

DAVID A. LIPSCHUTZ
Center for Medicare Advocacy, Inc.
Washington, D.C.

BAR MEMBERSHIP

California - #203212 – December 1999
Connecticut - #432427 – June 2011

EDUCATION

University of California, Davis, School of Law – Juris Doctor, May 1999
University of California, Santa Cruz – Bachelor of Arts in Politics, June 1993

EXPERIENCE

Center for Medicare Advocacy, Inc. – June 2010 - Present

Co-Director, Law & Policy/Attorney – July 2024 – Present – Washington, DC

With Co-Director, provides general leadership and management of organization, including oversight of staff, liaison with Board of Directors, financial management, development, vision and partnership building; oversees the organization's legal work, and communications; serves as primary spokesperson for the organization; engages in policy work outlined under Senior Policy Attorney, below.

Associate Director/Senior Policy Attorney – July 2011 – June 2024 – Washington, DC

Engage in public policy issues surrounding Medicare and related coverage as they impact Medicare beneficiaries; federal administrative and legislative advocacy; collaboration with other consumer advocates to address systemic issues; monitor, analyze and comment on current Medicare-related policy developments; provide technical assistance to Medicare beneficiaries and other advocates nationwide; conduct trainings for professionals/practitioners; draft and edit various Center publications; management of office. (Promoted from Policy Attorney to Senior Policy Attorney in May 2014, to Managing Attorney in July 2015, and to Associate Director in December 2018.)

Attorney/Advocate – June 2010 – June 2011 – Mansfield, Connecticut

Provided direct assistance on behalf of Medicare beneficiaries at all stages of the administrative appeals process; assisted with the Center's federal and state legislative and administrative efforts; responded to inquiries from Medicare beneficiaries, administrators, service and health care providers, advocates and others.

California Health Advocates – Los Angeles, California

Staff Attorney – February 2005 – May 2010

Engaged in public policy issues surrounding Medicare and related coverage issues as they impacted California Medicare beneficiaries; these activities included: administrative advocacy before state and federal agencies; collaborating with other consumer advocates to address systemic Medicare and Medi-Cal (Medicaid) issues; monitoring, analyzing and summarizing current Medicare and related policy developments; developing educational material and conducting professional trainings; drafting policy-oriented issue briefs; providing technical assistance to state network of Health Insurance Counseling and Advocacy (HICAP) programs and other beneficiary-focused groups.

Interim President/Chief Executive Officer – January 2008 – October 2008

Served, on an interim basis and concurrent with duties as agency Staff Attorney, as chief administrative officer for agency Board of Directors; oversight of internal operations, including: Board administration and support; program, product and service delivery; financial, tax, risk and facilities management;

human resources management; communications and public relations; met with funders; and oversaw fund development efforts.

Center for Health Care Rights – Los Angeles, California – December 2000 – February 2005

Staff Attorney – Provided legal support, technical assistance and case supervision to Medicare advocacy agency's direct service staff who carried a cumulative caseload of approximately 400 cases; provided training and legal support to network of volunteer counselors; represented individual clients in Medicare appeal cases (including Administrative Law Judge hearings); participated in client telephone intake process; conducted community education and media activities to train professionals and beneficiaries on Medicare consumer rights issues; engaged in administrative advocacy before state and federal agencies; monitored, analyzed and summarized current Medicare and Medicare managed care developments, including new regulations and policies; monitored cases to identify beneficiaries' problems susceptible to systemic advocacy; collaborated with other consumer advocates on Medicare and Medi-Cal issues; member of agency senior management team.

Legal Services of Northern California – Sacramento, California – October 1999 – October 2000

Staff Attorney – Disability and Employment Rights Advocacy Program – April 2000 – October 2000

Provided advocacy for persons with disabilities to enforce rights to vocational rehabilitation services from the California Department of Rehabilitation. Conducted intake, evaluated cases, negotiated with Department staff, provided assistance to persons seeking information regarding employment rights under the Americans with Disabilities Act, provided representation on petitions for writ of mandate, including drafting briefs and appearing at writ hearings.

Staff Attorney – Boys & Girls Club Project – October 1999 – October 2000

Responsible for implementing project-based partnership between Legal Services and local Boys & Girls Club. Assisted Club members and their parents with legal issues, including public benefits, housing, health, education and employment; taught teenage Club members about their legal rights and responsibilities through Street Law class, field trips, individual and group discussions; coached teens participating in Sacramento County Youth Peer Court program; organized and conducted legal clinics for parents of Club members.

