



NATIONAL ORGANIZATION OF
SOCIAL SECURITY CLAIMANTS'
REPRESENTATIVES

ESTABLISHED 1979

NextGen Retreat

Madison, WI

CLE Sessions on October 7 and 8 from 8:30 AM to 12:30 PM and followed by lunch.

Day 1, Session 1 (90 minutes) 8:30-10:00a.m.

1. **Beginners Toolkit** - Stephen Sloan and Christine Burnside - This presentation will cover the basics of the Social Security Disability Practice and give newer practitioners a working knowledge of fundamental best practices for responsible and ethical representation and to ensure your clients have the best possible chance of winning their case. It will cover everything from a general overview of the disability programs, the 5 steps of disability evaluation, preparing for a hearing, and what happens after you win the case, including fees. Bring your burning questions regarding representation at the hearing level for the Q and A following the presentation.

Key Takeaways:

- Understanding the key differences between DIB and SSI
- Avoiding common pitfalls in selecting and representing clients
- How to develop the record
- Sample 5-day letters
- Basics of expert cross-examination

Speakers

- ❖ Christine Burnside practices in Greensboro, NC. She graduated from UNC-Chapel Hill School of Law in 2012 has been a Social Security disability attorney with the Deuterman Law Group since September 2012. In 2019, Christine passed the North Carolina State Bar Legal Certification exam to become a Board Certified Specialist in Social Security disability law. Christine focuses mainly on claims from the initial to hearing level. She has been part of the North Carolina Advocates for Justice Disability Advocates' Section leadership committee since 2019 and currently serves as chair for public outreach.
- ❖ Stephen Sloan received his undergraduate degrees from the University of North Texas in 2007 and his J.D. from Chicago-Kent College of Law in 2015. Stephen has worked with Daley Disability Law since 2014 and in the years since he has gained extensive experience at both the administrative and federal court levels of review, with success in hundreds of cases in a multitude of district courts covering 12 of the thirteen appellate circuits, as well as arguing in both the Sixth and Seventh Circuit Appellate Courts. He has participated in speaking engagements for NOSSCR, NADR, the National Business Institute, and the Chicago Bar Association on multiple occasions. Stephen has been a Super Lawyers Rising Star since 2018 and was the 2019-2020 chair of the Chicago Bar Association's Social Security Committee.

2. **FDC practice from A to Z** - Melissa Palmer, Marisa Burkett, and Laura-Beth Waller - A panel of high-volume federal court practitioners with experience in jurisdictions around the country will discuss federal appeals from beginning to end. Topics will include spotting appealable issues, researching procedural and substantive issues for initial filings and briefs, and common issues faced with filing and negotiating EAJA and 406(b) fees.

Speakers

- ❖ Melissa is a 2012 graduate of Syracuse University College of Law and has since practiced exclusively in the area of Social Security Disability. She is licensed in New York and is admitted to practice in various District and Circuit Courts around the country. Melissa's practice has been limited to federal court appeals. Melissa joined Olinsky Law Group in February 2017. She made partner in January 2022 and is the attorney in charge of the Approved Claims Department. She oversees all fee related matters for the firm, from filing of fee petitions to fee collection.
- ❖ Marisa is a 2013 graduate of Pennsylvania State University Dickinson School of Law, and has since practiced exclusively in the area of Social Security Disability. She is licensed in both New York and Washington State and has experience writing appellate briefs for disability claims nationwide. Marisa has assisted individuals at all levels of the appeals process from pre-hearing case development through appeals to Circuit Courts. Marisa joined Salus Disability Law in July 2018 to develop the firm's appellate department. She manages the cases proceeding through Federal District Courts, from the initial filing to judgment and fees.
- ❖ Laura Beth Waller is an associate attorney focused on district court work at Martin, Jones, and Piemonte. She is a graduate of the University of North Carolina at Wilmington with a bachelor's degree in Political Science with minors in Spanish and International Affairs. She graduated magna cum laude from North Carolina Central University School of Law. She went on to earn her LL.M. in Taxation from the University of Washington in Seattle. Laura Beth is admitted to practice in North Carolina, Washington, and Georgia. She is a member of the National Organization of Social Security Claimants' Representatives and is co-chair of the NextGen Committee. She is also a North Carolina Advocates for Justice member, serving as Secretary of the Disability Advocacy Section.

10:00-10:15 a.m. BREAK

Day 1, Session 2 (90 minutes) 10:15-11:45 a.m.

1. **Worker's Compensation Offsets & Reverse Offsets** - Donnie Malchow (30 minutes)
This presentation addresses the interaction of worker's compensation benefits with Social Security disability benefits. You will learn the history of the worker's compensation offset and reverse offset, as well as how the Social Security Administration calculates the offset, how the offset may be calculated differently

depending on state legislation (an unusual occurrence in Social Security practice), and practical tips for when SSA applies the incorrect standard to calculate your client's offset.

