



RICHARD A. COURTNEY, CELA*

*Certified Elder Law Attorney by the
National Elder Law Foundation

Firm

FRASCOGNA COURTNEY, PLLC
4400 Old Canton Road, Suite 220
Jackson, Mississippi 39211



Personal



Education

University of Mississippi School of Law
■ J.D., December 1977

Mississippi College

- B.A., with Honors, in English, May 1975
- Sigma Tau Delta, Omicron Delta Kappa Scholastic Honoraries;
- Who's Who Among Students In American Colleges and Universities

Experience

- January 1985/Present -- Partner in law firm of FRASCOGNA COURTNEY, PLLC -- Practice limited to elder law, estate planning, disability law, special needs planning, trusts and trust administration, guardianship and incapacity law, and litigation and advocacy related to these areas
- Spring 2013/Present -- Adjunct Professor of Law at University of Mississippi School of Law – Elder Law
- Fall 1990/Fall 2009 -- Adjunct Professor of Law at Mississippi College School of Law – Pre-trial Litigation (1990-2005) and Elder Law (2007-09)
- August 1986/May 1988 -- Assistant Dean for Professional Services at Mississippi College School of Law -- administrator of Continuing Legal Education program, placement and public information.
- March 1983/December 1984 -- Partner in law firm of WELLS, MOORE, SIMMONS & STUBBLEFIELD -- general civil practice with emphasis in commercial and corporate law, litigation and estate planning.

- January 1978/March 1983 -- Partner in law firm of COURTNEY & COURTNEY -- general civil practice with emphasis in corporate and commercial law, bankruptcy and litigation.
- Fall 1976/Winter 1977 -- Research project director, Mississippi Judicial College, University of Mississippi Law Center.

**Professional
Certifications
and Honors**

Council of Advanced Practitioners, National Academy of Elder Law Attorneys

Certified Elder Law Attorney, as certified by the American Bar Association-accredited National Elder Law Foundation

A/V Pre-eminent Rated by Martindale-Hubbell

Selected as Mid-South Super Lawyer in elder law annually since 2006

Best Lawyers in America® for 2013 - 2015 in Elder Law and Trust and Estates law

Firm listed in *Best Law Firms in America*® for 2014 - 2016 in Elder Law

Mississippi State Bar 2013 Lawyer Citizenship Award

Recipient of 15th Annual Theresa Award by New York-based Theresa Foundation for outstanding services on behalf of persons with disabilities (2009)

Inducted as a Fellow of the Academy, National Academy of Elder Law Attorneys, May 2014

**Professional
Organizations**

American Bar Association

- Member, Probate and Trust Law Section

National Academy of Elder Law Attorneys, Inc.

- Member, Board of Directors (2008-2012)
- Trusts and Special Needs Trusts Section Steering Committee (Chair)
- Special Needs Law Section Steering Committee
- Mississippi Liaison, Public Policy Forum

Fellow, American College of Trust and Estate Counsel

Mississippi State Bar Association

- Estates & Trusts Section, Chair 2006-07

Hinds County Bar Association

- Director, 1986-89
- Public Relations Chairman, 1987-88

Jackson Young Lawyers Association

- President, 1985-86
- Vice President, 1984-85
- Treasurer, 1983-84

Mississippi Pro Bono Project

- Exceptional Service Award, 1986

Mississippi Council of Advisors In Occupational Therapy

- Member, 2002-2007

Special Needs Alliance, Inc.

- Manager, 2002-2004
- Member, Board of Directors (2009-2012)
- Vice President, 2012-2013
- President-Elect, 2013-14
- President, 2014-15

Civic Organizations

- The Mustard Seed, Inc.
Member, Board of Directors, 2009 - 2012
- Cerebral Palsy Foundation of Mississippi, Inc.
President, Board of Directors, 1987-1996
Member, Board of Directors, 1996-present
- Heritage School for Learning Disabilities
President, Board of Directors, 1987-1988
- City of Jackson Planning and Zoning Board Member, 1990-1992
Chairman, Zoning Hearing Committee, 1991-1992
- Mississippi Baptist Convention Board
Member, Committee on Constitution and Bylaws, 2001-2003,
2004-2006
- Hospice Ministries, Inc.
President, Advisory Board, 2004-2007

Professional Presentations

- "Effective Motion Practice in Mississippi"; Lorman Education Services, Jackson, Mississippi, November 8, 1991
- "Impact of The Americans With Disabilities Act on Banks"; Mississippi Bankers Association Seminar; Jackson, Mississippi; February 5, 1992
- "The Americans With Disabilities Act: What Every Lawyer Should Know"; Mississippi College School of Law, Jackson, Mississippi, May 14, 1992
- "Collecting Judgments in Mississippi"; National Business Institute, Inc., Jackson, Mississippi, June 25, 1992
- "Administration of Estates in Mississippi"; National Business Institute, Inc., Jackson, Mississippi, May 18, 1993

