

MEDICAID PLANNING Update

Including Sample Irrevocable Trusts(S&J) and P/Care Contract

Materials Only - \$175.00 - 10/18 Update (1000+pgs)

Friday, March 15, 2019 – Randolph: Lantana 9-1 (.4 CEU)

Friday, April 26, 2019 – Andover: Marriott Courtyard 9-1 (.4 CEU)

Friday, May 31, 2019 – Natick: Hampton Inn 9-1 (.4 CEU)

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Every year Medicaid planning and the ability to obtain MassHealth benefits become more difficult. The statute and regulations seem clear but case workers continue to identify flaws in Medicaid plans and they are looking for ways to deny benefits not only to irrevocable trusts but to last minute techniques such as the caretaker child exception, use of annuities, transfers to disabled children, and the sole benefit rule.

This program teaches you skills and techniques you need to help your client properly prepare and plan for long-term care as well as explore some last minute techniques to obtain Medicaid eligibility. Lets explore the recent case law, relevant regulatory updates, recent MassHealth challenges from irrevocable trusts to permissible transfer rules, and how best to defend against such challenges. Come and learn what you need to know to get your clients the benefits they need.

- Explore MassHealth’s latest, denying benefits after being approved, and the application of the MAAS cure to this.
- The difference between a look back period and a penalty period and permitted transfers.
- Review of annuity rules for married couples and single folks, what happens when healthy spouse dies prior to sick spouse, and MassHealth challenges to the designated beneficiary rules.
- Whether personal care contracts are permissible and how to draft them effectively.
- The two ways to create life estates, when to use them along with an income, gift and estate tax analysis associated with life estates.
- How to preserve residential and/or elderly property tax exemptions.
- A review of fair hearings and how MassHealth is challenging Medicaid planning techniques, irrevocable trusts, and nominee realty trusts.
- An operational guide to ILOTs along with a gift income and estate tax analysis of these trusts.
- What are countable and non-countable assets.

*Copies and Analysis of Recent Cases *Planning Opportunities * “Ask the Experts” Q&A Session
* **Sample Trust Documents (S&J)** * **Sample P/Care Contract** * **Current Medicaid Numbers**

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Complete the form below and return to The Foundation for Continuing Education at P.O. Box 458, Wenham, MA. 01984, call 978-468-6528 or Fax to 978-468-2573.

___ Buy the Medicaid Survival Guide & Program Materials Only- \$175.00 (1000+ pages)

___ Tuition: \$275.00 includes all Materials (2 or more registrants - \$250.00 each)

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