Speakers

- ❖ Donnie Malchow is an Associate Attorney at the Hawks Quindel Madison office. He practices worker's compensation and Social Security disability law. Attorney Malchow grew up in the small town of Ripon, Wisconsin, where he received his Bachelor of Arts degree in Music Performance from Ripon College before going on to graduate from the University of Wisconsin Law School. In law school, he served as the Senior Articles Editor of the Wisconsin Law Review. Attorney Malchow worked as a worker's compensation attorney and Social Security disability attorney in Wisconsin's Fox Cities before joining the Hawks Quindel Madison office, and he takes pride in helping injured persons navigate daunting administrative and legal bureaucracies.
- 2. **Medicare 101** – Kelli Cosby and Brendon Cassity - Insurance Branch Solutions (60 minutes) - Many clients are unaware of their Medicare entitlement and seem surprised to receive the benefit. Some clients may not receive their notice in the mail, others set it aside to look at later, and many even cancel Medicare once they see the monthly premium of \$170.10. Medicare, in general, is set up to assist those 65 or older. But those who receive Medicare through their disability benefit face different challenges. In this session, you will learn the basics of Medicare and how having a plan in place can positively impact your clients' quality of life.

Speakers

- ❖ Kelli Cosby is a results-oriented leader who combines a sound understanding of compliance principles and expert implementation practices in her current position as VP Managing Partner with Insurance Branch, the leading provider of Medicare education for disabled individuals. In this role, she actively works with disability attorneys and advocates in assisting their clients understand their complex Medicare benefits.

Prior to joining the team at Insurance Branch, Kelli spent 20 years as a Licensed Loan Officer and Account Executive in the mortgage industry and the last 10 years working at one of the country's premier insurance agencies specializing in assisting clients going on Medicare early because of a disability. She began as a licensed agent and then as Operations Manager, overseeing a team of 20+ employees. In her position as Operations Manager, Kelli developed, implemented, and maintained a cutting-edge training program that resulted in a department that exceeded performance targets and consistently received overwhelming superior customer service ratings.

Kelli maintains an active Health and Life Insurance license in order to stay on top of the ever-changing world of Medicare. Her experience is a unique combination of sound compliance practices and outstanding customer service.

11:45-12:00 BREAK

Day 1, Session 3 (45 minutes) 12:00-12:45p.m.

Update from Chief Judge Nagle's office from ALJ Brian Saame on state of affairs of SSA

Day 2, Session 1 (90 minutes) 8:30-10:00a.m.

1. **The Bottom Line: Building a Disability Practice, Saving Money, and Winning Cases.** -- Jessica Mitchell via zoom and Maren Miller Bam - This presentation will include strategies to navigate the current economic and political client while keeping your Social Security Practice thriving. The presentation will address strategies for signing new clients and winning cases at the agency levels. We will also discuss the changes in medical records laws and what your firm can do to cut costs and ensure you have timely records for your clients. Navigating the uptick in new claimants, backlogs at the agency, and fallout from CIOX v. Azar are key to building a sustainable Social Security Practice.

Key Takeaways:

- ❖ How to Sign Clients In Real Time
- ❖ Using Compassionate Allowances and Dire Needs to Move Cases Faster
- ❖ How to Use the SSI EPFT Tool and Make Money on SSI Only Cases
- ❖ How to Get Low-Cost Medical Records Nationwide
- ❖ How to Ensure that You Get **ALL** the records for your case

Speakers

- ❖ Jessica L. (Kurtz) Mitchell, Esq. is an attorney at Schmidt Kramer PC in Harrisburg, PA where she focuses her practice on representing central Pennsylvania claimants in Social Security Disability and workers' compensation matters. Jessica has been recognized by Super Lawyers – Rising Stars, the Best Lawyers in America, and one of the Top 10 Best Social Security Disability Attorneys (awarded by the American Institute of Legal Counsel). She is a Vice-Chair of the UCP Central Pennsylvania Board of Directors, as well as an active member of NOSSCR, the Dauphin County Bar Association, the Pennsylvania Association for Justice, and the Pennsylvania Bar Association. Jessica earned her B.A. in political science and French from Washington and Jefferson College in 2008, followed by her J.D. from the Penn State University Dickinson School of Law in 2011. In 2010, she studied at the Maastricht University Faculty of Law in Maastricht, the Netherlands. Jessica can be reached by email at jmitchell@schmidtkramer.com.
- ❖ Maren Miller Bam is a 2013 Penn State Dickinson Law Graduate who has worked solely as a Social Security Attorney throughout her career. Maren has represented more than 1,000 individuals seeking Social Security Disability Benefits and Supplemental Security Income. She owns Salus Law, a Washington State Law firm that serves Social Security claimants nationwide. Maren has experience assisting individuals from the initial

application stage through Federal District Court. She has built a high-volume legal practice dedicated to getting clients the benefits they deserve. Maren's firm is built on efficiency, customer service, and using technology to make legal representation more accessible to differently-abled individuals.