PUBLICATIONS

Medicare Handbook (Published by Wolters Kluwer) 2012 through 2025 editions (2026 edition pending) – contributing author to several chapters on Medicare Advantage, Part D, and other insurance issues

David A. Lipschutz, "The Regulation of Medicare Advantage Plans' Prior Authorization Procedures and the Use of AI and Algorithms" NAELA News July/August/September 2025
https://www.naela.org/NewsJournalOnline/News_Articles/2025/JulAugSep2025/Medicare-Advantage-Prior-Authorization-AI-Algorithms.aspx?subid=2969

David A. Lipschutz, "Recent Pro-Beneficiary Changes to Medicare Policy" NAELA News April/May/June 2024
https://naela.org/NewsJournalOnline/News_Articles/2024/AprMayJun2024/ProBeneficiaryChangesMedicare.aspx?subid=2916

Judith Stein and David Lipschutz, "The Medicare Home Health Benefit: An Unkept Promise," *To the Point* (blog), Commonwealth Fund, Apr. 28, 2022. <https://doi.org/10.26099/M366-WV45>

Judith A. Stein and David A. Lipschutz, "Surmounting Barriers to Medicare-Covered Care" GENERATIONS – Journal of the American Society on Aging, Winter 2019-20, Vol. 43, No. 4

Lipschutz, D. A. (2019). Commentary: Don't Further Privatize Medicare. *INQUIRY: The Journal of Health Care Organization, Provision, and Financing*. <https://doi.org/10.1177/0046958019867612>

David Lipschutz, Andrea Callow, Karen Pollitz, MaryBeth Musumeci, and Gretchen Jacobson “Comparison of Consumer Protections in Three Health Insurance Markets: Medicare Advantage, Qualified Health Plans and Medicaid Managed Care Organizations”, Kaiser Family Foundation (March 2015) <https://www.kff.org/medicare/report/comparison-of-consumer-protections-in-three-health-insurance-markets/>

California Elder Law Resources, Benefits & Planning Manual - Continuing Education of the Bar (University of California/State Bar of California) - 2003-2010 editions -- co-author of chapter on Medicare (re-write in 2003, update in 2004 -'10); co-author of chapter on Medicare appeals (2006 -'10)

Elaine Wong Eakin and David Lipschutz, “ABCD’s of Medicare for Low-Income Beneficiaries”, *Clearinghouse REVIEW Journal of Poverty Law and Policy* (Sargent Shriver National Center on Poverty Law) (March-April 2009, Vol. 42, Nos. 11-12)

Co-author of 9 issue briefs relating to Medicare policy (November 2005 – December 2008), 6 published jointly by California Health Advocates and the Medicare Rights Center and 3 published solely by California Health Advocates (see <http://cahealthadvocates.org/advocacy/index.html>); various briefs referenced in several national media reports, and cited in publications by *Health Affairs*, Commonwealth Fund, Kaiser Family Foundation, Center on Budget & Policy Priorities, Community Catalyst, National Health Policy Forum, and House Energy & Commerce Committee

Bonnie Burns, Kim Glaun and David Lipschutz “Consumers Face Inadequate Protections Concerning Medicare Part D Enrollment and/or Disenrollment”, *Journal of Insurance Regulation* (National Association of Insurance Commissioners) Winter 2005, Vol. 24, No. 2

People’s Guide - 2003 edition - L.A. Coalition to End Hunger & Homelessness - editorial committee and contributor to section on Medicare

Surviving the Legal Challenges – A Resource Guide for Women with Breast Cancer - 2003 edition - California Women’s Law Center - advisor

AWARDS/HONORS/MEMBERSHIP/MISCELLANEOUS

National Academy of Elder Law Attorneys (NAELA), Member, Joined 2019

National Academy of Social Insurance (NASI), Member, Elected 2013

Medicare Payment Advisory Commission (MedPAC), Reviewer of draft chapter on standardized benefits in Medicare Advantage plans (April 2023, chapter published in June 2023 Report to Congress)

Technical Expert Panel (TEP) on Medicare Advantage (MA) Network Adequacy Standards for Hospice within the Hospice Benefit Component of the Value-Based Insurance Design (VBID) Model, convened by MITRE for Center for Medicare & Medicaid Innovation (CMMI) - June- July 2021