- “Trust and Asset Protection Alternatives in Mississippi”; National Business Institute, Inc., Jackson, Mississippi, April 25, 2000 (faculty speaker)
- “Futures Planning & Achieving Eligibility for Services”; First Annual Person-Centered Planning Conference, Hattiesburg, Mississippi, November 15 & 16, 2000
- “Mississippi Elder Law”; National Business Institute, Inc., Jackson, Mississippi, January 16, 2001 (faculty speaker)
- “Legal Planning Needs of the Growing Elderly Population”; Metro Legal Professionals Association, Jackson, Mississippi, November 27, 2001
- “Future’s Planning and Achieving Eligibility for Services: Dealing with Medicaid and Social Security”; 2nd Annual Person-Centered Planning Conference, University of Southern Mississippi Conference Center, Long Beach, Mississippi, February 13, 2002.
- “The Probate Process From Start to Finish”; National Business Institute, Jackson, Mississippi, July 29, 2002 (faculty speaker).
- “Best Health-Care and Financial Advice for Seniors and Their Families”; Third Annual Conference on Alzheimer’s Disease and Psychiatric Disorders in the Elderly, sponsored by the Mississippi Department of Mental Health, Biloxi, Mississippi, August 9, 2002.
- “Special Needs Trusts: Does Your Client Need One?”; Mississippi Association of Legal Assistants, Inc. 2002 Fall Seminar, Jackson, Mississippi, September 26, 2002.
- “Maximizing Financial Resources for Persons with Disabilities”; A Celebration of Achievement Conference, Mississippi Department of Rehabilitation Services; Mississippi Trade Mart, Jackson, Mississippi, May 20, 2003
- Southern Farm Bureau Insurance Company Advanced Sales Representatives’ Meeting, Jackson Hilton, Jackson, Mississippi, September 9, 2003
- “Special Needs Legal Planning for Persons with Brain Injuries”; Second Annual Brain Injury Conference, New Orleans, Louisiana, October 3, 2003
- “Traversing the Trustee Terrain: Fiduciary Duties Revisited”; National Academy of Elder Law Attorneys Advanced Institute, Dallas, Texas, November 15, 2003
- Medical Needs Trusts and Workers’ Compensation Cases; Mississippi Trial Lawyers Association Seminar, Jackson, Mississippi, April 23, 2004

- Advanced Sales Representatives' Meeting: Elder Care and Estate Planning Today; Southern Farm Bureau Life Insurance Company, Jackson, Mississippi, May 6, 2004
- "How to Draft Wills and Trusts in Mississippi"; National Business Institute; Jackson, Mississippi, July 13, 2004 (faculty speaker).
- "Medicaid & Medicaid Planning in Mississippi: Understanding and Working with Institutional Medicaid for the Elderly in an Era of Constantly Shrinking Benefits"; Medical Educational Services, Inc. Professional Development Network; Jackson, Mississippi, July 21, 2004
- "Mental Illness Across the Life Span – The Continuum of Care"; Continuing Education in Nursing; The University of Mississippi School of Nursing, the University Hospitals and Clinics Department of Nursing Service, and the University of Mississippi Medical Center Division of Continuing Health Professional Education; Jackson, Mississippi, August 13, 2004
- "Estate Planning"; LIFE/Mississippi Paralysis Association Annual Conference, Jackson, Mississippi, October 1, 2004
- 2005 Elder Law Seminar – "Medicaid and the Border States: Florida, Georgia, Mississippi and Tennessee"; Elder Law Section of the Alabama State Bar, The University of Alabama School of Law, Tuscaloosa, Alabama, February 18, 2005
- "Effective Planning for Seniors and Their Families", Jackson Association of Insurance and Financial Administrators Annual Conference, Jackson, Mississippi, March 11, 2005
- "Mississippi Elder Care Planning: How to Protect Assets and Provide for Services"; National Business Institute, Jackson, Mississippi, March 16, 2005 (faculty speaker)
- "Special Needs Trusts in Mississippi: Planning for the Disabled and Elderly"; Lorman Education Services, Jackson, Mississippi, May 17, 2005
- "Ethical Issues in Dealing With Older Clients"; NALS, Inc. Region 6 Conference, Natchez, Mississippi, July 30, 2005.
- "Medicaid Rules and Issues From the Client's Perspective"; North Mississippi Rural Legal Services 2005 Elder Law Conference, University of Mississippi, August 5, 2005.
- "Planning Essentials for Families Dealing With Dementia"; Sixth Annual Conference on Alzheimer's Disease and Psychiatric Disorders in the Elderly, sponsored by the Mississippi Department of Mental Health, Philadelphia, Mississippi, August 11, 2005

