented at continuing education workshop to case managers at St. Thomas West; March 2017

What Care Costs
Presented to Lincoln Financial Advisors; February 2017

2016 and Earlier

Life Care Planning for the Elderly Client: Fundamentals and Practice
Presented with Marsha Goodman, CELA, and Debra King, LMSW, for the Life Care Planning Law Firms Association, Phoenix, AZ; May 2016

Life Care Planning for the Elderly Client: Fundamentals and Practice Webinar
Four-part series presented with Marsha Goodman, CELA, Dennison Keller, Esq., and Debra King, LMSW, for the Life Care Planning Law Firms Association; April 2016

Caring for the Elder in the Practice of Law, part 1: Chronic Illness Care in the U.S.-The Problem and the Solutions (Keynote) and **Caring for the Elder in the Practice of Law, part 2: Planning Along the Elder Care Continuum**
Presented to 2015 Fall Conference of the State Bar of Michigan Elder Law and Disability Rights Section (ELDRS), Boyne Falls, MI; October 2015

Life Care Planning: The New Elder Law
Presented to the Elder Law Section 2015 Spring CLE Seminar, Kentucky Bar Association; Louisville, KY, April 2015

Caring for the Elder in the Practice of Law: Chronic Illness Care in the United States
Presented as the Keynote Address and a subsequent breakout session, to the 2014 Elder Law Institute, Minnesota State Bar Association, Minneapolis, MN; October 2014

Aging Matters
Provided expert commentary on financial, legal and personal planning issues on Aging Matters, a documentary produced by Nashville Public Television, Nashville, TN; July 2014

Opportunities for Geriatric Care Managers Created through Life Care Planning Law Firms and Patient-Centered Medical Homes
Presented to the National Association of Geriatric Care Managers 2014 Annual Conference, Nashville, TN; May 2014

Capacity for Decision Making and Use of Advance Directives
Presented at the American Medical Directors' Association Long Term Care Medicine, Nashville, TN, March 2013

Life Care Planning Alternatives: Achieving an Interdisciplinary Approach to Chronic Health Care Needs
Presented with Elder Law attorneys Peter Sisson (Boise, ID) and Rajiv Nagaich (Seattle, WA) at the Annual Meeting of the National Academy of Elder Law Attorneys, Seattle, WA; April 2012

Life Care Planning Fundamentals for Elder Care Coordinators
Presented with Debra King, LMSW to the Life Care Planning Law Firm Association in Chicago, IL; September 2009

Elder-Centered Legal Planning
Presented to the National Aging and Law Conference, Arlington, VA; December 2008

Practice Management Best Practices
Presented to LexisNext Practice Management Annual Conference, Chicago, IL; August 2008

Life Care Planning
Presented to the Annual Public Benefits Institute, Florida Bar Association, Tampa, FL; April 2008

The New Elder Law
Presented to the Annual Meeting of the Missouri Chapter of the National Academy of Elder Law Attorneys, Branson, MO; May 2007

Medicaid Eligibility after the Deficit Reduction Act of 2005
Presented to the Annual Meeting of the American Health Lawyers Association, Orlando, FL; February 2007

Making Change Happen in the Elder Law Firm
Presented to the Annual Elder Law Institute, Pennsylvania Bar Institute, Harrisburg, PA; July 2006

An Elder-Centered Approach to Long-Term Care Planning
Presented to the Annual Elder Law Symposium, National Academy of Elder Law Attorneys, San Francisco, CA; May 2005

The Blumberg Election: Going to Court to Increase Medicaid's Spousal Allowances, NAELA Quarterly, National Academy of Elder Law Attorneys (Tim presented a revised version of this paper, with forms, at the Cleveland Bar Association's Basics of Elder Law Seminar, Cleveland, Ohio; March 5, 2004)

The Elder-Centered Law Practice: What It Is, How to Attain It
Presented with David L. McGuffey, CELA at the 8th Annual Elder Law Symposium, North Carolina Bar Association, Cary, NC; March 2004

