

Agenda

Important Developments in Health Care, Long Term Care, and Payment Schemes

G Bickford

Deficit Reduction Act regulations
Annuities: Update
Application and submission rules

Medicare Update

T. Berthelot

Changing demographics/political challenges
What's new with Medicare Advantage
Observation status
Improvement standard in the real world

Medicaid: Long-Term Care Planning, Estate Planning And Asset Transfers

G. Bickford

History of Connecticut Medicaid program
Eligibility criteria
Covered services
Spousal impoverishment rules
Transfer of asset rules
Penalties and disqualification periods, transferee liability, exceptions

Financial Planning for the Elderly and Disabled

G. Bickford

Asset protection: estate planning considerations
Exempt or excluded assets
Using trusts and advanced planning techniques
New legislative changes and potential problems

New and Expanded Restrictions on Medicaid Planning

G. Bickford

Viability of asset transfers
Use of trusts
Use of annuities
Viability of Medicaid planning

Looking Ahead: What's Visible on the Horizon?

G. Bickford

Recovery?
Third party liability
Home care issues
Retroactive eligibility for home care

27th Connecticut Medicaid and Medicare Planning Update 2018
Cromwell, CT - Friday, February 23, 2018

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Learning Objectives

You'll be able to:

Learn about Medicaid eligibility, covered services, and asset transfer rules.

Discuss Medicare issues including observation status and the improvement standard.

Understand Medicaid application and submission rules.

Examine long term care planning for protection of assets.

Analyze new and expanded restrictions on Medicaid planning.



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Examine what's new with Medicare Advantage

Analyze restrictions on Medicaid planning

Review Medicaid spousal impoverishment rules, covered services, asset transfer rules, and more

Discuss Medicare issues including observation status and the improvement standard

Understand Medicaid application and submission rules

Continuing Education Credits

Attorneys

Connecticut: Non-Credit CLE
6.5 New Hampshire CLE Hours
8.0 New York CLE Hours
6.5 Vermont CLE Hours

Certified Financial Planners

8.0 Continuing Ed. Hours

Accountants

8.0 CPE Hours



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George B. Bickford *Law Offices of George B. Bickford, East Granby, CT*
Mr. Bickford is a graduate of Harvard College and the University of Connecticut School of Law. From 1974 through 1981 he was employed by Neighborhood Legal Services, Inc. During his last three years there he was director of the Senior Citizens Law Project covering North Central Connecticut. From January, 1982 through October, 1992 Mr. Bickford was a partner in the firm of Weed & Bickford (formerly Weed, Kerrigan & Bickford), engaged in the general practice of law. On November 1, 1992 he opened the Law Offices of George B. Bickford as a sole practitioner in East Granby, Connecticut and, as of July 1, 2009, the firm is known as the Law Offices of George B. Bickford, LLC. The office consists of two attorneys and a highly-trained paralegal staff concentrating in elder law issues. For many years Mr. Bickford has been a guest speaker before bar, medical, social service and public groups on the topics of Social Security, Medicaid and estate planning for the elderly with long-term medical needs, the area in which he currently limits his practice. Mr. Bickford was a member of the Board of Directors of the Alzheimers Association Connecticut Chapter for many years, and he continues to provide them counsel and assistance. He is also a member of the National Academy of Elder Law Attorneys and the Executive Committee of the Elder Law Section of the Connecticut Bar Association, and he co-chairs the Elder Law Committee of the Hartford County Bar Association.

Terry Berthelot, MSW, JD *UConn, Mansfield, CT*
Ms. Berthelot is a lecturer in the Human Development and Family Studies Department at the University of Connecticut. She received her masters degree in Social Work (MSW) from Syracuse University in 1993, after which she designed, implemented, and then coordinated a joint commission-accredited hospice program in the state of Mississippi. Finding herself fascinated by the legal and ethical questions surrounding death and dying, Ms. Berthelot pursued her law degree at the University of Mississippi. At Ole Mississippi, she interned at the Mississippi Office

Seminar Information

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Attendance will be monitored, and attendance certificates will be available after the seminar for most individuals who complete the entire event. Attendance certificates not available at the seminar will be mailed to participants within fifteen business days.

of Capital Post-Conviction Defense Counsel, and won the Christopher P. Charlton Memorial Scholarship; the Law Association for Women Award; and the Outstanding Student Award for Political and Civil Rights. Ms. Berthelot joined the Center for Medicare Advocacy in 2001 after graduating from law school, *cum laude*. As a senior attorney, Ms. Berthelot oversaw CMA's advocacy efforts. She also provided legal advice and representation to Medicare beneficiaries unfairly denied Medicare coverage or access to healthcare, wrote articles for national publications, produced educational materials, engaged in educational outreach activities with a particular focus on the Medicare hospice benefit, was a contributing author to the Medicare Handbook, and served as co-counsel for federal class action lawsuits challenging improper Medicare policies. Also while with CMA, Ms. Berthelot was the lead Medicare trainer for CHOICES, Connecticut's State Health Insurance Assistance Program and for Connecticut's Medicare Senior Patrol. Ms. Berthelot is licensed to practice in Connecticut and New York. She is a member of several professional organizations, including the Connecticut Bar Association, the New York Bar Association, the National Association of Social Workers, and the National Academy of Elder Law Attorneys (NAELA). She is a former chair of NAELA's Health Care Section's steering committee and former Connecticut liaison for National Healthcare Decisions Day.

Here's what past attendees had to say about the program and presenters George Bickford and Terry Berthelot:

"Interesting and informative." — *Paralegal*
"Always learn something new every year!" — *Financial Counselor*
"Great meeting." — *Certified Financial Planner*
"Excellent presentation." -- *Attorney*

Continuing Education Credit Information

This course is open to the public. This intermediate level, group live course offers 8.0 CPE hours in the field of administrative practice. A basic understanding of Medicaid and Medicare is recommended, and no advance preparation is recommended.

HalfMoon Education Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org. Complaints can also be directed to Doug Chapman at doug@halfmoonseminars.org. Sponsor No. 103015.

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Registration

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