- “2006 Elder Law Issues”; Jackson Association of Health Underwriters Annual Conference, January 26, 2006
- “Medicaid and Elder Law Issues in Mississippi”; Lorman Education Services, Jackson, Mississippi, March 14, 2006
- “Special Needs Planning for Brain Injury Survivors”; Mississippi Protection and Advocacy Services and MILES Corporation Brain Injury Conference, Jackson, Mississippi, April 25, 2006
- “The New Medicaid Rules and Planning for Families Dealing with Dementia”; Mississippi Financial Planning Association Annual Symposium, Jackson, Mississippi, May 3, 2006
- “The New Medicaid Rules and Estate Planning Options for Seniors”; Mississippi Bar Association Estates & Trusts Section Annual Meeting, Sandestin, Florida, July 7, 2006
- “Special Needs Trusts, Including Court-Ordered Trusts”; Barristers Educational Services, Jackson, Mississippi, July 14, 2006
- “Medicaid Issues from the Client’s Perspective: Transfer, Trust and Estate Recovery Rules”; North Mississippi Rural Legal Services 2006 Elder Law Conference, Oxford, Mississippi, August 4, 2006
- “Medicaid and Medicaid Planning in Mississippi: Understanding and Working With Institutional Medicaid Under the Deficit Reduction Act of 2005”; Medical Education Services – Professional Development Network, Jackson, Mississippi, August 25, 2006
- “The New Medicaid Rules Under the Deficit Reduction Act of 2005”; Mississippi Estate Planning Council, Jackson, Mississippi, November 14, 2006
- “A Total Package: The Fusion of Social Work and Legal Planning for Special Needs Families”; Mississippi Chapter National Association of Social Workers Annual Conference, Jackson, Mississippi, March 9, 2007
- “Estate Planning Basics for Special Needs Families”; JSU Annual Mental Health Research Conference, Jackson, Mississippi, April 18, 2007
- “Best Healthcare and Legal Advice for Seniors and Their Families”; Mississippi Southern Senior & Family Resources Conference, Southaven, Mississippi, May 18, 2007 (full day speaker)
- “Elder Law Issues in Mississippi”; National Business Institute, Jackson, Mississippi, June 4, 2007 (Asset Protection for Older Adults)
- “Building a Team of Heroes: The Fusion of Elder Law and Financial Services”; Focus Session Speaker, Million Dollar Round Table

Annual Meeting, Denver, Colorado, June 11, 2007 (Deficit Reduction Act of 2005 and Medicaid Annuity Provisions)

- “Medicaid Rules and Issues from the Client’s Perspective”; North Mississippi Rural Legal Services 2007 Elder Law Conference, Oxford, Mississippi, August 10, 2007
- “Current Legal and Healthcare Planning for Families Dealing with Dementia”; Mississippi Department of Mental Health 8th Annual Conference on Alzheimer’s Disease and Psychiatric Disorders in the Elderly, Choctaw, Mississippi, August 29, 2007
- “Medicaid and Medicaid Planning in Mississippi: Understanding and Working With Institutional Medicaid for the Elderly”; Medical Education Services – Professional Development Network, Jackson, Mississippi, September 20, 2007
- “Guiding Patients and Their Families to Effective Decision-making”; University of Mississippi Medical Center Social Work Department In-Service; Jackson, Mississippi, December 6, 2007
- “Special Needs Trusts: Does Your Client Need One?”; Mississippi Association for Justice Lunch and Learn, Oxford, Mississippi, December 11, 2007
- “Special Needs Trusts: Planning for the Disabled and Elderly in Mississippi”; Lorman Education Services, Jackson, Mississippi, April 11, 2008
- “Essential Estate, Financial and Health-care Planning for Seniors (and their Caregivers)”; Mississippi Independent Nursing Home Association Annual Conference, Biloxi, Mississippi, May 29, 2008
- “Special Needs Planning for Financial and Healthcare Security”; North Mississippi Mental Health Community Conference, Oxford, Mississippi, June 5, 2008
- “Resolving Legal and Financial Issues in Elder Care”; National Business Institute, Jackson, Mississippi, June 6, 2008 (Asset Protection for Older Adults; Long-term Care Insurance)
- “Care Management, Special Needs Planning and Medicaid Update”; North Mississippi Rural Legal Services 2008 Elder Law Conference, Oxford, Mississippi, August 8, 2008
- “Special Needs Legal Planning for Persons with Special Needs”; Jackson Association of Insurance and Financial Advisors, Jackson, Mississippi, September 12, 2008
- “Elder Law in Action: Holistic Planning for the Elderly Client and Family”; University of Mississippi Medical Center School of Nursing, Geriatric Nursing Conference, Jackson, Mississippi, September 18, 2008 (Asset Protection for Older Adults)