National Association of Insurance Commissioners (NAIC), Senior Issues Taskforce, Medigap (B) Subgroup, Statutory Working Group Member - September 2015 - February 2016

Improving Medicare Markets Initiative (IMMI) Advisory Group, convened by National Council on Aging (NCOA), May 2014 - present

Leadership Council of Aging Organizations (LCAO), Co-Chair of Health Committee, July 2012 – June 2014

Federal Commission on Long-Term Care, established under Section 643 of American Taxpayer Relief Act of 2012 (P.L. 112-240), staffed Commissioner Judith Stein, Center for Medicare Advocacy, June – September 2013

National Association of Insurance Commissioners (NAIC), Senior Issues Taskforce, Medigap PPACA Workgroup – July 2011 – December 2012

National Council on Aging (NCOA), National Center for Benefits Outreach and Enrollment, Benefits Enrollment Center (BEC), Reviewer of Grant Applications, November 2011 and January 2009

National Association of Insurance Commissioners (NAIC), Senior Issues Taskforce, Medicare Advantage Subgroup – September 2007 – July 2008 (White Paper on regulation of Medicare Advantage plans adopted by NAIC in September 2008)

Medicare Payment Advisory Commission (MedPAC) – Expert Panel on Measuring Medicare Part D Plan Performance, Participant, February 7, 2008, Washington, DC

Health Assistance Partnership (a project of Families USA) – Member, Consumer Advisory Board – March 2007 – June 2008

Certificate of Appreciation from California Department of Aging – April 13, 2007

Southern California 2005 Rising Star – named by *Southern California Super Lawyers* magazine (September 2005)

Center for Health Care Rights – “Friend of HICAP” Award – 2004-2005 (December 9, 2005)

TESTIMONY/PRESENTATIONS/CONFERENCES

Trainings/Presentations – over 250 professional trainings/presentations on Medicare for volunteer counselors, attorneys, doctors, consumer advocates, legislative staff, members of Congress, social workers, journalists, health care professionals and various state agencies/boards, including: Pharmacy Board of California, CA Department of Managed Health Care, Triple A Advisory Council, CA State Independent Living Council; in addition, over 50 beneficiary-oriented trainings

Testimony

- U.S. House of Representatives, Committee on Ways & Means, Subcommittee on Health, Hearing on Medicare Advantage Costs, Benefits and Oversight, U.S. Capitol, Longworth Office Building, February 28, 2008

- U.S. House of Representatives, Committee on Energy & Commerce, Subcommittee on Oversight & Investigations, Hearing on Predatory Sales Practices in Medicare Advantage, U.S. Capitol, Rayburn Office Building, June 26, 2007

- U.S. House of Representatives, Committee on Ways & Means, Subcommittee on Health, Hearing on Medicare Advantage Private Fee-for-Service Plans, U.S. Capitol, Longworth Office Building, May 22, 2007

- U.S. House of Representatives, Committee on Energy & Commerce, Subcommittee on Health, Hearing: “Medicare Part D: Implementation of the New Drug Benefit”, U.S. Capitol, Rayburn Office Building, March 1, 2006

- California State Legislature, Joint Informational Hearing: "Medicare Prescription Drug Coverage: Challenges of Implementation and Status of State Assistance Efforts", Sacramento, CA, February 1, 2006
- White House Council on Aging – Solutions Forum – Sacramento, CA – March 9, 2005

Conferences/Workshops/Presentations (partial list)

2025

- "Medicare Updates" - California Dept. of Aging (CDA), 2025 Fall HICAP Training – Sacramento, CA – 9/10/25
- "The Big 'Beautiful' Bill Attacks Medicare Recipients and People with Disabilities by Driving Up Costs and Cutting Benefits" – webinar panelist – Center for American Progress – 6/24/25
- "Updates on Medicare Issues" – presenter – Hot Topics in Elder Law 2025 - Maryland State Bar Association (virtual) – 6/17/25
- "Framing of the Day" – moderator of panel featuring Patricia Neuman, KFF, at 12th Annual National Voices of Medicare Summit, Center for Medicare Advocacy – Washington, D.C. (and virtual) – 5/14/25
- "Conquering the Challenges of Medicare Advantage with Advocacy" – panelist, National Association of Rehabilitation Providers and Agencies (NARA) Spring Conference, Washington, DC – 4/30/25
- "DC Round-up: What Advocates Need to Know About Federal Aging Policy" – panelist, American Society on Aging (ASA) On Aging 2025 conference, Orlando, FL – 4/23/25
- "Medicaid and Medicare: Programs Under Attack" – panelist, Special Needs Alliance 2025 Annual Spring Meeting, Washington, DC – 3/14/25

