



# SENIOR LAW DAY 2023

**“Expect the Unexpected -  
When Life Throws You a Curveball”**

**Saturday, June 3, 2023  
8:30 am – Registration  
Program – 9:00 am – 12:30 pm**

**First Baptist Church of Alexandria  
2932 King Street  
Alexandria, VA**



*City of Alexandria, Virginia*  
301 King Street, Suite 2300  
Alexandria, Virginia 22314



Justin M. Wilson  
Mayor

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June 3, 2023

Senior Services of Alexandria & Alexandria Bar Association, for  
Senior Law Day 2023

Good morning, attendees:

Welcome to the 2023 Annual Senior Law Day Event.

I also wish to offer congratulations to Senior Services of Alexandria and the Alexandria Bar Association for once again coordinating such a great and informative happening.

This year's program theme is: "When Life Throws You a Curveball."

And this theme is helpful to all Alexandrians of all ages.

Topics of discussion today range from estate planning to marriages later in life; planning for adult children living at home, and planning for adult children who have special needs; and aging at home versus in an assisted-living community.

Today you will be hearing from representatives of the Alexandria Bar Association, the Department of Community and Human Services, Caring Considerations, and Signature Estate & Investment Advisors.

These are but a few of the areas of discussion the assembled experts will be able to help you navigate today. Please take advantage of what they have to offer.

Finally, many thanks to First Baptist Church for hosting Senior Law Day this year, and availing their resources for such a helpful occasion.

Once again, welcome to everyone, and best wishes.

Sincerely,

Justin M. Wilson  
Mayor

## Welcome to Senior Law Day! "Expect the Unexpected – When Life Throws you a Curveball"

The Alexandria Bar Association (ABA) and Senior Services of Alexandria (SSA) present the twelfth annual program to inform the Alexandria community about legal issues that might be important to the needs of older adults. This program, conceived by the Senior Lawyers Conference of the Virginia State Bar, has been well-received by the Alexandria community since its inception.

Over the past several years, ABA and SSA have worked to create a network of resources, referrals, and support services for seniors in our community, their adult children, caregivers, neighbors, and friends. Our goal is to ensure that all Alexandria residents become aware of the many services available. This year's presenters will cover the basics of estate planning, late marriage and gray divorce, scenarios involving adult children, and housing options as you age. For estate planning, the panelists will discuss the basic estate planning documents you should have in place to cover both the expected and unexpected, including Advance Medical Directives, General Powers of Attorney, and Last Wills and Testaments. For those of you marrying later in life, that panel will discuss some tools for asset protection (especially when there are children from prior relationships), what those tools can protect and when, and considerations for caring for each other financially. They will also discuss the topic of divorcing later in life, and the financial implications of the same.

In the coming months, SSA will unveil its 2023-24 schedule of monthly in-depth programs to address the needs of older adults. We hope you'll take advantage of these programs and the resources provided by our sponsors today and call upon them as you plan for the future.

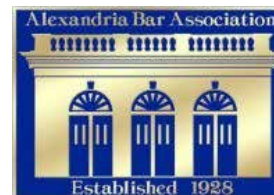
We thank you for coming today and look forward to your questions and comments! Please understand that the lawyers and other experts who are participating in our panels and resource tables today cannot answer specific questions related to your individual legal situation, but are happy to assist you personally after the program.

**2023 Senior Law Day Program**  
**Senior Law Day: “Expect the Unexpected:  
When Life Throws you a Curveball”**

- 8:30-8:50 a.m.      *Registration & Continental Breakfast  
Visit with Resource Sponsors*
- 9:00 – 9:10 a.m.      **Opening Remarks and Welcome to the Conference**  
G. Christopher Wright, Esq., Chair, Board of Directors,  
Senior Services of Alexandria
- 9:10 - 9:15 a.m.      **Introduction of Panels**  
Xue Connelly, Esq., Wade, Grimes, Friedman,  
Meinken & Leischner, PLLC
- Panel Presentations**
- 9:15 – 10:00 a.m.      **Late Marriage and Gray Divorce and  
the Financial Implications**  
Xue Connelly, Esq., Wade, Grimes, Friedman,  
Meinken & Leischner, PLLC  
Rebecca Wade, Esq., Wade, Grimes, Friedman,  
Meinken & Leischner, PLLC  
Laurie Denker MacNaughton, Atlantic Coast  
Mortgage
- 10:00 – 10:45 a.m.      **The Importance of Estate Planning**  
Gretchyn Meinken, Esq., Wade, Grimes,  
Friedman, Meinken & Leischner, PLLC  
Natalie Page, Esq., Life & Estate Planning Law  
Center, PLLC
- 10:45 – 11:00 a.m.      **Stretch Break**