- “Effective Decision-making and Related Ethical Issues”; Jaquith Nursing Home, *Jaquith University*, Whitfield, Mississippi, September 19, 2008
- “Special Needs Planning and Care Management for Trustees”; Mississippi Bankers Association Financial Management Conference, Jackson, Mississippi, November 6, 2008
- “Yes, You Can! – A Positive Approach to Lawyering”; Mississippi State Bar Women Lawyers Division, 2009 Gandy Lecture Series, Oxford, Mississippi, February 21, 2009
- “Essential Planning for Seniors and Their Families”; Association of Baptist Ministries to the Aging Annual Conference, Jackson, Mississippi, February 23, 2009
- “Service and Emotional Support Animals as a Reasonable Accommodation”; *Providing Persons with Disabilities and the Elderly Equal Access to Justice*, American Bar Association and Stetson University College of Law, Gulfport, Florida, May 18, 2009
- “Special Needs Planning for Financial and Healthcare Security”; Financial Planning Association, Mississippi Chapter, Jackson, Mississippi June 4, 2009
- “Effective Use of Trusts”; University of Mississippi 2009 CLE Toolbox Series, Ridgeland, Mississippi, June 19, 2009
- “You Be the Judge: Family Dynamics, Ethical Issues and Life Care Planning for Older Adults”; Mississippi Bar Association 2009 Summer School for Lawyers, Sandestin, Florida, July 14, 2009
- “Effective Financial and Health-care Decision-making”; Mississippi Society of CPAs monthly meeting, Jackson, Mississippi, November 19, 2009
- “Medicaid and SSI Update”; North Mississippi Rural Legal Services Annual Elder Law Conference, Oxford, Mississippi, August 7, 2009
- “Can My Special Needs Trust Buy Me a Dog?”; Stetson University School of Law 2009 Special Needs Trust National Conference, St. Petersburg, Florida, October 16, 2009
- “Care Management in Guardianship and Special Needs Trust Practices”; National Academy of Elder Law Attorneys National Telephonic CLE, October 21, 2009
- “Reverse Mortgages and Medicaid Update”; Mississippi Estate Planning Council monthly meeting, Jackson, Mississippi, March 9, 2010
- “Intersection of Family Law and Elder Law”; Fourteenth Annual Bell Family Law CLE, Oxford, Mississippi (May 7, 2010) and Biloxi, Mississippi (May 21, 2010)

- “Dealing with Fighting Families; Ethnic and Racial Diversity in Elder Care”; 11th Annual Conference on Alzheimer’s Disease and Psychiatric Disorders in the Elderly, Mississippi Department of Mental Health Division of Alzheimer’s Disease and Other Dementia, Olive Branch, Mississippi, May 18, 2010
- “Yes, You Can! Positive Solutions for Older Adults and Persons with Disabilities” and “How Healthcare Reform is Affecting Medicare and Medicaid”; 2010 Annual North Mississippi Rural Legal Services Elder Law Conference, Oxford, Mississippi, August 6, 2010
- “Legal Tools for Adult Protection and Dealing with Fighting Families”; 2010 Division of Aging and Adult Services, Adult Protective Services Program Staff Training, Jackson, Mississippi, September 29 and October 12, 2010
- “Essential Planning Documents for All Situations”; Mississippi Women Lawyers Association Seminar, Jackson, Mississippi, January 5, 2011
- “Qualifying for Medicaid Long-term Care Programs” and “Preserving Family Assets While Qualifying for Medicaid”; Resolving Legal and Financial Issues in Elder Care; National Business Institute, Jackson, Mississippi, January 31, 2011
- “Ethical Issues and Cultural Diversity in Elder Law” and “Elder Law, Incapacity Planning, Special Needs Planning and Estate Recovery”; 2011 Annual PDD Conference; Mississippi Association of Planning and Development Districts, Beau Rivage Resort, Biloxi, Mississippi, April 27, 2011
- “The Intersection of Public Benefits and Chancery Practice”; Mississippi Judicial College, Conference of Mississippi Chancery Court Judges; Jackson, Mississippi, April 29, 2011
- “Update on Health Care Reform: Nailing Jell-O to a Tree”; North Mississippi Rural Legal Services 2011 Elder Law Conference; Oxford, Mississippi, August 5, 2011
- “Protecting Vulnerable Persons from Creditors and Predators”; Mississippi Department of Human Services, In-Service Training for Adult Protective Services Workers, Jackson, Mississippi, October 11, 2011
- WSNT Talk Radio: Family Conversations, 2011 Stetson Special Needs Trust National Conference, St. Pete Beach, Florida, October 20, 2011
- “Overview of (Those Confusing) Public Benefits - Social Security, SS Disability, SSI, Medicaid and Medicare”; Mississippi Financial Planning Association, Jackson, Mississippi, December 7, 2011

