Member National Academy of Elder Law Attorneys
**Certified Elder Law Attorney by the National Elder Law Foundation

Member Special Needs Trust Alliance
www.specialneedsalliance.com

LAW OFFICES OF BRADLEY J. FRIGON, LLC

ATTORNEYS AT LAW

Bradley J. Frigon, JD, LLM (Tax), CELA**
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Admitted in Colorado and Kansas

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Bryan C. Benbow, JD, LLM
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Bradley J. Frigon, JD, LLM (Tax), CELA, CAP

EDUCATION

University of Denver, Denver, Colorado, Master of Law in Taxation (LLM), 1982
Washburn University School of Law, Topeka, Kansas, Juris Doctor (JD), 1981
University of Kansas, Lawrence, Kansas, Bachelor of Arts (BA), 1978

EXERIENCE

Owner of Law Offices of Bradley J. Frigon, LLC, 2001 to present.

Adjunct Professor of Law, Stetson University College of Law in the Masters of Elder Law Program, 2010 to present.

Principal – Practical Planning Systems; A HotDocs Estate Planning System, 2010 to 2011.

AREAS OF PRACTICE

Trust and estate matters, including probate, trust administration and probate litigation, simple and complex wills and trusts, financial power of attorney documents and advanced medical directives, elder law advice from protecting your assets from nursing home costs to guardian and conservator matters. We are nationally recognized for our expertise in special needs planning and tax matters. We offer consulting services to attorneys and other professionals on public benefit and tax issues related to personal injury settlements including Medicare set aside , first party special needs trusts, Medicare claims , Medicaid liens and qualified settlement funds.

EXPERT WITNESS

Dunlap vs, T.A.W., Inc, Case No.CIV. 08-385-D, United States District Court, Western District Oklahoma.

In the Matter of the Trusts Created by the Will of Dodds L. Buchanan, 05 PR 625, Boulder County District Court.

PROFESSIONAL AFFILIATIONS

National Academy of Elder Law Attorneys.
Colorado Bar Association.
Arapahoe County Bar Association.
Kansas Bar Association.
Special Needs Alliance.
Vice-President, National Academy of Elder Law Attorneys, 2012-2013.
Treasurer, National Academy of Elder Law Attorneys, 2011-2012.
Secretary, National Academy of Elder Law Attorneys, 2010-2011.
Treasurer, Special Needs Alliance, 2010, 2011, 2012.
Board of Directors, Special Needs Alliance, March 2009 to Present.
Board of Directors National Academy of Elder Law Attorneys, 2006 to Present.
Chair of Program and Education Committee, National Academy of Elder Law Attorneys, 2009-2011.
Chair of Advanced Elder Law Institute, National Academy of Elder Law Attorneys, 2008.
Executive Committee, Taxation Section, Kansas Bar Association.
Fee Dispute Resolution Committee, Kansas Bar Association.
Fellow, Kansas Bar Association.
Board of Directors, Colorado Fund for Peoples with Disabilities, 2010 to Present.
Appointed by Governor to Colorado Advisory Council for People with Disabilities, 2010-2011.

PROFESSIONAL RATINGS

SuperLawyer, selected 2012.
Martindale Hubbell, rated AV Preeminent 5.0 out of 5.0.
Avvo rated "10" for superb professional conduct and experiences.

STATE LICENSES

State of Colorado, Attorney registration number 27883
State of Kansas, Supreme Court Registration number 11032

CERTIFICATIONS

Certified Elder Law Attorney (CELA) by the National Elder Law Foundation
Registered Investment Advisor, Series 7 and Series 65
Council of Advance Practitioners (CAP), National Academy of Elder Law Attorneys

PUBLICATIONS

Protecting Assets for a Child with Disabilities, Bifocal, Journal of the American Bar Association Commission on Aging and the Law, Vol 22, No. 4, March-April 2012.
Protecting Assets for a Child with Disabilities, published by SpecialNeeds.com, February 2012.

