



California NAELA 2026 Summit

San Diego





[Andaz San Diego](#)

April 9-10, 2026



Speakers and Topics

Thursday, April 9

8:30 am		Valerie Peterson - Keynote Speaker - The Wonder (and Future) of Elder Law
9:35 am		Philip Lindsley - SNF Discharges - Top Things Nursing Facilities Don't Want You to Know! Learn Them Anyway to Avoid Discharge and Get Better Results!
10:45 am		Jared Ong - Protecting Elders from Financial Exploitation

1:00 pm		Sam Price - The \$750,000 Question, Is AB 2016 Right for Your Probate Case? Change in California Probate Exemptions Amounts
2:00 pm	 	Justin McDermott and Stuart Zimring - Section 8 Shake-Up: New Housing Rules Every SNT Attorney and Fiduciary Needs to Know
3:30 pm		Melinda Hunsacker - Planning with the New (old) Medi-Cal Asset Test - Year 1

Friday, April 10

9:15 am		Jennifer Scharre - A Year of Bangers in Recent Developments: Capacity, Intestacy, and Standing - Updates in the Law; Cases and Statutes
10:45 am		Greg Broege - Transfer of Real Property - Not Your Typical Transfer Story
1:00 pm to 4:30		UnProgram

UnProgram Event. A collaborative discussion session where attendees rotate among moderator-led topic tables to share strategies, experiences, and practical solutions with colleagues.

This format creates space for real conversation about the issues we're actively

navigating in practice.

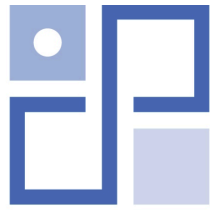
Discussion Topics Include:

- **James Wolverton (True Link)**
How to Manage Assets for a Beneficiary
- **James Morgan (Lanzone Morgan LLP)**
Advising Clients When a Loved One Enters (or Is Already in) a Skilled Nursing Facility
- **Kathleen Day-Seiter**
Funding a Trust with Unique Assets
- **Philip Lindsley**
Medi-Cal Income Rules — and How to Take Advantage of Them



[Watch the Summit Preview](#)

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