2024

- "Medicare Advantage" – panelist (virtual), National Association of Long Term Hospitals (NALTH) Fall 2024 Conference – 10/24/24
- "Medicare Updates" and "Practical Tips: Implementing *Jimmo*" – Elder Law Institute 2024, Pennsylvania Bar Institute (PBI), Harrisburg, PA – 7/25/24
- "Medicare Issues" – presenter – Hot Topics in Elder Law 2024 - Maryland State Bar Association (virtual) – 6/18/24
- "Galvanizing Stakeholders and Policy Makers for Change" – panelist, Public and Private Health System Integration: Challenges, Opportunities and the Oral Health Experience, Harvard School of Dental Medicine Initiative – Boston, MA – 6/4/24
- "Home Health Care" – panelist, I AM ALS 2024 Community Summit – Washington, D.C. – 5/31/24
- "Advanced Medicare Issues" – presenter – 2024 Advanced Elder Law Review, National Academy of Elder Law Attorneys (NAELA) 2024 Annual Conference – Boston, MA – 5/2/24
- National Academy of Elder Law Attorneys (NAELA)
- "Framing of the Day" – moderator of panel featuring Patricia Neuman, KFF, at 11th Annual National Voices of Medicare Summit, Center for Medicare Advocacy – Washington, D.C. (and virtual) – 4/24/24
- "DC Round-up: What Advocates Need to Know About Federal Aging Policy" – panelist, American Society on Aging (ASA) On Aging 2024 conference, San Francisco, CA – 3/27/24
- "Policy Spotlights: Caregiving, Medicare and Social Isolation" – panelist, USAging Policy Briefing, Washington DC – 3/13/24
- "Fireside Chat with PACE Stakeholders" – panelist, National PACE Association (NPA) Spring Policy Forum, Washington DC – 3/11/24
- "Medicare Updates" – presenter, Life Care Planning Law Firm Association (LCPLFA) conference, Las Vegas, NV (appeared virtually) – 2/23/24

2023

- "Demystifying Medicare for Patients: Traditional Medicare vs. Medicare Advantage" - panelist, American Medical Association (AMA) Conference, 2023 Interim Meeting of the AMA Senior Physicians Section, National Harbor, MD - 11/10/23
- "What SNT Professionals Need to Know About Medicare" - Stetson University School of Law, 2023 Conference on Special Needs Planning and Special Needs Trusts" - St. Petersburg, FL - 10/20/23
- "Medicare Updates" - California Dept. of Aging (CDA), 2023 Fall HICAP Training - Sacramento, CA - 9/20/23
- "Medicare Advantage: New Prior Authorization Rules" - presenter, National Association of Long-Term Hospitals (NALTH) Fall 2023 LTCH Leadership Conference, National Harbor, MD - 9/14/23
- "Updates on Medicare Advantage Prior Authorization and Marketing Rules" - presenter, and "The 10th Anniversary of Jimmo: Where Are We with Medicare Coverage for People With Longer Term Conditions Now?" - panelist, 2023 SMP/SHIP/MIPPA Conference (Administration for Community Living), Bethesda, MD - 7/26/23
- "Medicare Updates and *Jimmo* at 10 Years" - Keynote Presentation - Elder Law Institute 2023, Pennsylvania Bar Institute (PBI), Harrisburg, PA - 7/25/23
- "Medicare Issues" - presenter - Hot Topics in Elder Law 2023 - Maryland State Bar Association (virtual) - 6/14/23
- "Policy Potpourri Panel" - panelist - USAging, Aging Policy Briefing & Capitol Hill Day, Washington D.C. - 4/26/23
- "Breaking Down Barriers to Care" - moderator of panel at 10th Annual National Voices of Medicare Summit, Center for Medicare Advocacy - Washington, D.C. (and virtual) - 4/20/23
- "DC Round-Up: What Advocates Need to Know About Federal Aging Policy" - panelist (March 2023); On Aging 2023 - Annual Conference of the American Society on Aging (ASA) - Atlanta, GA - 3/29/23