- “Incapacity, Conservatorship and Medicaid Update”; Social Work/Case Manager Continuing Education Series, University of Mississippi Medical Center, Jackson, Mississippi, December 8, 2011
- “Special Needs Trust Planning”; Mississippi Society of CPAs Central Chapter, Jackson, Mississippi, January 19, 2012
- “Medicare, Medicare Appeals, Veterans’ Benefits and Long-Term Care Insurance”; NBI *Medicaid Update 2012* Continuing Legal Education Seminar, Jackson, Mississippi, March 15, 2012
- “Update on Health Care Reform: Nailing Jell-o to a Tree”; National Association of Social Workers Mississippi Chapter Annual Conference, Natchez, Mississippi, March 22, 2012
- “Protecting Rights and Resources of Vulnerable Adults”; National Association of Social Workers Mississippi Chapter Annual Conference, Natchez, Mississippi March 23, 2012
- “The Human and Compassionate Side of Estate Planning”; Mississippi State Bar, Estate & Trusts Section Annual Meeting, Sandestin, Florida, July 13, 2012
- “The Intersection of Special Needs Trusts and Public Benefits”; North Mississippi Rural Legal Services Elder Law Conference, University, Mississippi, August 10, 2012
- “Elder Law and Medicaid Planning Update”; Mississippi Financial Planning Association, Jackson, Mississippi, October 3, 2012
- “Update on the Health Care Reform Law.” Mississippi Physicians’ Conference, Division of Alzheimer’s Disease, Mississippi Dept. of Mental Health, Flowood, Mississippi, February 1, 2013.
- “The 31 Flavors of Social Security Benefits and Their Effects on Retirement Security.” Mississippi Estate Planning Council, Jackson, Mississippi, February 12, 2013.
- “Planning Your Legacy”. 20th Annual Evelyn Gandy Lecture Series, Mississippi State Bar Women in the Profession, Jackson, Mississippi, February 22, 2013.
- “Medicaid and Medicare Update” and “Dealing with Dysfunctional and Divided Families.” National Association of Social Worker, Mississippi Chapter Annual Conference, Natchez, Mississippi, March 21-22, 2013.
- “The Human and Compassionate Side of Estate Planning.” Regional Meeting of American College of Trust and Estate Council, Jackson, Mississippi, April 19, 2013.
- “Medicare and Medicaid in the Midst of Health Care Reform”; North Mississippi Rural Legal Services Elder Law Conference, University, Mississippi, August 9, 2013

- “Updating Health Care Reform: Nailing Jell-O to a Tree”; 14th Annual Conference on Alzheimer’s Disease and Psychiatric Disorders in the Elderly, Mississippi Department of Mental Health Division of Alzheimer’s Disease and Other Dementia, Meridian, Mississippi, August 14, 2013
- “Legal Issues in the Aging Population”; North Mississippi Medical Center Aging Symposium, Tupelo, Mississippi, September 20, 2013
- “Medicaid, Medicare and Social Security Update”; National Business Institute (NBI), Jackson, Mississippi, December 6, 2013
- “Medicaid and Health Care Reform”; Mississippi Estate Planning Council, Jackson, Mississippi, February 11, 2014
- “Estate Planning for the Long Term” and “Intersection of Special Needs Trusts and Chancery Practice”; Mississippi Judicial College Chancery Court Clerks Annual Conference, Jackson, Mississippi, February 12, 2014.
- “Intergenerational Finances: Protecting our Children and Families”; Mississippi Child Welfare Institute Conference (Twelfth Annual), Jackson, Mississippi, February 14, 2014.
- “Protecting Vulnerable Adults from Abuse and Exploitation”; Mississippi Coalition Against Domestic Violence Seminar, Jackson, Mississippi, March 6, 2014.
- "Elder Care for Financial Professionals"; National Association of Insurance and Financial Advisors (NAIFA); Jackson, Mississippi; March 13, 2014.
- “Effective Financial and Health-care Decision-making for Older Adults”; 2014 Central Mississippi Social Work Conference; Brandon, Mississippi; March 21, 2014.
- "Medicaid for the Ages: Who, What, When and How"; National Association of Social Workers MS Chapter 2014 Annual Conference; Biloxi, Mississippi; March 27, 2014.
- "Special Needs Counseling"; National Academy of Elder Law Attorneys 2014 Annual Advanced Elder Law Review Course; Scottsdale, Arizona; May 14, 2014.
- “Elder Law: Doing Well by Doing Good”; Lauderdale County Bar Association; Meridian, Mississippi; July 25, 2014.
- “Effective Financial and Healthcare Decision-making”; Mississippi Department of Human Services, Division of Aging and Adult Services State Conference; Jackson, Mississippi; July 30, 2014.

