

Agenda

Important Developments in Health Care, Long Term Care, and Payment Schemes Deficit Reduction Act regulations Annuities: update Application and submission rules	<i>G. Bickford</i>
Medicaid: Long-Term Care Planning, Estate Planning and Asset Transfers History of Connecticut Medicaid program Eligibility criteria Covered services Spousal impoverishment rules Transfer of asset rules Penalties and disqualification periods, transferee liability, exceptions	<i>G. Bickford</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>G. Bickford</i>
New and Expanded Restrictions on Medicaid Planning Viability of asset transfers Use of trusts Use of annuities Viability of Medicaid planning	<i>G. Bickford</i>
Looking Ahead: What's Visible on the Horizon? Home care issues Retroactive eligibility for home care Establishing a date of institutionalization for spousal home care cases	<i>G. Bickford</i>
The Medicare Program Part A Part B Part C Medicare updates	<i>T. Berthelot</i>



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33rd Connecticut Medicaid and Medicare Planning Update 2024

Live, Interactive Webinar - Thursday, September 12, 2024

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Learning Objectives

- You'll be able to:**
- Explore** important developments in long term care planning.
 - Discuss** developments on the use of annuities to finance long term care.
 - Comply** with the spousal impoverishment rules and transfer of asset rules for the Connecticut Medicaid program.
 - Get tips on** using trusts and advanced financial planning techniques.
 - Identify** new and expanded restrictions on Connecticut Medicaid planning.
 - Discuss** Parts A, B, and C of the Medicare Program and Medicare updates.



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| Examine important developments in health care, long term care and payment schemes | Discuss home care issues and establishing a date of institutionalization for spousal home care cases |
| Study Medicaid in long-term care planning, estate planning and asset transfers | Explore Parts A, B and C of the Medicare Program and get Medicare updates |
| Learn about financial planning for the elderly and disabled | |

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Webinar Information

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Faculty

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 has been 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.

Terry Berthelot, MSW, JD
University of Connecticut, Storrs-Mansfield, CT
Ms. Berthelot is an assistant professor in residence and associate director of Undergraduate Studies for Human Development and Family Sciences (HDFS) at the University of Connecticut. She is also the Editor and Chief for *NAELA* (National Academy of Elder Law Attorneys) *News*. Her research and advocacy is primarily about access to healthcare for people who are over 65 and for people with disabilities. She earned her master's degree in Social Work from Syracuse University, after which she designed, implemented, and then coordinated a joint commission-accredited hospice program in the Mississippi delta. Finding herself fascinated by the legal and ethical questions surrounding death and dying, Ms. Berthelot pursued her law degree at the University of Mississippi. After graduating, *cum laude*, Ms. Berthelot joined the Center for Medicare Advocacy, a national not-for-profit law firm. As a senior attorney, Ms. Berthelot oversaw the Center'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 the Center, Ms. Berthelot was the lead Medicare trainer for Connecticut's State Health Insurance Assistance Program and for Connecticut's Medicare Senior Patrol. Ms. Berthelot is a former chair of the steering committee for the National Academy of Elder Law Attorneys' Health Care Section and she is the former Connecticut liaison for National Healthcare Decisions Day. She is currently a member of the Mansfield Town Council.

Credit Information

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