SEMINAR

Medicaid & Healthcare Planning Update 2021

Navigate the always-changing, complex world of Medicaid planning and nursing home residents' rights issues

So, perhaps you are interested in helping your clients obtain Medicaid benefits to pay for their long-term care costs. Or, perhaps you have a client in an assisted living facility or nursing home that is being threatened with eviction, or is being pressured to sign an unfair admission contract. How do you properly advise your elderly clients and their family members in dealing with these complex issues, when the law changes so fast that you haven't yet had time to memorize even the existing Medicaid regulations?

The Federal Medicaid statute and state regulations may seem clear, but elder law practice is truly a trap for the unwary practitioner, with changes to acceptable planning strategies being made randomly and without a formal rule-making process. Challenges to Medicaid planning are not only limited to irrevocable trust denials, but have been expanded by the agency to include challenges to the use of spousal annuities, transfers to disabled children, and estate recovery litigation.

This session teaches you skills and techniques you need to help your clients properly prepare and plan for long-term care, as well as explore some last-minute techniques to obtain Medicaid eligibility. The experts explore recent case law, relevant regulatory updates, and recent MassHealth challenges from irrevocable trusts to annuity rules. Learn how to defend against such challenges in the application and appeal process. Familiarize yourself with the rights bestowed upon residents in nursing homes and assisted living facilities, so that you can help your clients safeguard themselves against unlawful facility admission contracts.

Agenda

- Overview of Basic Medicaid Eligibility Rules and Application Process
- Complete Overview of Permissible Transfer Rules, Last-Minute Techniques to Obtain MassHealth Benefits, and the Latest Challenges to Such Techniques
- Review of the Annuity Rules for Married Couples and Single Individuals, and Discussion of MassHealth's Recent Challenges to Spousal Annuity Beneficiary Designations
- Review of Recent Case Law Concerning Important Developments in the Medicaid Planning World That Every Practitioner Should Be Aware of
- Overview and Discussion of Key Regulations and Issues to Be Aware of in Terms of Ensuring That the Rights of Your Client as a Resident of a Skilled Nursing Facility or Nursing Home Are Being Protected
- "Ask the Experts" Q&A Session

Faculty

Lisa M. Neeley, Esq., *Mirick, O'Connell, DeMallie & Lougee LLP, Worcester,* Chair
Steven M. Cohen, Esq., *Rubin and Rudman LLP, Boston*
Patricia Keane Martin, Esq., *Seegel Lipshutz Lo & Martin, LLP, Wellesley Hills*

Dates & Location

LIVE WEBCAST
Wednesday, June 9, 2021
2:00 pm–5:00 pm

Register at **www.mcle.org**
Program Number: 2200282WBC

REBROADCAST CC
Thursday, June 24, 2021
9:00 am–12:00 noon

Register at **www.mcle.org**
Program Number: 2200282RBC

REBROADCAST CC
Friday, July 2, 2021
9:00 am–12:00 noon

Register at **www.mcle.org**
Program Number: 2200282RB1

ON DEMAND WEBCAST CC
View after Friday, July 2, 2021

Register at **www.mcle.org**
Program Number: 2200282WBA

Tuition *(includes written materials)*

- $245
- $220.50 MCLE Sponsor Members
- $183.75 New Lawyers admitted to law practice after 2018, Pending Admittees, Law Students, and Paralegals

To apply for a need-based scholarship, email scholarships@mcle.org.

Materials

The materials for this program are available *online only* and can be downloaded via the link emailed to you upon registration.

Also, there is no need to take extensive notes. Two weeks after the live webcast, all registrants receive a link to a verbatim transcript of this program.

CLE Credits

Earn up to 3 CLE credits