

EDGENTUS WEBINAR SERIES

COURSE SUMMARY

Course Title: Anatomy of a Medicaid Planning Case: Single Applicant

This 2-hour course takes the student through a standard single individual long-term care Medicaid Planning case from start to approval. This case study course is applicable for practitioners in all states except California.

Learning Objectives:

Through this course you will learn:

- The client intake process and key information to collect.
- Case analysis for an LTC Medicaid asset protection plan for an unmarried applicant.
- How to determine the total spenddown exposure.
- Understanding the Modern Half-a-Loaf concept.
- Using the Gift + Annuity approach to achieve LTC Medicaid eligibility.
- Completing the asset re-structuring to become “otherwise eligible” for LTC Medicaid.
- Filing the Medicaid application to start the penalty period.
- Post-approval issues.

Location: Online Webinar (Zoom Webinar Platform)

Hours: 2

Date: November 17, 2020

Time: 2:00 pm ET – 4:00 pm ET

Presenters: Michael Anthony, JD

Level: Introductory/Basic

Prerequisites: None (Introduction to Medicaid Planning and The Basics of Medicaid Compliant Annuities and Promissory Notes are recommended but not required.)

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COURSE OUTLINE

Anatomy of a Medicaid Planning Case: Single Applicant

Date: Nov. 17, 2020

Time: 2:00 pm ET – 4:00 pm ET

- I. Medicaid Planning for Single Applicants Basics
 - a. What is Medicaid Planning
 - b. What rules allow Medicaid Planning
 - c. How Medicaid Planning can help a single applicant protect assets
- II. Client Intake Process
 - a. Key information
 - b. Basic Analysis
 - c. Determining which assets count towards the spenddown
- III. Determining the LTC Medicaid spenddown exposure
 - a. Determining the Individual Countable Resource Allowance limit
 - b. LTC Medicaid Spenddown formula
- IV. Creating the Medicaid asset protection plan for the single applicant
 - a. Modern Half-A-Loaf explained: Gift + Annuity
 - b. Determining the total loaf
 - c. Determining the gift amount
 - d. Calculating the penalty period
 - e. Determining the annuity amount and term
- V. Implementing the Medicaid asset protection plan
- VI. Common post-application issues
 - a. When the penalty period expires