2. **Special Circumstances: How to handle claims when your client is unavailable or difficult to reach** - Jillian Davis and Rebecca Borkovec - This session will touch on methods to locate clients, and give a more in depth view of how to handle claims when your client is unavailable or difficult to reach, including if they are incarcerated or deceased. Contact with claimants is particularly important in light of CFR § 404.1740 Rules of conduct and standards of responsibility for representatives, and we will give ideas of how you can continue to meet your due diligence in these difficult situations.

Key Takeaways:

- Methods to use in trying to locate clients when you have lost contact
- How to handle a claim once you find out your client is incarcerated
- How to handle a claim once you find out your client is deceased

Speakers

- ❖ Jillian Davis is a graduate of Marquette University having earned her Bachelor's Degree in Psychology in 2012 and, by being a part of the Marquette University Pre-Law Scholar's Program, earned her law degree in 2014. After graduating, she practiced family law for two years dealing with divorce and paternity cases. In 2016, she joined Tabak Law, LLC and has since focused the majority of her practice on Social Security Disability cases. Attorney Davis has handled thousands of disability cases for Tabak Law, LLC, at both the hearing level and Appeals Council level.
- ❖ Rebecca Borkovec is a graduate of Marquette Law School. She has been practicing Social Security Disability at Tabak Law, LLC since 2018. In her work, she specializes in disability claims at the hearing and Appeals Council levels, handling a variety of issues that complicate the disability process. She is also active in the volunteer legal community in Milwaukee, furthering the interests of individuals in need.

10:00-10:15a.m. BREAK

Day 2, Session 2 (60 minutes) 10:15-11:15a.m.

1. **Legal Ethics: Representing the disabled, the incompetent, and the impaired capacity client**—Amanda Pirt Meyer – This ethics presentation will provide an overview of the rules (model and otherwise) of professional responsibility that may apply when representing individuals who may have impaired capacity, been deemed incompetent, or have a disability. We'll review common communication, neurological disorders, and how the symptomatology attached to those impairments may require a

legal representative to communicate differently for effective representation. This presentation will include scenarios with a dissection of the ethical considerations. Relevant case law, reprimands, and ethics opinions may be included as relevant.

Speakers

- ❖ “Pirt” is an attorney with Haskins Short & Brindley LLC where she focuses her practice on Social Security disability law, guardianships, estate planning, probate law, elder law issues, and special needs trusts. She is also a Veterans Administration-certified attorney. Pirt has a background in health insurance and science, and began her legal career by practicing personal injury law. She is a frequent professional and community presenter on issues in Social Security disability law and elder law, so look for her blonde (or sometimes pink or gray) head in a library, community hall, conference center, school, or Zoom conference near you.

Pirt is a member of the National Organization of Social Security Representatives, Wisconsin chapter of the National Academy of Elder Law Attorneys (WiNAELA), the State Bar of Wisconsin, and the Dane County Bar Association. She is Board President of National Alliance on Mental Illness (NAMI) Dane County, WiNAELA’s Wisconsin Chapter Ambassador, and has served on the Dane County Bar Association Board.

Pirt was born in Milwaukee, but grew up in central North Carolina. She earned her B.S. degree from the University of North Carolina at Greensboro where she was a Katherine Smith Reynolds Scholar. After working briefly in Durham, North Carolina, she returned to Wisconsin and earned her J.D. degree from Marquette University Law School.

2. **The Appeal Council’s Top 10 Reasons for Remanding Cases. How to prepare and present a case to get a remand!** – Kristi F. Reppel (Olinsky Law Group) and Blair Biser - Have you ever wondered what the Appeals Council was thinking when they issued a remand? Did you know that every year the Appeals Council publishes their "Top 10 Reasons for Remanding Cases"? In this seminar, we will address the Appeals Council's list and explain what it means for your Claimants’ appeals. We will cover strategies on how to prepare for an appeal before and during a hearing. We will give tips on how to spot errors in an ALJ’s decision and how to argue them before the Appeals Council.

Key Takeaways:

- Why do AC cases get Remanded?
- How to setup an appeal.
- The importance of filing an AC brief.
- Remands are always a possible outcome.