- "Update on Access to Health Care in Mississippi"; North Mississippi Rural Legal Services Annual Elder Law Conference; Oxford, Mississippi; August 1, 2014.
- "Special Needs Planning for Persons with Disabilities"; Rehabilitation Association of Mississippi Annual Conference; Jackson, Mississippi; August 28, 2014.
- "Effective Financial and Healthcare Decision-making for Vulnerable Adults"; Mississippi Department of Human Services, Division of Aging and Adult Services Senior Safety and Protection Training Conference; Jackson, Mississippi; September 5, 2014.
- "Update on Health Care Reform"; 2014 Mississippi Department of Mental Health Conference on Social Welfare, Philadelphia, Mississippi; September 25, 2014.
- "End-of-Life Decisions: Legal Issues for Chancery Judges"; Mississippi Judicial College, Annual Chancery Court Judges Conference; Jackson, Mississippi; October 24, 2014.
- "Special Needs Counseling"; National Academy of Elder Law Attorneys 2015 Annual Advanced Elder Law Review Course; Newport, California; January 28, 2015.
- "Planning for YOUR Sixties"; National Association of Social Workers MS Chapter 2015 Annual Conference; Biloxi, Mississippi; March 26, 2015.
- "Planning for Long Term Care"; National Business Institute (NBI) Legal Seminar, Jackson, Mississippi, April 21, 2015
- Panelist, Mississippi Department of Health Alzheimer's Medical Conference; Jackson, Mississippi, May 19, 2015
- "The New ABLE Act and Special Needs Trusts for Persons with Disabilities"; Mississippi Annual disability Megaconference, Jackson, Mississippi, June 19, 2015
- "Protecting Rights and Resources of Vulnerable Adults"; North Mississippi Rural Legal Services Annual Elder Law Conference; Oxford, Mississippi; August 7, 2015.
- "Dealing with Dys/funk/shun'l and Di-vi-ded Families"; NAELA Council of Advanced Practitioners Annual Conference; Jackson Hole, Wyoming; August 14, 2014.

**Civic and
Community
Presentations**

- “Maximizing Financial Resources for Persons With Disabilities”; Third Annual Conference of the Cerebral Palsy Foundation of Mississippi, Inc., Jackson, Mississippi, April 17, 1999
- “Essential Estate Planning for Seniors and Their Families”; Guest Speaker, Baptist Health Systems Arthritis Lecture Series, Baptist Healthplex, Jackson, Mississippi, January 10, 2000
- “Planning Essentials for Special Needs Families”; Fourth Annual Conference of the Cerebral Palsy Foundation of Mississippi, Inc., Biloxi, Mississippi, April 1, 2000
- “Planning Essentials for Seniors”; Edward Jones Investments Estate Planning Workshop, Jackson, Mississippi, September 20, 2000.
- Guest lecturer, Social and Mental Health of the Aging Class, Tougaloo College, February 2001
- “Securing the Future: Legal and Financial Issues”; Guest Lecturer, Annual Baptist Adult Day Health Services Caregiver Conference, Jackson, Mississippi, April 7, 2001
- “Estate Planning for Special Needs Families”; Guest Lecturer, 11th Annual Mental Health Community Conference, Jackson, Mississippi, May 23, 2001
- “Planning Essentials for Special Needs Families”; Pine Belt Mental Healthcare Resources Conference, Hattiesburg, Mississippi, January 16, 2002
- Mississippi Department of Mental Health Division of Alzheimers and Other Dementia Caregiver’s Workshop, Greenwood, Mississippi, November 5, 2002.
- Mississippi Department of Mental Health Division of Alzheimers and Other Dementia Caregiver’s Workshop, Meridian, Mississippi, November 15, 2002.
- “Planning Essentials for Seniors (and their Families)”; First Baptist Church of Florence, Mississippi Senior Adult Group, January 9, 2003.
- “Planning Essentials for Seniors (and their Families)”; Ridgeland Point Retirement Center, February 6, 2003.
- “Five Common Misconceptions for Seniors”; Alpha Delta Kappa Retired Teachers Meeting, Municipal Art Gallery, Jackson, Mississippi, February 20, 2003.
- “Planning Essentials for Seniors (and their Families)”; Van Winkle United Methodist Church Senior Adult Group, Jackson, Mississippi, March 18, 2003.

