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Member New York Bar

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**MEDICAID ASSET PROTECTION
in ESTATE PLANNING**
presented at
ACHIEZER JEWISH HEALTHCARE EXPO - 9.15.19

1. Asset Protection & Estate Planning Documents

Advance Directives - Powers of Attorney; Health Proxies; Living Wills

Last Wills and Testament

Living Trusts (*inter vivos*)

Revocable - Avoiding Probate - "Unprotected"

Irrevocable - Asset Protection (Medicaid) Planning - "Protected"

2. Paying for "Long Term Health Care"

Medicare / HMOs - Very Brief Coverage

Private Pay - Very Expensive

Long Term Care Insurance / New York State Partnership Plan

Medicaid - Home Care or Nursing Home Care;

Eligibility Rules;

Spousal Refusal, Holocaust Reparations and Other Exceptions

3. Real Estate

Protecting Your Property- Life Estate vs. Irrevocable Trust

Selling / Relocating

Housing Issues

Assisted Living

Supported Living (Senior Housing)

4. Estate Administration

Probate vs. Administration - Surrogate's Court

Estate Taxes - New York State and Federal

HAVE A GREAT DAY !