Speakers

- ❖ Blair Biser is a partner and lead Social Security Disability attorney with Hardison & Cochran, PLLC in Raleigh, NC. He recently celebrated his 16th anniversary with the firm and has been representing claimants before the Social Security Administration since 2005. He has been certified by the North Carolina State Bar as a specialist in Social

Security Disability since 2010. His practice is focused solely on representation of Social Security disability claimants at all levels of claims, from initial filings through federal court appeals. Blair lives in Cary, NC with his wife and daughter. In his free time, Blair enjoys photography, making music and visiting the NC mountains and coast.

- ❖ Kristi is a 2010 graduate of Western New England University School of Law and is licensed to practice in New York State. At the beginning of her career she was a personal injury litigator. She started practicing in the Social Security Disability field in 2013 when she joined the Olinsky Law Group. At that time she represented clients at the hearing level. Since 2018, Kristi has focused her practice on representing Social Security Claimants at the Appeals Council. She also represents the firm's Workers' Compensation clients.

As the leader of the Appeals Councils department at the Olinsky Law Group, Kristi's team files hundreds of AC briefs per month for law firms nationwide. Her extensive knowledge of the Social Security Appeals Council is vital in helping you learn more about this step in the journey to get your client the benefits they deserve.

Since 1986, Olinsky Law Group has helped tens of thousands of individuals secure their rightful benefits. With decades of disability benefits experience that includes Social Security Disability, SSI, Long-Term Disability, and Workers' Compensation, Olinsky Law Group has become a national leader in Social Security Appeals Council and Federal Court Appeals.

11:15-11:30a.m. BREAK

Day 2, Session 3 11:30-12:30 p.m. (60 minutes)

3. **Ask the Experts: VE's** – Moderated by Ashley Hartman Sappenfield – Vocational Experts Todd Gendreau and Merrill Cohen via Zoom - This panel is a great opportunity for attorneys to ask VEs the tough questions, find out where they derive their data, and what are the best ways to get them to say "No Jobs". Attorney Ashley Hartman Sappenfield will moderate this Q&A style presentation with Vocational Consultants Meryl Cohen and Todd Gendreau appearing to answer questions.

Speakers

- ❖ Ashley Hartman Sappenfield is the Social Security Disability Department Attorney and Manager at Lanier Law Group. Attorney Sappenfield graduated from the University of North Carolina at Wilmington with a degree in English Literary Studies. She received her law degree from Elon University School of Law where she participated in Moot Court and the Pro Bono Board. She is a member of the National Organization of Social Security Claimant's Representatives (NOSSCR) and is co-chair of the Next Generation Committee. Additionally, she is a member of the North Carolina Advocates for Justice Disability Advocacy Section and is Education Co-chair. She is licensed to practice law in North Carolina and primarily appears in the Asheville, Charlotte, and Greensboro Hearing offices. When Attorney Sappenfield is not working, she enjoys spending time

with her husband, daughter, and dog.

- ❖ Merrill Cohen has been with Strategic Consulting Services since February 2007. She has more than 25 years of experience providing vocational assessment, rehabilitation planning, earning capacity evaluations and life care planning. She has been admitted as an expert witness in state courts in Washington, Oregon, and Alaska as well as in Federal Court. Ms. Cohen earned a master's degree in Counseling from Seattle University and a post-graduate certificate in Life Care Planning from the University of Florida. She holds national certifications in Rehabilitation Counseling, Disability Management, Case Management, and Life Care Planning. In her non-working hours, Ms. Cohen enjoys ice skating, and playing with her four dogs.
- ❖ Todd Gendreau has been with Strategic Consulting Services since November 2002 and is a co-owner of the company. Todd has 23 years of experience as a vocational rehabilitation counselor providing vocational evaluations and expert witness services in workers compensation, personal injury/litigation and vocational expert testimony for the Social Security Administration. Todd has a Master of Science Degree in Rehabilitation Counseling from San Diego State University. He is nationally certified as a Rehabilitation Counselor (CRC), a Disability Management Specialist (CDMS) and is diplomate with the American Board of Vocational Experts (ABVE/d). He is a registered vocational rehabilitation counselor with the Washington State Department of Labor and Industries, an approved vocational rehabilitation Counselor with the US Department of Labor, Office of Worker's Compensation Programs and US Department of Veteran's Affairs, an approved vocational expert with the Social Security Administration and a formally licensed vocational rehabilitation counselor with the State of Utah Department of Commerce.

Todd has mentored and supervised new counselors coming into the field of vocational rehabilitation and has been actively involved in advisory groups, committees, pilot projects and legislative efforts, both locally and nationally.

Todd is a member of several professional organizations, including Professionals in Worker's Compensation where he served as a board member from 2011-2017. He has been a member of the International Association of Rehabilitation Professionals (IARP) since 1997 and served on the Board of the Washington State Chapter of IARP from 2004-2009, including as Chapter President in 2006. He is a current board member for IARP's Social Security Vocational Expert Section.