

# JASON D. LAZARUS, J.D., LL.M., MSCC

## CURRICULUM VITAE

### LEGAL/SETTLEMENT PLANNING RELATED EMPLOYMENT (1995 – PRESENT)

**Special Needs Law Firm**, Orlando, Florida.

*Managing Partner and founding member of the firm*

The firm handles special needs trusts, public benefit preservation issues, lien resolution, settlement planning consultation and trusts. The firm also handles 468B Qualified Settlement Funds as well as Medicare Set Aside advisement.

**John Staunton, P.A.**, Clearwater, Florida.

*Of Counsel*

The firm handled special needs trusts, public benefit preservation issues, lien resolution, guardianship, probate, estates and trusts. The firm also handled 468B Qualified Settlement Funds as well as Medicare Set Aside advisement.

**Attorneys Settlement Law Group**, Tampa, Florida

*Of Counsel and founding member of the firm*

The firm handled special needs trusts, public benefit preservation issues, guardianship, probate, estates and trusts. The firm also handled 468B Qualified Settlement Funds.

**Hurley, Rogner, Miller, Cox & Warranch**, Orlando, Florida.

Associate participating in all phases of workers' compensation litigation.

**Adams, Hill, Reis, Adams, Hall & Schieffelin**, Orlando, Florida.

Associate participating in all phases of medical malpractice litigation.

**United States District Court**, Tallahassee, Florida.

Judicial Intern/Student Law Clerk to the Honorable William Stafford.

**Rumberger, Kirk & Caldwell**, Orlando, Florida.

Law clerk assisting in insurance defense matters.

### PROFESSIONAL CERTIFICATION & LICENSURE

**Florida Bar** (Admitted September 24, 1996)

**Medicare Set Aside Consultant – Certified** (International Commission on Health Care Certification, January 2011)

**Certified Structured Settlement Consultant** (The University of Notre Dame/National Structured Settlement Trade Association September 2000)

**Special Care Planner** (The American College 2006)

**State of Florida Life, Health & Variable Annuity License**

## **PROFESSIONAL AFFILIATIONS**

**American Association for Justice**

**Academy of Special Needs Planners**

**Florida Justice Association** (Eagle Member)

**National Academy of Elder Law Attorneys**

**National Alliance of Medicare Set-Aside Professionals**

**Society of Settlement Planners** (President 2010-2011)

## **CONTINUING LEGAL EDUCATION PRESENTATIONS**

### **NBI – Medicare Set Asides in Personal Injury Litigation Series**

Ethical Issues at Settlement & Protecting Supplemental Security Income and Medicaid Eligibility: Special Needs Trusts

### **FJA Workhorse Seminar**

Lien Resolution, Set-Aside Trusts, Guardian ad Litem and More – Steps and Procedures Which Need to be Taken in Virtually All Cases Well in Advance of Mediation in Order to Ensure a Higher Likelihood of Maximizing the Result for your Client.

### **FJA Collateral Sources Seminar**

Medicare: Conditional Payments & Set Aside Requirements

### **Medicare/Medicaid Lien Seminar – Escambia – Santa Rosa Bar Association**

Medicare Conditional Payments & Set Asides/Medicaid & SSI

### **Terrell Hogan Instant CLE**

Understanding Medicare Set Asides and their Impact on Negotiating Cases Involving Medicare Beneficiaries

### **AAJ's Medicare Set Aside Trusts – Post Settlement Issues Seminar**

Medicare: Conditional Payments & Set Aside Requirements

### **Workers Compensation Forum**

Understanding the Special Needs Comp Case, What You Should Know

**Mass Torts Made Perfect**

Understanding Settlement Planning Issues

**Palm Beach County Justice Association**

Protecting Public Benefits for Special Needs Clients

**Florida Justice Association – Workhorse Seminar**

Settlement Trusts & How to Integrate Structured Settlements

**Southern Trial Lawyers Association**

Settlement Ethics & Settlement Trusts

**Florida Justice Association – Winter Meeting**

Settlement Trusts & Tax Deferral of Attorney Fees

**Mass Torts Made Perfect**

Ethical & Malpractice Concerns: Protect the Client, Protect Yourself at Settlement

**Academy of Florida Trial Lawyers**

Financing the Settlement: What you Should Understand When Negotiating a Structured Settlement