Fundamentals of Special Needs Trusts, by Stuart D. Zimring, Rebecca C. Morgan and Bradley J. Frigon (Matthew Bender, 2012).
2011 Elder Law in Colorado 4th Edition, June 2011, Managing Editors John C. Campbell and D. Wayne Stewart. CBA-CLE Books. Contributing author Bradley J. Frigon.
Fundamentals of Special Needs Trusts, by Stuart D. Zimring, Rebecca C. Morgan and Bradley J. Frigon (Matthew Bender, 2009)
Are You Ready for Carryover Basis Rules?, Elder Law Answers, August 2009; The ElderLaw Report, vol. XXI, number 2, September 2009
Which Special Needs Trust, When and Why?, Bradley J. Frigon and W. Eric Kuhn, NAELA Journal, 2009, vol. 5, number 1
Special Needs Trusts and Individual Retirement Accounts, Elder Law Advisor, June 2007
Amendments to Medicare Secondary Payer Statute: Broader Authority for Government Recovery, The Colorado Lawyer, Colorado Lawyer, March 2005.
Another Arrow in the Quiver: Understanding the Tax Rules that Apply to Capital Gains and Qualifying Dividends, NAELA Quarterly, Fall 2004.
New Case Limits Government Recovery under the Medicare Secondary Payer Statute, NAELA E-Bulletin, March 4, 2003.
Tax Basis Rules, Elder Advisor, The Journal of Elder Law and Post-Retirement Planning, Marquette University Law School, Spring 2003.
Tax Rules Relating to the Sale of a Principal Residence, Elder's Advisor, The Journal of Elder Law and Post-Retirement Planning, Marquette University Law School, Spring 2002.
New Proposed Regulations on Sale of Principal Residence, NAELA News, April 2001,
Taxation of Damage Awards, Appendix M, Volume 7 and 8 Colorado Practice Series, West Publishing Company, 2000.
Taxation of Disability Trusts, Research Institute of America, Practice Alert, June 1998.

SEMINARS AND PRESENTATIONS

"Medicare Secondary Payor/Medicare Set Aside," Colorado Defense Lawyers Annual Seminar, Crested Butte, Colorado. July 26-27, 2012.

"Medicare Set Aside Trusts," ElderCounsel National Symposium Planning for the Generations, Denver, Colorado. July 19, 2012.

"Special Needs Trusts: What You Need to Know," Depression and Bi-polar Support Alliance, St. Luke's United Methodist Church, 8817 S. Broadway, Highlands Ranch, CO. March 21, 2012, 6:30 p.m. to 8:00 p.m.

"Drafting and Using the Special Needs Trust," Washington State Bar Association - Credit Legal Education, WSBA-CLE Conference Center, Seattle Washington, November 28, 2011.

"Employment and Retirement," National Aging and Law Institute, NAELA Advanced Elder Law Bootcamp, Boston Seaport Hotel, Boston, Massachusetts, November 8, 2011.

"Taxation of SNT's" October 20, 2011, and "Drafting a Medicare Set Aside Sub Trust into a SNT" October 21, 2011. 2011 Special Needs Trusts, The National Conference, The DonCeSar Beach Resort, St. Petersburg, Florida.

"How to Select or Replace a Trustee and Important Instructions for the Trustee." September 14, 2011, 7:00 p.m. National Alliance on Mental Illness, Denver, Colorado.

"Financial Report" and "Serving as a NAELA Board of Director; Responsibilities and Insights" 2011 National Academy of Elder Law Board of Directors' Retreat, Seattle, WA. July 15,2011.

"Medicare Set Asides and QSF's (Qualified Settlement Funds)", Wells Fargo Private Bank, Pasadena, CA. Presentation speakers B. Frigon JD, LLM; D. Brand CEO, Medivest; S. Dale, JD, LLM, June 3, 2011. 3 hours MCLE California Bar Association Credit.

