

**Medicaid Planning for Case Managers:
beyond “the house, the car, and \$1,500.00 for burial”**

Wendy Thornton of Medicaid Matters will present several of the not so well known Medicaid rules used by Elder Law attorneys to help clients qualify for Medicaid. The objective of this presentation is to help inform case managers of options that might be of help to clients who almost qualify for Medicaid/Community Care Programs, as well as those transitioning into long term care facilities. Pros and Cons will also be discussed.

The presentation will include the following:

PM 07-02-20-b: Allowable Transfers
Transferring assets to a disabled child;

PM 07-02-04: Real Property
Pros and Cons of transferring the home to a Spouse, and
Transferring the home to a child, who provided care;

PM 07-02-15-b: Exempt Trusts
“Payback” Trusts for those under 65 year old (non-pooled), and
“Pooled Payback” Trusts for those 65 years old and over;

PM 07-02-17: Annuities
Protecting an asset by turning it into a countable source of income;

PM 07-02-22: Community Spouse Asset Allowance
Using the “annuity rule” to get an increase in the CSAA standard, and
How attorneys get approval for an increase in the CSAA through court proceedings;

PM 08-02-06-k: Loans
Reverse Mortgages: How lump sum distributions could jeopardize Medicaid; and

Record keeping for Medicaid: don’t shred those statements, yet!