**Florida Conference of Circuit Judges**

A Primer on Structured Settlements

**Lorman**

Protecting the Special Needs Clients: Myths and Facts

**Academy of Florida Trial Lawyers**

Attorney Fee Structures: Tax Deferred Annuities

**Academy of Florida Trial Lawyers**

Protecting the Special Needs Clients: Myths and Facts

**Central Florida Trial Lawyers Association**

Protecting the Special Needs Clients: Myths and Facts

**Mass Torts Made Perfect**

Protecting the Special Needs Clients: Myths and Facts

**Palm Beach County Trial Lawyers Association**

Protecting the Special Needs Clients: Myths and Facts

**Lorman**

Special Needs Trusts, Structured Settlements and Liens in Florida

**Florida Roundtable**

Ethical & Malpractice Issues: Advisement Concerning Financial Options at Settlement

**Mass Torts Made Perfect**

Ethical & Malpractice Issues: Advisement Concerning Financial Options at Settlement

**Academy of Florida Trial Lawyers**

Structured Settlements: Areas of Concern for the Personal Injury Practitioner

**Central Florida Trial Lawyers Association**

Structured Settlements: Areas of Concern for the Personal Injury Practitioner

**Workers' Compensation Section of the Florida Bar**

Structured Settlements: Areas of Concern for the Workers' Compensation Practitioner

**Orange County Bar Association, Workers' Compensation Section**

Structured Settlements: Areas of Concern for the Workers' Compensation Practitioner

**PUBLICATIONS**

**Medicare Set Asides – How are they Administered?**, *JUSTLAW*, Volume 3, Issue 2 (4<sup>th</sup> Quarter 2011).

**Medicare Myths: What Every Trial Lawyer Should Know about the MSP & Liability Medicare Set Asides**, *Florida Bar Journal*, Volume 84, No. 9 (November 2010).

**Medicare Myths: What Every Trial Lawyer Should Know about the MSP & Liability Medicare Set Asides**, *Florida Bar Trial Lawyers Section - The Advocate*, Volume XXXIX, No. 4 (Summer 2010).

**Medicare's New Reporting Rules: Confusion Reigns**, *The ElderLaw Report*, Volume XXI, Number 11 (June 2010).

**How Medicaid Coordinates with Medicare for Those that Are Dual Eligible**, *JUSTLAW*, Volume 2, Issue 1 (May 2010).

**How to Protect Aged Injury Victims: Implications for Trial Lawyers**, *NAELA Journal*, Volume 4, Number 2 (November 2008).

**An Examination of the Medicare Secondary Payer Act and Set Aside Obligations**, *The ElderLaw Report*, Volume XX, Number 4 (November 2008).

**What is MMSEA?**, *Florida Justice Association Journal*, Number 528 (March/April 2008)

**A Primer for the Parents of a Child with Special Needs on Financial & Legal Options when a Personal Injury Case Settles**, *Exceptional Parent Magazine*, Volume 37, Issue 11 (November 2007)

**Protect Public Benefits for Your Special-Needs Client**, ATLA's Trial Magazine

Volume 41, No. 6 (June 2005)

**Discussing Financial Options at Settlement: Ethical Obligations and Liability,** *Academy of Florida Trial Lawyers Journal* Number 491 (March 2004).

**Solving the Financial “Pinch” of Medicare Set Asides,** *News & 440 Report* Volume XXV, No.2 (Fall 2003).

**Tax Problems? What Every Employment Lawyer Should Know About Structured Settlements,** *The Employee Advocate* (Spring 2003).

**Estate Taxes on Structured Settlements: A Springing Legal Malpractice Trap for Personal Injury Lawyers,** *Academy of Florida Trial Lawyers Journal* Number 478 (October 2002).

**Structured Settlements: The Impact of Substandard Age Ratings,** *News & 440 Report* Volume XXIII, No.2 (Summer 2001).

**Maximizing Settlement Dollars in Workers’ Compensation Claims,** *News & 440 Report* Volume XXII, No. 1 (Spring 2000) .

**Structured Settlements: How the Plaintiff Should Take Control and Why,** *Central Florida Trial Lawyers Association Litigator* (January 2000).

**The North River Insurance Co v. Wuelling: First District Court of Appeal Recedes from Waffle House,** *Fl. Bar Journal* Volume LXXI, NO. 7 (August 1997).

**Xin-Chang Zhang v. Slattery: An Illustration of the Need for a Change in the United States Immigration Laws to Provide Appropriate Consideration of Asylum Claims by Chinese Nationals Fleeing China’s Coercive Population Control,** 5 *Journal of Transnational Law & Policy* 65 (1996).

## EDUCATION

**Legal:** Stetson University College of Law, St. Petersburg Florida.  
**LL.M. in Elder Law.** Graduated with *Distinction*, May 2010.

Florida State University College of Law, Tallahassee, Florida.  
**Juris Doctorate.** Graduated *Magna Cum Laude*, May 1996.

**Undergraduate:** University of Central Florida, Orlando, Florida.  
**Bachelor of Arts in Psychology.** Graduated *Cum Laude*, August 1992.