"Calculating Estate Tax Liability: 2001-2011 and Beyond," Alliance meeting. February 2011.

"Medicare Set Asides and Qualified Settlement Funds," Seminar presented to Peck and Bloom Law Firm, Chicago, IL. November 2010.

"Medicare Claims, Medicaid Leins and MSA Issues"and "How to Develop and Implement a Financial Plan," 2010 Special Needs Trust National Conference, Don CeSar Beach Resort, St., Pete Beach FL. October 2010.

"Tax Issues Related to Special Needs Trusts," presented to Tampa Bay Estate Planning Council, Tampa, FL. October 2010.

"Medicare's Interest in a Personal Injury Award: What Elder Law Attorneys Should Know About Medicare Set-Aside Requirements," NAELA Telephonic Seminar. October 2010.

"Medicare's Interest in a Personal Injury Settlement: What Every Elder Law Attorney Needs to Know About Medicare Set Aside Requirements and Medicare Secondary Payer Rules," Colorado Elder Law Conference, Beaver Run Resort and Conference Center, Breckenridge, CO. August 2010.

"Medicare Set Aside Considerations Critical Issues in Personal Injury," NAELA Board Retreat, Los Angeles, CA, July 2010.

"Estate Tax Update," presented to Lighthouse Financial, Broomfield, CO, May 2010.

"Advanced Tax Planning with Special Needs Trust", NAELA Annual Program, Orlando, Fl, May 2010**.**

"Retirement Planning", Advanced Elder Law Review Course, Orlando, Fl, May 2010.

“Strategic Trusts for Elderly and Disabled Clients”, Colorado Bar Association, March 2010.

“Special Needs Planning for Wealthy Families”, Wealth Strategies Laureate Gathering, San Diego, CA, February 2010.

“The Battle Between Special Needs Trusts, Qualified Retirement Plans and Tax Rules”, 2010 Changes and Trends Affecting Special Needs Trusts, University of Texas School of Law, Austin, TX, February 2010.

“2010 Estate Tax Update”, “Taxation of Special Needs Trusts”, and “How To Leave Retirement Benefits to a Trust”, Utah Elder Law Conference, Salt Lake City, UT, December 2009

“Medicare Set Aside Update”, Special Needs Alliance Fall Meeting, St. Petersburg, FL, October 2009

“Selected Income Tax Issues for the Elder Law and Special Needs Law Practitioner”, Colorado Bar Association-CLE Elder Law Retreat, Breckenridge, CO, October 2009

“Special Needs Planning for Wealthy Families”, Chicago Wealth Counsel: Planning for the Generations Symposium, Chicago, IL, August 2009

“Tax Planning and Planned Giving in a Special Needs Trust”, National Alliance on Mental Illness National Convention, San Francisco, CA, July 2009

“Special Needs Trusts Part II”, ALI-ABA Telephonic Conference, June 2009

“Medicaid and Special Needs Trusts”, Colorado Bar Association Estate Planning Retreat, Snowmass, CO, June 2009

“The Battle Between Special Needs Trusts, Qualified Retirement Accounts and Tax Rules”, NAELA Summer Special Needs Program, Phoenix, AZ, May 2009

“How to Leave Retirement Benefits to a Trust”, NAELA Telephonic Training Program, May 2009

“Legal Issues and Documents Related to Senior Fraud, Abuse and Neglect”, Highlands Ranch, CO, April 2009

“Special Needs Trust Tax Update”, Special Needs Alliance Spring Meeting, New Orleans, LA, March 2009

“Avoiding Liability and Adding Value: What Every Personal Injury Attorney and Estate Planning Attorney Must Know About Special Needs Trusts,” ALI-ABA Webcast Seminar, Special Needs Trusts: What Every Personal Injury Attorney and Estate Planning Attorney Must Know, February 2009

"Recovering for Personal Injury: Successful End or Just the Beginning? Medicare's Interest in a Personal Injury Settlement," ALI-ABA Webcast Seminar, Medicaid Set Aside Trusts: Critical Issues Surrounding Personal Injury, December 2008.