**2023 Senior Law Day Program**  
**Senior Law Day: “Expect the Unexpected:  
When Life Throws you a Curveball”**

- 11:05-11:45 a.m.      **Adult Children**  
Rachel Baer, Esq., Counsel and Director of New  
Client Services Family, Commonwealth  
Community Trust  
Xue Connelly, Esq., Wade, Grimes, Friedman,  
Meinken & Leischner, PLLC  
Stephanie Puszka, Dept. of Community &  
Human Services, City of Alexandria
- 11:45 – 12:20      **Housing Options as you Age**  
Elizabeth Crego, Esq., Legal Services of  
Northern Virginia  
Heidi Garvis, Co-Founder/Owner – Caring  
Considerations  
Arvette Reid, Marketing and Outreach Director  
Signature Estate & Investment Advisors
- 12:20-12:30 p.m.      **Closing Remarks**  
Colleen Haddow, Esq., President, Alexandria  
Bar Association



## Today's Presenters

**Rachel Baer, Esq., Commonwealth Community Trust** – a nationwide non-profit pooled trust administrator with the mission of enriching the lives of individuals who are vulnerable, injured, or have special needs. 804-740-6930, [www.trustCCT.org](http://www.trustCCT.org)

**Xue Connelly, Esq., Wade, Grimes, Friedman, Meinken & Leischner, PLLC** – Ms. Connelly focuses her practice on estate planning, probate and estate administration, estate litigation, adult guardianship and conservatorship, and bankruptcy. 703-836-9030, [www.oldtownlawyers.com](http://www.oldtownlawyers.com)

**Elizabeth Crego, Esq., Legal Services of Northern Virginia** – We are the largest legal aid organization in Virginia, helping thousands of clients each year in civil legal matters. We partner closely with other legal aid organizations and local bar associations, as well as the courts, to serve the region's low-income and neediest populations. Elizabeth is the Staff Attorney specializing in housing, consumer, and elder law matters in our Alexandria office. 703-778-6800, [www.lsnv.org](http://www.lsnv.org)

**Heidi Garvis, Caring Considerations** – helps older adults to find the right housing and care solutions with long-range planning to prevent crises from occurring and achieve the goals set for themselves. 571-488-9396, [www.caringconsiderations.com](http://www.caringconsiderations.com)

**Laurie Denker MacNaughton, Atlantic Coast Mortgage** – Laurie Denker MacNaughton is in the top 1% of reverse mortgage specialists. She is a frequent guest speaker, and her articles on aging in place have been published in journals nationwide. 703-766-6700, [www.atlanticcoastmortgage.com](http://www.atlanticcoastmortgage.com)

## Today's Presenters (continued)

**Gretchyn Meinken, Esq., Wade, Grimes, Friedman, Meinken & Leischner, PLLC** – Ms. Meinken focuses her practice on estate planning, probate and estate administration, and adult guardianship and conservatorship matters. 703-836-9030, [www.oldtownlawyers.com](http://www.oldtownlawyers.com)

**Natalie Page, Esq., Life & Estate Planning Law Center** – is a boutique law firm serving Northern Virginia families with comprehensive estate planning, estate and trust administration, guardianships and conservatorships, and fiduciary matters. 703-820-3600, [www.lifeandestateplanninglaw.com](http://www.lifeandestateplanninglaw.com)

**Stephanie Puszka** – Stephanie Puszka is the coordinator team lead for the City of Alexandria Department of Community and Human Services. She supports a team that provides case management services for adults with intellectual and developmental disabilities. 703-746-4311, [www.alexandriava.gov/DCHS](http://www.alexandriava.gov/DCHS)