- “Five Common Misconceptions for Seniors”; Senior Plus Luncheon, Rankin Medical Center, Brandon, Mississippi, March 26, 2003.
- “Yes, You Can! – Some Good News for Some Vexing Problems”; University Medical Center Geriatric Caregivers Support Group, UMC Pavilion, Jackson, Mississippi, May 19, 2003
- “Planning Essentials for Senior Adults (and Their Families)”, Delta Kappa Gamma District Conference, Trace Pointe Retirement Center, Clinton, Mississippi, January 8, 2005
- “Special Needs Planning for Families With Mental Illness”, National Alliance for the Mentally Ill Support/Affiliate Group, Jackson Mental Health Center, Jackson, Mississippi, January 13, 2005
- “Estate and Life Care Planning for Special Needs Families”; Central Mississippi Down Syndrome Society, Learning Series Seminar, Baptist Healthplex, Clinton, Mississippi, February 17, 2007
- “Essential Legal Planning for Families Dealing with Dementia”; Broadmoor Baptist Church Alzheimer’s Support Group, Madison, Mississippi, February 5 and March 5, 2007
- “Essential Legal Planning for Older Adults and Their Families”; Parkway Hills United Methodist Church, Madison, Mississippi, April 18, 2007
- “Effective Decision-making for Residents and Their Families”; Trace Pointe Assisted Living Family In-Service, Clinton, Mississippi, December 11, 2007
- “Essential Legal Tips for Growing Older Gracefully”; Greater Jackson Community Foundation, Jackson, Mississippi, February 14, 2008
- “Effective Financial and Healthcare Decision-making”; Southern Farm Bureau Lunch ‘n Learn, Jackson, Mississippi, January 5, 2010
- “Special Needs Trusts, Wills and Powers of Attorney”; Family 2 Family and Special Kids Family Network, University of Southern Mississippi Institute for Disability Studies, Hattiesburg, Mississippi, May 18, 2010
- “Estate Planning and Special Needs Trusts”; Central Mississippi Down Syndrome Society Educational Conference, Baptist Healthplex, Clinton, Mississippi, January 22, 2011
- Jackson Public Schools – Office of Exceptional Education Services
Special Needs Planning for Children with Disabilities, 2011
- “Estate Planning Essentials: The Basics – Plus Some!”; Ridgeland Senior Services Fifties Plus, Ridgeland, Mississippi; September 1, 2011

- Coalition for Citizens with Disabilities Parent Training & Information Center 2011 – “Imagine” Conference – Inclusion Through The Lifespan – Hilton Hotel, Jackson, Mississippi; October 13-14, 2011
- Alzheimer’s Association “Strengthening Our Community’s Circle of Care” Conference Panelist, November 16, 2011
- “Essential Estate Planning and Long-term Care Planning”; Mississippi Methodist Senior Services Community Conferences, Jackson, Mississippi and Hattiesburg, Mississippi, May 3 and 4, 2012
- “Planning Essentials for Families Dealing with Dementia”; Mississippi Alzheimer’s Association Central Mississippi, Ridgeland, Mississippi, September 19, 2012
- Speaker to Anderson Hospital Alzheimer’s Support Group, Meridian, Mississippi, September 25, 2012.
- Panelist for Central Mississippi Alzheimer’s Association Meridian Caregiver Conference, on “Legal and Financial Issues for Caregivers.” Mississippi State University, Kahlmus Auditorium, Meridian, Mississippi, October 9, 2012.
- “Legal and Financial Issues for Caregivers.” Central Mississippi Alzheimer’s Association Jackson Caregiver Conference, Mississippi College, Clinton, MS, November 13, 2012.
- “Planning Essentials for Special Needs Families.” Central Mississippi Down Syndrome Society Family Conference, Jackson, Mississippi, February 9, 2013.
- “Planning for the Elderly and Disabled.” Northeast Mississippi Financial Planning Association Luncheon, Tupelo, Mississippi, February 13, 2013.
- “Essential Legal and Financial Planning for Families Dealing with Dementia.” Alzheimer’s Caregivers’ Conference sponsored by William Carey University and Mississippi Gerontological Society, Hattiesburg, Mississippi; March 15, 2013.
- “Estate Planning Essentials: The Basics - Plus Some!” Presentation to Chief Red Jacket Chapter, DAR, Brandon, Mississippi, April 6, 2013.
- “Who Decides/Planning Ahead: Legal and Financial Planning for Older Adults Who Can No Longer Care for Themselves.” 4th Annual Northeast Mississippi Alzheimer’s Conference sponsored by Itawamba Community College and Mississippi Alzheimer’s Association, Tupelo, Mississippi; May 9, 2013.
- “Essential Legal and Financial Planning for Dealing with Dementia.” Alzheimer’s Association of Mississippi Caregivers Workshop, St. Dominic/New Directions, Jackson, Mississippi, May 16, 2013.