Colorado Elder Care, Colorado Society of Certified Public Accounts, annual course sponsored by the Colorado Society of Certified Public Accountants

"Special Needs Trust Basics," Special Needs Trusts X, Stetson University College of Law, St. Petersburg, Florida, October 2008

"Special Needs Trusts & Retirement Accounts," National Academy of Elder Law Attorneys, Memphis, Tennessee, November, 2007

"Taxes, SNTS and Retirement Accounts," Special Needs Trust IX, Stetson University College of Law, St. Petersburg, Florida, October 2007

"Which SNT, When and Why," Special Needs Trust IX, Stetson University College of Law, St. Petersburg, Florida, October 2007

"Which SNTs, When and Why," National Association of Structured Settlement Brokers, Tampa, Florida, October 2007

"How to Market to an Elder Law Attorney," National Association of Home Care Providers, Denver, Colorado, October 2007

"Special Needs Trusts and Retirement Accounts," Elder Law Conference, State Bar of Georgia, Atlanta, Georgia, April 2007

Special Needs Trust Administration Review Course presentation, Wealth Counsel, Orlando, Florida, February 2007

"Special Needs Trusts and Retirement Plans," Special Needs Trust VIII, Stetson University College of Law, St. Petersburg, Florida, October 2006

Special Needs Trust Administration Review Course presentation, Wealth Counsel, San Diego, California, May 2006

"Medicare MSP Changes," Special Needs Trust VI, Stetson University College of Law, St. Petersburg, Florida, October 2004

"Medicare Set-Aside Trusts," Arizona Chapter of NAELA, First Annual Symposium, Phoenix, Arizona, September 2004

"Elder Law in Colorado," National Business Institute, Denver, Colorado, November, 2003

“Special Needs Trusts,” National Business Institute, Denver, Colorado, July 2003

“Advanced Elder Law,” National Business Institute, Denver, Colorado, March 2003

“Family Limited Partnerships in Colorado,” National Business Institute, Denver, Colorado, November 2002

“Tax Basis Rules,” National Academy of Elder Law Attorney, Advanced Elder Law Institute, Albuquerque, New Mexico, November 2002

“The Preservation of Medicare Benefits in a Workers' Compensation Settlement,” Special Needs Trust Alliance, Stetson University Law School, St. Petersburg, Florida, October 2002

“Building a Winning Team Between the Geriatric Care Manager and the Elder Law Attorney,” National Association of Professional Care Managers, Denver, Colorado, October 2002

“Paying for the Cost of Long Term Care,” Colorado Financial Planning Association, Denver, Colorado, August 2002

“Colorado Medicare and Medicaid Benefits and Eligibility for the Elderly,” Half Moon, LLC, Denver, Colorado, June 2002

“Tax Update,” National Academy of Elder Law Attorney Symposium, Baltimore, Maryland, April 2002

“Elder Care in Colorado,” Legal and Financial Issues, National Business Institute, Denver, Colorado, December 2001

“Review of Estate Tax Changes,” Advanced Elder Law Institute, National Academy of Elder Law Attorneys, St. Louis, Mo, November 2001

“Legislative Update,” National Academy of Elder Law Attorney Symposium, Vancouver, Canada, April 2001

“Death Tax Elimination Act of 2000,” Advanced Elder Law Institute, National Academy of Elder Law Attorneys, Colorado Springs, Co, November 2000

“Medicare Set Aside Trusts,” National Academy of Elder Law Attorneys Annual Meeting, Chicago, IL, November 1999

“Structuring Attorney Fees,” National Academy of Elder Law Attorneys Annual Meeting, Chicago, IL, November 1999

Numerous seminars to public on tax, estate planning, retirement planning and Medicaid planning.