**Arvette M. Reid, Signature Estate & Investment Advisors** – expertise in empowering seniors and their families to work with their financial assets and income to make long-term healthcare and housing plans. 703-940-3000, [www.seia.com](http://www.seia.com)

**Rebecca Wade, Esq., Wade, Grimes, Friedman, Meinken & Leischner, PLLC** – Ms. Wade focuses her practice on family law and criminal defense. 703-836-9030, [www.oldtownlawyers.com](http://www.oldtownlawyers.com)

*Thank you to the following community partners who provided information and hosted resource tables today:*

AARP Virginia

Alexandria Bar Association

Alexandria Division of Aging  
and Adult Services

Alexandria Police Department

Alexandria Sheriff's Office

Alexandria Workforce Development Center

Legal Services of Northern Virginia

Senior Services of Alexandria

**Thank you to these Senior Law Day Event Underwriters. Their generous contributions keep this event free to attendees!**

**AARP Virginia**, 707 E. Main St., Suite 910, Richmond, VA 22312, 703-931-0758, [www.aarp.org](http://www.aarp.org)

**Aging Life Care Association**, P.O. Box 3634, Merrifield, VA 22116, 571-488-9396 [www.caringconsiderations.com](http://www.caringconsiderations.com)

**Capital City Nurses**, 8401 Connecticut Ave., Ste. 1030, Chevy Chase, MD 20815, 703-539-6029, [capitalcitynurses.com](http://capitalcitynurses.com)

**City of Alexandria**, 703-549-5999, [www.alexandriava.gov](http://www.alexandriava.gov)

**E lance at Alexandria Community, Elance at West End Community, Paul Spring Community**, [www.rui.net](http://www.rui.net)

**Everly-Wheatley Funeral Home and Crematory**, 1500 West Braddock Rd., Alexandria, VA 22302, 703-998-9200, [www.everlywheatley.com](http://www.everlywheatley.com)

**Goodwin Living**, 4800 Fillmore Street, Alexandria, VA 22311, 703-824-1000, [goodwinliving.org](http://goodwinliving.org)

**The Landing Alexandria** 2620 Main Line Blvd, Alexandria, VA, (703)-577-6011, [the-elitecollection.com](http://the-elitecollection.com)

**Life & Estate Planning Law Center, PLLC**, 1225 Martha Custis Dr., Suite 103, Alexandria, VA 22302, 703-820-3600, [www.LifeandEstatePlanningLaw.com](http://www.LifeandEstatePlanningLaw.com)

**Shannon & Wright, LLP**, 124 S. Royal Street, Alexandria, VA 22314, 571-620-1930, [shannonwright.law](http://shannonwright.law)

**United Healthcare Medicare** 612-383-3463, [www.uhc.com](http://www.uhc.com)

**Wade, Grimes, Friedman, Meinken & Leischner PLLC**, 616 N. Washington Street, Alexandria, VA 22314, 703-836-9030, [www.oldtownlawyers.com](http://www.oldtownlawyers.com)

**Woodbine Rehabilitation and Health Care Center**, 2729 King St., Alexandria, VA 22302, 703-836-8838, Donna Shaw, [www.woodbinerehab.com](http://www.woodbinerehab.com)



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Everly-Wheatley is honored to be a sponsor of the 2023 Senior Law Day: “Expect the Unexpected – When Life Throws You a Curve Ball”. The main theme is planning and when it comes to the inevitable, planning is especially important.

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3. Make pre-arrangements. They can be as simple as just getting your wishes written down on paper at our Funeral Home. You can also give your family the gift of fully pre-funding your funeral or cremation.

Please feel free to call us to assist you in planning.

**Jim Zalewski, Managing Partner**



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**Natalie T. Page, Esq.**

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Wade, Grimes, Friedman, Meinken & Leischner, PLLC is an Alexandria legal counsel team with broad experience in providing solutions to the legal issues you face. Our firm has been rated AV-Preeminent by Martindale-Hubbell, and our attorneys have been recognized by Best Law Firms, Best Lawyers, Super Lawyers, Washingtonian Top Lawyers, Northern Virginia Magazine Top Lawyers, and Virginia Business Magazine's Legal Elite.