- “Special Needs Planning for Persons With Disabilities and Their Families.” 2nd Annual Mississippi disAbility MegaConference, Jackson, Mississippi; June 20, 2013.
- “Legal and Financial Planning for Families Dealing with Dementia”; First Baptist Church Jackson Annual Caregivers’ Conference, Jackson, Mississippi, October 24, 2014.
- “Dealing With and Planning For Dementia”; St. Dominic/New Directions Alzheimer’s Support Group, St. Dominic Health Center, Jackson, Mississippi, October 28, 2013.
- “Myths of Medicaid”; Jackson Area Alzheimer’s Conference, Mississippi College, Clinton, Mississippi, November 8, 2013.
- “Planning Essentials for Families of Persons with Disabilities”; Gulf Coast Down Syndrome Society Support Group and Community Conference, Kroc Center, Biloxi, Mississippi, November 14, 2013.
- "Planning for Family Members with Dementia"; Noxubee County Alzheimer’s Support Group; Macon, Mississippi, March 15, 2014
- "Caregiving and Asset Protection Planning"; Cleveland Women’s Conference; Cleveland, Mississippi, May 27, 2014
- "Planning to Avoid Financial Fraud and Exploitation"; Panelist, Central Mississippi Area Agency on Aging Scam/Jam Conference; Jackson, Mississippi, May 28, 2014
- "Asset Protection and Long-term Care Planning"; St. Catherine’s Village; Madison, Mississippi, October 23, 2014
- "Caregiving and Asset Protection Planning"; Anderson Hospital Alzheimer’s Support Group; Meridian, Mississippi, October 28, 2014
- "Asset Protection and Long-term Care Planning"; Indian Senior Network; Brandon, Mississippi, January 24, 2015

Articles

- Richard A. Courtney, No Planning is Bad Planning, Metro Business Rev. 29 (April, 1999).
- Richard A. Courtney, Treatment of Trusts Under FCIA '99, Mississippi Bar Association Estates and Trusts Section Newsletter (Spring, 2001).
- Richard A. Courtney, Heroism or Malpractice – Using Special Needs Trusts to Save Medicaid Benefits in Personal Injury Settlements, *Voir Dire* Magazine (Fall 2001).

- Richard A. Courtney, Pedestals and Pitfalls: Litigation Settlements and Public Benefits Update, *Voir Dire Magazine* (Spring 2003).
- Richard A. Courtney, Tax Basics for Families with Special Needs, *Exceptional Parent Magazine* (March 2004).
- Richard A. Courtney, Special Needs Planning For Special Family Situations, *The Mississippi Lawyer Magazine* (May-June 2004).
- Richard A. Courtney, Getting It All Together: Essential Legal and Financial Planning for Children with Special Needs, *Exceptional Parent Magazine* feature article (November 2005).
- Richard A. Courtney, Is Your Trustee Up For the Job?, *Exceptional Parent Magazine* (March 2006).
- Richard A. Courtney, Essential Planning Guide for Families Dealing with Dementia, (2006-14) (55-page planning guide produced for Mississippi Department of Mental Health-Division of Alzheimer's and Other Dementia, Annual Conference 2006-14).
- Richard A. Courtney, A Good Half-Dozen Caregiving Provisions for Special Needs Trusts, *NAELA News*, National Academy of Elder Law Attorneys, Vol. 24, Issue 6 (December 2012).
- Richard A. Courtney, Planning Your Legacy, *The Mississippi Lawyer Magazine*, (May-June 2013).

Committee on Energy and Commerce
U.S. House of Representatives
Witness Disclosure Requirement - "Truth in Testimony"
Required by House Rule XI, Clause 2(g)(5)

1. Your Name: Richard A. Courtney		
2. Your Title: President, Special Needs Alliance and Certified Elder Law Attorney		
3. The Entity(ies) You are Representing: Special Needs Alliance and National Academy of Elder Law Attorneys		
4. Are you testifying on behalf of the Federal, or a State or local government entity?	Yes	No X
5. Please list any Federal grants or contracts, or contracts or payments originating with a foreign government, that you or the entity(ies) you represent have received on or after January 1, 2013. Only grants, contracts, or payments related to the subject matter of the hearing must be listed. NONE		
6. Please attach your curriculum vitae to your completed disclosure form.		

Signature: 

Date: 9-16-15