2022

- "Biden-Harris Public Policy in Support of Aging" - panelist - Grantmakers in Aging (GIA) Conference - Scottsdale, AZ - 10/17/22
- "Medicare Hot Topics" - presenter - Life Care Planning Law Firm Association (LCPLFA) Conference- Alexandria, VA - 9/23/22
- "What's New for Medicare in 2023", "Overview of the Medicare Appeals Process", "Advocacy Tips for Assisting with Medicare Appeals" - presenter - California Dept. of Aging (CDA), HICAP 2022 Fall Training (virtual) - 9/20/22
- "Medicare Updates" - presenter - 2022 Hot Topics in Elder Law - Maryland State Bar Association (virtual) - 6/16/22
- "Conversation with Medicare Directors: A Vision for Medicare to Meet Beneficiary Needs" - moderator of panel with Dr. Meena Seshamani and Sean Cavanaugh, current and former Center for Medicare Directors, 9th Annual National Voices of Medicare Summit, Center for Medicare Advocacy (virtual) - 5/18/22
- "Advanced Medicare Issues" - presenter - 2022 Advanced Elder Law Review, National Academy of Elder Law Attorneys (NAELA) 2022 Annual Conference - Scottsdale, Arizona - 5/12/22
- "Medicare Appeals" - presenter on webinar for SHINE, Area Agency on Aging for Southwest Florida (state SHIP program) - 4/21/22
- "DC Round-Up: What Advocates Need to Know About Federal Aging Policy" - panelist (4/11/22); "Biden-Harris Administration: 1st Year Public Policy in Support of Aging" (4/12/22) - On Aging 2022 - Annual Conference of the American Society on Aging (ASA) - New Orleans, LA
- "Policy Potpourri Panel" - panelist - USAging, Aging Policy Briefing & Capitol Hill Day, Washington D.C. - 3/30/22

2021

- "Medicare Updates"; "Medicare Appeals and Advocacy"; and "The Future of Medicare" - presenter - California Dept. of Aging (CDA), HICAP 2021 Fall Training (virtual) - 9/28/21
- "Direct Contracting Entities (DCEs): Handing Traditional Medicare to Wall Street" - panelist on webinar sponsored by Physicians for a National Health Program (PNHP) - 9/23/21

- "Medicare Update" - presenter - 2021 Hot Topics in Elder Law - Maryland State Bar Association (virtual) - 6/17/21
- "Health Equity in Medicare"- panelist - Administration for Community Living (ACL) 2021 SHIP/SMP National Conference (virtual) - 4/28/21
- "Nursing Homes, Long Term Care Facilities and Human Rights" - panelist - Fair Housing and Civil Rights Conference (virtual) - 4/14/21
- "DC Round-Up: What Advocates Need to Know About Federal Aging Policy" - panelist - On Aging 2021 - Annual Conference of the American Society on Aging (ASA) (virtual) - 4/7/21
- "Medicare Updates" - presenter - California Dept. of Aging (CDA), HICAP 2021 Spring Training, (virtual) - 4/6/21
- "Challenges and Opportunities Facing Medicare and Health Care in the New Administration and Congress" - moderator of panel including Tricia Neuman, Kaiser Family Foundation, Chris Jennings, Jennings Policy Strategy, and Amy Hall, House Ways & Means Committee, 8th Annual National Voices of Medicare Summit, Center for Medicare Advocacy, (virtual) - 4/1/21

2020

- "Medicare and Medicaid Updates and Pandemic Response" - presenter - National Aging and the Law (NALC) Conference - 10/23/20 (virtual)
- "How Will the Pandemic Drive Health Care and Aging Policy in a Post-Pandemic World?" - panelist - n4a Aging Policy Summit, part of n4a Annual Conference and Tradeshow - 9/23/20 (virtual)
- "Medicare Coverage for Individuals Under 65 with Disabilities" - presenter - Stetson's National Conference on Special Needs Planning and Special Needs Trusts -2020 Virtual Event (webinar recorded 9/11/20)
- "Medicare Updates" - presenter - California Dept. of Aging (CDA), HICAP 2020 Fall Program Manager Training, (virtual) - 9/8/20
- "Coping with Medicare and COVID-19: The New Normal" - panelist - Administration for Community Living (ACL), SHIP/SMP National Conference (virtual) - 7/21/20
- "Medicare and Family Caregivers" - presenter - Administration for Community Living (ACL), RAISE Act Family Caregiving Advisory Council Meeting, (virtual) - 7/16/20
- "Medicare Update" - presenter - 2020 Hot Topics in Elder Law - Maryland State Bar Association, (virtual) - 7/7/20
- "Media: Coverage and Concerns" - panel moderator, 7th Annual National Voices of Medicare Summit, Center for Medicare Advocacy, (virtual) - 4/30/20