Foster B. Friedman, Gretchyn G. Meinken, Xue Connelly, and Rachel Davis are members of the firm's estate planning and estate and trust administration practice. They take a customized, comprehensive approach to estate planning, tailoring estate plans to meet the individual needs of their clients. Mr. Friedman, Ms. Meinken, Ms. Connelly, and Ms. Davis understand that advanced planning can be difficult and emotional. They'll work closely with you on the prudent and practical decisions you need to make for the management of your estate in the event of your incapacity, and the smooth transfer of property in the event of your death. They guide clients through the process to ensure compliance with the law and estate documents. Additionally, they can aid in the appointment of guardians and conservators for those clients with family members in need of assistance with personal and financial decision-making.



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Thank you all for coming today. This program was created by the Senior Lawyers Conference of the Virginia State Bar to advise older adults of their rights and the importance of estate planning and long-term-care planning. The Alexandria Bar Association and Senior Services of Alexandria partnered in 2011 to produce the first Senior Law Day in Alexandria. We ask that you join us in extending heartfelt thanks to the following, who helped make the event possible:

Our presenters, for donating their time and expertise to this event

First Baptist Church of Alexandria for making this wonderful space available to the community

MaryAnne Beatty, Lindsay Hemphill, Marshall Hespe, Jane Marcus and Margaret Shetler of Senior Services of Alexandria, who managed registration and publicity

Jay Thomas of AlphaGraphics, for arranging the printing of the programs

All of the sponsors of Senior Law Day who supported the event financially and provided information to attendees during this year's Senior Law Day event, *"Expect the Unexpected – When Life Throws you a Curveball."*

Our Community Partners who came today to share valuable community resources

AND

### **The Law Day Planning Committee:**

Mary Lee Anderson, Rachel Baer, MaryAnne Beatty, Elizabeth Crego, Jane Marcus, Gretchyn Meinken, Natalie Page, and Xue Connelly

Thank you to the Senior Lawyers Conference of the Virginia State Bar for providing complimentary copies of the *Senior Citizens Handbook* for today's Senior Law Day attendees.

Thank you to the *Positive-Aging Sourcebook* for providing copies of the latest *Guide to Retirement Sourcebook*.

## Senior Law Day is produced by:

**The Alexandria Bar Association**, which provides a **Lawyer Referral Service**, a legal consultation service. For a fee of \$55, paid to the service in advance, clients receive a referral for a 30-minute appointment with an Alexandria Bar Association attorney who works in the client's particular area of need. Appointments are usually scheduled within 1-3 days of the first contact from the client and take place at the attorney's office. Begin your questionnaire by visiting <https://alexandria.barlrs.com/> and find the right lawyer or in person at the Alexandria Courthouse, 520 King Street, Room 202, Monday – Thursday from 9:00 a.m. – 3:00 p.m.

**Senior Services of Alexandria (SSA)**, a nonprofit organization that has as its mission, “to foster independence and self-sufficiency, enabling seniors within the City of Alexandria to age with dignity.” SSA operates a Senior Nutrition program including Meals on Wheels and Groceries-to-Go delivery programs, handles DOT transportation reservations for the City, and presents educational programs including a monthly speaker series, the Senior Academy, and the Senior Ambassador program. SSA and the Animal Welfare League of Alexandria operate the Animeals-on-Wheels program, providing food for pets of low-income seniors. SSA's Friendly Visitor Program matches volunteers with seniors for weekly visits, enhancing connections to the community. If you would like to join the effort to enhance the lives of seniors in our community, please contact SSA at [www.seniorservicesalex.org](http://www.seniorservicesalex.org) or call (703) 836-4414.

The logo for Senior Services of Alexandria features the words "Senior Services" in a large, elegant serif font. A thick, dark blue wavy line arches over the text, starting under "Senior" and ending under "Services". Below "Senior Services", the words "OF ALEXANDRIA" are written in a smaller, all-caps, sans-serif font.

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