Disability and Medicaid Planning – What Can You Do on Your Own and When Do You Need to See a Specialist

The population is aging and individuals are concerned about whether they or their parents will need to qualify for some type of government benefits and whether these benefits can be acquired without having to spend all the individual's resources. Special Needs Planning is often looked at with an eye towards a disabled child, but planning with the aging parent of a child with a disability is a growing issue. This three-part program is designed to provide useful information to the community at large including local bar associations, pro bono, legal aid, law schools, and attorneys who may not specialize in this practice area.

Presentation 1:30–5:00 p.m. May 8, 2019. CLE credit is available. Attendees are invited to the Welcome Reception at 5:30 p.m. immediately following the program.

There is a $25 fee to attend this program, pre-registration is required.

Register at ambar.org/cop

Hosted by:

AMERICAN BAR ASSOCIATION    SECTION OF REAL PROPERTY, TRUST AND ESTATE LAW
**Program Outline**

**Part I: Introduction to Medicaid Planning**
- The defined terms and important factors
- Types of benefits – need vs. resource
- How a person qualifies and eligibility rules
- Resources/Assets that are exempt or non-exempt

**Time: 1:30 – 2:30 p.m.**
- **Program Co-Chairs:** Beth Anderson, Wyatt Tarrant & Combs LLP, Louisville, KY, Soo Yeon Lee, Mauck & Baker LLC, Chicago, IL, and Elizabeth Lindsay-Ochoa, CBIZ, Boston, MA
- **Moderator:** Gerard Brew, McCarter & English LLP, Newark, NJ
- **Speakers:** Christina T. Vidoli, Winston Law Group, Somerville, MA and Heidi Brown, Osterhout & Mckinney, PA, Fort Meyers, FL

**Part II: Application Process**
- Who can apply
- What authority does one need to provide in order to apply for another person
- Time limits, rejections, appeals
- Application Tips

**Time: 2:45 – 3:45 p.m.**
- **Program Co-Chairs:** Beth Anderson, Wyatt Tarrant & Combs LLP, Louisville, KY, Soo Yeon Lee, Mauck & Baker LLC, Chicago, IL, and Elizabeth Lindsay-Ochoa, CBIZ, Boston, MA
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**Part III: Types of Planning Vehicles and Planning with Specific Assets**
- Residential Property
- First and Third Party Special Needs Trusts
- IRAs
- ABLE Accounts
- Senior Living Community Housing Contracts or Continuing Care Retirement Contracts
- Personal Injury Proceeds

**Time: 4:00 – 5:00 p.m.**
- **Program Co-Chairs:** Beth Anderson, Wyatt Tarrant & Combs LLP, Louisville, KY, Soo Yeon Lee, Mauck & Baker LLC, Chicago, IL, and Elizabeth Lindsay-Ochoa, CBIZ, Boston, MA
- **Moderator:** Gerard Brew, McCarter & English LLP, Newark, NJ
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QUESTIONS? PLEASE CONTACT
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