2019

- "Addressing Access Barriers in Medicare" - panelist and moderator - National Health Law Program (NHeLP) Health Advocates Conference, Washington, DC - 12/9/19
- "Advanced Medicare Issues" - presenter - National Academy of Elder Law Attorneys (NAELA) 2019 Advanced Elder Law Review, Washington DC - 11/13/19
- "Participating in a Medicare Administrative Law Judge Hearing" - panelist; "Medicare Updates" - panelist - National Aging and the Law Conference (NALC) - Arlington, VA - 10/31/19 - 11/1/19
- "Medicare Updates" - presenter - Maine Statewide SHIP/SMP Conference - 9/25/19 - Augusta, ME
- Medicare Presentations "2020 Changes and Updates", "Upcoming ACEP - What to Expect", "Ongoing Barriers to Care" and "Future of Medicare " - presenter - Heath Insurance Counseling and Advocacy Program (HICAP) 2019 Fall Training - Folsom, CA - 9/17/19
- "Medicare Update" - presenter - 2019 Hot Topics in Elder Law - Maryland State Bar Association, Columbia, MD - 6/5/19
- "Medicare: What It Was, Is, and Could Be" - panel moderator, 6th Annual National Voices of Medicare Summit, Center for Medicare Advocacy, Washington, DC - 5/9/19
- Health Care for America Now (HCAN) National Meeting - panelist - Evaluating the Proposals & Key Considerations (Medicare for All) - Washington, DC - 2/20/29
- "Medicare: Risks and Opportunities for 2019" - panelist - Families USA Health Action Conference 2019 - Washington, DC - 1/25/19

2018

- "Medicare Updates" – moderator – National Health Law Program (NHeLP) Health Advocates Conference, Washington, DC - 12/3/18
- "Medicare A, B, Cs ... and D" – presenter – National Aging and the Law Conference (NALC) – Alexandria, VA – 10/25/18
- "Medicare Hot Topics, Advocacy and Opportunities for Collaboration" – panelist – National Association of Area Agencies on Aging (N4A) Annual Conference and Tradeshow - Chicago, IL - 7/30/18
- "Medicare Update" – presenter – 2018 Hot Topics in Elder Law - Maryland State Bar Association, Columbia, MD - 6/21/18
- "The ABCDs of Medicare Parts A, B, C ... and D" – presenter - National Academy of Elder Law Attorneys (NAELA) Annual Conference and Pre-Workshop – New Orleans, LA – 5/16/18
- "Medicare Updates" - California Department of Aging - HICAP Spring Training - Irvine, CA – 4/17, 4/18/18
- "Wait, Wait, Don't Tell Me' – Health Care Hot Topics" – panelist, 5th Annual National Voices of Medicare Summit, Center for Medicare Advocacy, Washington, DC – 3/22/18
- "Medicare: Advocacy Priorities for 2018 and Beyond" – panelist – Families USA Health Action Conference 2018 - Washington, DC - 1/26/18

2017

- "Medicare Updates" – moderator – National Health Law Program (NHeLP) Health Advocates Conference, Washington, DC - 12/4/17
- "Fifth Annual 'Wait, Wait, Don't Tell Me' Medicare Hot Topics" - panelist; "Future of Medicare & Medicaid" – co-presenter - National Aging and Law Conference (NALC) – Silver Spring, MD - 10/26/17 – 10/27/17
- "Medicare Update" – presenter – 2017 Hot Topics in Elder Law - Maryland State Bar Association, Columbia, MD - 6/22/17
- "Medicare and Benefits Programs for Seniors and the Disabled Community: How are New Policies Going to Affect Older Americans?" – panelist – Maryland State Bar Association (MSBA) Annual Meeting – Ocean City, MD – 6/16/17
- "Medicaid, Medicare and the Road Ahead" – panelist – National Association of Area Agencies on Aging (N4A) Aging Policy Briefing & Capitol Hill Day - Washington, DC - 4/3/17
- "Moving Forward: Jimmo, Observation Status, Coverage for Oral Health and Audiology Care, Therapy Caps, Due Process" – panel moderator, 4th Annual National Voices of Medicare Summit, Center for Medicare Advocacy, Washington, DC – 3/30/17
- "Consumer Perspective" – panelist – National PACE Association (NPA) Spring Policy Forum, Washington, DC - 3/20/17

