

Agenda

Medicare: Addressing Clients' Basic Questions Medicare basics Long-term care problem Part B enrollment Medicare Advantage	<i>A. Owens</i>
Financial Planning for the Elderly and Disabled Asset protection: estate planning considerations Exempt or excluded assets Using trusts and advanced planning techniques New legislative changes and potential problems	<i>R. Daddino</i>
North Carolina Medicaid: The Alternative to Private Pay Options Qualification and benefits The application process Attribution process for married applicants	<i>R. Daddino</i>
North Carolina Medicaid Planning Asset transfers Irrevocable trusts Income planning	<i>J. Fleming</i>
Planning Tools for Incapacity Durable powers of attorney Healthcare directives Guardianships	<i>M. Horne</i>
Handling Ethical Issues in Representation of the Elderly Identifying the client Preventing conflicts of interest Determining client capacity Maintaining client confidentiality	<i>A. Owens</i>



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North Carolina Medicare and Medicaid Planning Update

Live, Interactive Webinar - Thursday, October 31, 2024

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Learning Objectives

- You'll be able to:**
- Learn** about Medicare Parts A, B, C and D in North Carolina, so that you can answer your clients' basic Medicare questions.
 - Explore** financial planning techniques for protecting clients assets and income.
 - Get** an overview of North Carolina's nursing home Medicaid program.
 - Consider** asset transfers, trusts and income planning for North Carolina Medicaid eligibility.
 - Use** durable powers of attorney and healthcare directives to help clients plan for incapacity.
 - Handle** difficult ethical issues that arise when advising elderly and incapacitated clients.



HalfMoon Education Inc.,
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North Carolina Medicare and Medicaid Planning Update

Live, Interactive Webinar - Thursday, October 31, 2024



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| Answer your clients basic Medicare questions | Assist elderly and disabled clients with financial planning |
| Understand North Carolina's nursing home Medicaid program | Plan for incapacity with powers of attorney and health care directives |
| Identify strategies to plan for Medicaid eligibility | |

Continuing Education Credits

Attorneys Pending	Accountants 7.2 CPE Hours
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Webinar Information

Thursday, October 31, 2024 | 9:00 am - 4:00 pm EDT

Log into Webinar: 8:30 - 9:00 am EDT

First Session: 9:00 - 11:00 am EDT

Break: 11:00 - 11:30 am EDT

Second Session: 11:30 am - 1:30 pm EDT

Break: 1:30 - 2:00 pm EDT

Third Session: 2:00 - 4:00 pm EDT

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Faculty

Amanda Owens is an attorney with White & Allen. She is a Board Certified Specialist with the North Carolina State Bar in the area of Elder Law. She also assists clients with special needs planning. Ms. Owens centers her practice on advocacy for older persons, persons with special needs, their representatives, and families. She offers advice for personal and health care planning for long-term care needs; asset protection and navigating the laws governing Medicare and Medicaid; litigation and administrative advocacy for those seeking public benefit and those who are victims of elder abuse (financial or consumer fraud); special needs counseling, including special needs trusts; and other related issues. Her practice area also encompasses incompetency and guardianship matters which often include children with disabilities transitioning to adulthood and continued advocacy of their specific needs. Ms. Owens is accredited for the preparation, presentation and prosecution of claims for veteran's benefits before the Department of Veterans Affairs and as a Veteran Marine spouse is proud to serve military families to receive benefits earned. She earned her B.A. degree, magna cum laude, from The Ohio State University and her J.D. degree from the University of Toledo College of Law.

Rebecca Daddino is an attorney with the Monk Law Firm, PLLC, with offices in Fort Mill, South Carolina, and Charlotte, North Carolina, where she focuses her practice on elder law, estate planning, and guardianships. She developed her passion for assisting the elderly due to her upbringing surrounded by aging family members, including being raised with the help of not only a great-grandmother, but also her maternal grandparents. Ms. Daddino attended Wake Forest University School of Law and is licensed in both North Carolina and South Carolina. She is a member of the National Academy of Elder Law Attorneys (NAELA) and presently serves on the board of the North Carolina Chapter. She is also a member of the North Carolina Bar Association Estate Planning and Fiduciary Law Section and serves as a council member for the North Carolina Bar Association Elder Law Section. In South Carolina, she is a member of the South Carolina Chapter of NAELA and serves on the South Carolina Bar Elder Law Committee.

James Fleming is an attorney with Strauss Attorneys, PLLC. His main areas of practice include estate planning, Medicaid, elder law, probate and trust administration, and business and corporate law. While in college, he worked as a weekend event planner at a local nursing home where he was motivated to become an attorney after witnessing nursing home residents struggle to navigate through their Medicaid and Medicare issues. Mr. Fleming earned his B.A. degree from Georgia College and his J.D. degree from Wake Forest University School of Law.

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Mallory Horne is the founder of the Law Office of Mallory Horne, where she specializes in guardianship, estate and trust litigation. She volunteers with the Corporation of Guardianship, providing pro bono legal services through the Corporation of Guardianship to vulnerable older adults. Ms. Horne is an experienced and seasoned litigator and a fierce advocate for elder abuse and exploitation victims. In June 2023, the Guilford County Family Justice Center recognized her as its 2023 Elder Justice Champion. Ms. Horne earned her J.D. degree from Elon University.

Credit Information

This webinar is open to the public and is designed to qualify for 6.5 CLE hours, including 1.0 ethics hour, for North Carolina attorneys.

This webinar offers accountants 7.2 CPE credit hours (based on 50-minute hours) of intermediate-level group internet based CPE credits in the area of Specialized Knowledge. Knowledge of Medicare and Medicaid is beneficial, and no advance preparation is recommended. NASBA Sponsor No. 103015.

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This webinar has been submitted to the North Carolina State Bar Board of Continuing Legal Education for CLE accreditation which is currently pending. Please visit this course listing at www.halfmoonseminars.org for updates on pending credits.

Attendance will be monitored, and attendance certificates will be available after the webinar for those who attend the entire course and score a minimum 80% on the quiz that follows the course (multiple attempts allowed).

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