Medicare Secondary Payer Issues
Presented with David L. McGuffey, CELA, to the Nursing Home Litigation Group, American Trial Lawyers Association, Ft. Lauderdale, FL; March 2004

Value-Billing Will Improve Your Bottom Line
Presented to the Annual Conference of the Elder Law and Advocacy Section, State Bar of Michigan, Mackinac Island, MI; September 2003

The Life Care Plan: Integrating a Healthcare-Focused Approach to Meeting the Needs of Your Clients and Families Into Your Elder Law Practice
Presented to the Annual Institute, National Academy of Elder Law Attorneys, Albuquerque, NM; November 2002 (Tim's paper for this presentation was published as the lead article in the Winter 2003 issue of the NAELA Quarterly and the February 2004 issue of The Elder Law Report.)

What Elder Law Attorneys Do: Much More Than Medicaid Planning
Presented to the 17th Annual GCM Conference, National Association of Professional Geriatric Care Managers, Nashville, TN; March 2002

Medicaid, Estate Recovery, and the Ethics of Medicaid Planning
Presented to the Conference on Medical and Legal Ethics, Appalachian School of Law, Grundy, VA; October 1999

Asset or Liability: How Will Your Personal Representative View Your Practice?
Presented with Elder Law attorneys Robert B. Fleming (Tucson, AZ) and Ruth E. Ratzlaff (Fresno, CA), Annual Symposium, National Academy of Elder Law Attorneys, San Diego, CA; May 1999

Publications

Winding Down A Firm Succession occurs when an attorney or firm sells, quits, transfer assets, winds down or when an expected or unexpected death occurs. TBA’s Practice Management Center has expanded resources in the Winding Down A Firm section offering a new tutorial video and a new 48-page handbook thanks to Nashville area lawyer and TBA member Timothy “Tim” Takacs of Takacs McGinnis Elder Care Law. The handbook includes sample language and forms, a planning toolkit and a sample office policy manual for your practice. February 2022

Contributing author of Critical Documents Associated with Aging: An Organizational Guide to Personal Files. Chapter in: Factora RM, ed., *Aging and Money: Reducing the Risk of Financial Exploitation and Protecting Financial Resources*, Humana Press, Springer, New York, c. 2014 ISBN 978-1-4939-1320-6, DOI 10.1007/978-1-4939-1320-6.

Try Your Case vs. Settle Your Case--Either Way, You Can Lose--Or Win, Exceptional Parent (magazine), July 2010.

Revisiting the Ethics of Medicaid Planning, with David L. McGuffey, CELA, NAELA Quarterly, National Academy of Elder Law Attorneys, Summer 2004. (This paper was awarded the NAELA John Regan Writing Award for best article published in the NAELA Quarterly in 2004.)

The Blumberg Election: Going to Court to Increase Medicaid's Spousal Allowances, NAELA Quarterly, National Academy of Elder Law Attorneys, Summer 2003.

Medicaid Planning: Can It Be Justified?, Legal and Ethical Implications of Medicaid Planning, with David L. McGuffey, CELA, 29 William Mitchell Law Review 111 (2002).

Elder Law Practice in Tennessee, LEXIS Law Publishing, 1998, supplemented annually.

Value-Billing: Its Time Has Come (co-authored with Gill E. Wagner). Originally published in the Technolawyer Community on September 11, 1998, this article since has been republished in Law Office Computing, the Massachusetts Bar Weekly, LexisOne, and many other publications, both in print and online.

Properly Drafting Durable Powers of Attorney, Preventive Law Reporter, Vol. 16, No. 2, National Center for Preventive Law, Summer 1997

Health Care Considerations, Special Supplement on Elder Law, 146 New Jersey Law Journal 761 (1996).

The City by the Lake: A History of Hendersonville, Tennessee 1780-1969, Baltimore: Gateway Press, 1992.

Other Activities

President and Board Members, Friends of the Arts and Literature in Sumner, Inc. (FOALS), 2004 to present.

Adjunct Professor, Paralegal Studies Program, Volunteer State Community College, Gallatin, Tennessee, 1996-1997.

County Commissioner, Board of County Commissioners, Sumner County, Tennessee, 1990-1998.