2016

- "Medicare Updates" – moderator – National Health Law Program (NHeLP) Health Advocates Conference, Washington, DC - 12/6/16
- "ABCs of Medicare Parts A, B, C ... and D", presenter; "Fourth Annual 'Wait, Wait, Don't Tell Me' Medicare Hot Topics" - panelist – National Aging and Law Conference (NALC) – Alexandria, VA - 10/27/16 – 10/28/16
- "Transitions in Coverage; Future of Medicare"; "Ongoing Barriers to Care and Medicare Appeals – The Beneficiary Perspective"; "Transitioning from Covered California to Medicare" – presenter - HICAP & SMP 2016 Fall Training (CA Dept. of Aging) - Sacramento, CA - 9/20/16-9/21/16
- "Medicare Updates" – presenter – Hot Topics in Elder Law - Maryland State Bar, Columbia, MD - 6/29/16
- "Medicare Reform: A Beneficiary Perspective" – panel moderator, 3rd Annual National Voices of Medicare Summit, Center for Medicare Advocacy, Washington, DC - 4/1/16

2015

- "Medicare Updates" - presenter - National Health Law Program (NHeLP) Health Advocates Conference, Washington, DC - 12/7/15
- "Third Annual 'Wait, Wait, Don't Tell Me' Medicare Hot Topics"- panelist - National Aging and Law Conference (NALC) - Arlington, VA - 10/29/15
- "Medicare Advantage" - presenter - 2015 Maine SHIP/SMP Conference, Bangor, ME - 9/30/15
- "Medicare Updates" - presenter - Hot Topics in Elder Law - Maryland State Bar, Columbia, MD - 7/14/15
- "Medicare & Individuals with Disabilities" - presenter - National Organization of Social Security Claims Representatives (NOSSCR) Disability Law Conference, Arlington, VA - 5/6/15
- "Getting Our Voices Heard" - panel moderator, 2nd Annual National Voices of Medicare Summit, Center for Medicare Advocacy, Washington, DC - 3/20/15

2014

- "Medicare Updates" - moderator and presenter - National Health Law Program (NHeLP) Health Advocates Conference, Washington, DC - 12/8/14
- "Wait, Wait, Don't Tell Me' Medicare Hot Topics"- panelist; 10/17/14 - "Lightning Round! Healthcare and Economic Rights" - panelist - National Aging and Law Conference (NALC) - Washington, DC - 10/16/14
- "Medicare Updates" - presenter - Hot Topics in Elder Law - Maryland State Bar, Columbia, MD - 6/27/14
- "Charting the Future" - moderator of panel including Jonathan Blum, CMS Deputy Administrator, and Bruce Vladeck, Senior Advisor, Nexera (and former HCFA Administrator), 1st Annual National Voices of Medicare Summit, Center for Medicare Advocacy, Washington, DC - 3/21/14

2013

- "Medicare Updates" - moderator and presenter - National Health Law Program (NHeLP) Health Advocates Conference, Washington, DC - 12/8/13
- "Medicare Hot Topics"- panelist - National Academy of Elder Law Attorneys (NAELA/NALI) conference - Washington, DC - 11/8/13
- "Public Interest Session - The Medicare Improvement Standard: Implementing the *Jimmo* Settlement" - American Health Lawyers Association (AHLA), Baltimore, MD - 3/21/13
- "Medicare and Federal Budget" - Families USA Health Action 2013 Conference, Washington, DC - 2/2/13
- "Meeting the Necessary Compliance Requirements" - World Congress' Medicare Advantage and Compliance Conference, Arlington, VA - 1/29/13

2012

- "Medicare Hot Topics"- panelist - National Academy of Elder Law Attorneys (NAELA/NALI) conference - Washington, DC - 11/10/12
- "Medicare in Changing Times" - speaker - Michigan State Bar Elder Law & Disability Rights Conference, Crystal Mountain, MI - 10/4/12

2011

- National Health Law Program (NHeLP) Health Advocates Conference- Washington, DC - December 2011 - panelist ("Medicare in the World of Deficit Reduction" and "Update Re: Due Process and Medicare Part D")
- National Aging and Law Conference (NALC) - Boston, MA - November 2011 - panelist ("Boot Camp: Public Benefits - Intro to Medicare" and "Medicare Hot Topics")
- Life Care Planning Law Firm Association (LCPLFA) - Bethesda, MD - September 2011 - presenter ("Improvement Standard, Observation Status, Hospital Discharge Appeals and Other Miscellany")

2010

- National Aging and Law Conference (NALC) - Arlington, VA - December 2010 - panelist ("Intro to Medicare")

- The California Wellness Foundation (TCWF) 2010 Conference on Healthy Aging – Los Angeles, CA – February 2, 2010 – panelist (“Medicare – The Potential Impact of Health Reform”)
- Families USA “Health Action 2010” – Washington, D.C. – January 30, 2010 – panelist (“Strengthening SHIP Advocacy in Your State – California’s Example”)

2009

- California Association of Area Agencies on Aging (C4A) – Annual Meeting and Allied Conference – Los Angeles, CA – November 18, 2009 – presenter (“Medicare Updates: 2010”)
- National Organization of Social Security Claims Representatives (NOSSCR) – Social Security Disability Law Conference – San Francisco, CA – October 14, 2009 – presenter (“Medicare Part D Basics”)
- Inland Empire Disability Collaborative (IEDC) Conference – Riverside, CA – October 10, 2009 – presenter (“Medicare for Individuals with Disabilities: A Brief Primer”)

2008

- National Aging and the Law Conference (NALC) – Crystal City, Virginia – December 6, 2008 – panelist (“Medicare Advantage and Part D Marketing: Teaming to Protect Seniors”)
- California Association of Area Agencies on Aging (C4A) – Annual Meeting and Allied Conference – Los Angeles, CA – November 18, 2008 – presenter (“Medicare: MIPPA 2008, New Marketing Rules, and Other Updates for 2009”)
- National Organization of Social Security Claims Representatives (NOSSCR) – Social Security Disability Law Conference – Los Angeles, CA – October 15, 2008 – speaker (“Medicare Part D Basics”)
- Pathways to Justice Conference (CA State Bar) – Los Angeles, CA – June 6, 2008 – panelist (“Quicksand for Medicare/Medi-Cal Beneficiaries: Health Care Delivery in a State of Flux”)

2007

- National Aging and the Law Conference (NALC) – Crystal City, Virginia – October 13, 2007 – panelist (“Medicare Advantage Private Fee for Service (PFFS) Plans”)
- Families USA “Health Action 2007” – Washington, D.C. – January 26, 2007 – panelist (“Medicare’s New Alphabet Soup – Mm’m Good? – The Beneficiary Perspective”)

2006

- Families USA “Health Action 2006” – Washington, D.C. – January 26, 2006 – panelist (“Helping Low-Income Beneficiaries Navigate Medicare Part D”)
- California Association of Area Agencies on Aging (C4A) Allied Conference – HICAP Training -- Irvine, CA – November 14, 2005 – presenter (“Medicare Part D: Updates for 2007”)

2005

- California Primary Care Association – conference – Burbank, CA – September 30, 2005 – panelist (“Medicare Part D: The Patient Focus”)
- State Bar of California – 2005 Spring Summit: Pathways to Justice – San Francisco, CA – June 2, 2005 – panelist (“Medicare Managed Care”)
- Office of the Patient Advocate – Consumer Advocacy Symposium – Los Angeles, CA – May 17, 2005 – panelist (“The Medicare Modernization Act: Medicare Prescription Drug Benefit – Part D”)

MEDIA

Regularly quoted/interviewed/referenced in various publications, including (partial list): *New York Times*, *Washington Post*, *Wall Street Journal*, *Inside Health Policy*, *Bloomberg Law*, *Kaiser Health News*, *NPR*, *Fortune*, *U.S. News & World Report*, *Congressional Quarterly*, *CQ HealthBeat*, *The Guardian*, *Rolling Stone*, *MedPage Today*, *Los Angeles Times*, *CNN Money*, *CNBC*, *Huffington Post*, *Politico*, *WebMD*, *U.S.A. Today*, *Kiplinger’s Personal Finance* magazine, *Money* magazine, *Sacramento Bee*, *San Francisco Chronicle*, *Oakland Tribune*, *San Jose Mercury News*, *KQED* (television and radio, San Francisco), *ABC News “World News Tonight”*, *KPFK* (radio, Los Angeles), *KXJC* (radio, Sacramento), *KPCC* (radio, Los Angeles)