

Webinar Information

Online - Wednesday, November 13, 2024
9:00 am - 4:00 pm CST

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

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

Break: 11:00 - 11:30 am CST

Second Session: 11:30 am - 1:00 pm CST

Break: 1:00 - 1:30 pm CST

Third Session: 1:30 - 4:00 pm CST

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Minnesota Medicare and Medical Assistance: Eligibility, Benefits and Planning

Live, Interactive Webinar - Wednesday, November 13, 2024

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HalfMoon Education Inc.
PO Box 278
Altoona, WI 54720-0278



Learning Objectives

You'll be able to:

Distinguish between Medical Assistance and Medicare eligibility and benefits.

Explore private pay sources for long-term care.

Use a variety of tools to help your clients plan for incapacity, including healthcare directives and powers of attorney.

Get in-depth information on Minnesota Medical Assistance eligibility, programs and the application process.

Help your clients identify and achieve their financial goals.

Handle common ethical issues that arise in representing the elderly.



HalfMoon Education Inc.,
Your LIVE Education Leader Presents

Minnesota Medicare and Medical Assistance: Eligibility, Benefits and Planning

Live, Interactive Webinar
Wednesday, November 13, 2024



Explore Medicare Parts A, B, C and D

Examine long-term care payment options, including insurance, private funds and Medical Assistance

Evaluate tools for planning for incapacity

Understand Minnesota Medical Assistance eligibility and programs

Help clients achieve their financial goals

Understand Medicaid estate recovery

Continuing Education Credits

Attorneys
Pending

Accountants
7.2 CPE Credits



Agenda

Medicare, Medicaid and Placement Considerations	<i>D. Rephan</i>
What is Medicare and who qualifies for it?	<i>A. Frasier</i>
Medicare part A, B, D	<i>T. Baker</i>
Medicare supplemental insurance (Medigap)	
What is Medicaid and who qualifies for it?	
Current long-term care concerns and considerations	
Minnesota assisted living facility statute (Minnesota statues chapter 144 G)	
Alternative Payment Options for Long-Term Care	<i>D. Rephan</i>
Private pay sources for long term care	<i>A. Frasier</i>
• Long term care (LTC) insurance (issues surrounding LTC Insurance)	<i>T. Baker</i>
• Private funds	
• Medicaid-compliant annuity	
Minnesota Veterans Home	
VA non-service connected pension	
Planning Tools for Incapacity	<i>D. Rephan</i>
Power of attorney (gifting limitations in statutory short form)	<i>A. Frasier</i>
Healthcare directive	<i>T. Baker</i>
Provider orders for life sustaining treatment (POLST)	
Guardianships and conservatorships	
Minnesota Medical Assistance Eligibility, Programs, and Application	<i>D. Rephan</i>
Role of the Medical Assistance program	<i>A. Frasier</i>
Medical Assistance eligibility categories (asset, income, and medically eligible) (review hypotheticals)	<i>T. Baker</i>
Available versus excluded assets	
Program Examples: MA-LTC, MA-EW, CADI, CDCS, MA-EPD	
Spousal impoverishment rules and income allowances (review hypotheticals)	
Uncompensated transfers and transfers between spouses (qualified account considerations)	
Medical Assistance application timeline, common verifications, and common concerns	
Financial Planning for the Elderly and Disabled	<i>D. Rephan</i>
Financial goals and familial considerations	<i>A. Frasier</i>
Asset protection planning strategies (five-year lookback, penalty period planning, purchases and payments, Medicaid-compliant community spouse annuity	<i>T. Baker</i>
Special, pooled special, and supplemental needs trusts	
ABLE accounts	
Medicaid Estate Recovery	<i>D. Rephan</i>
What is estate recovery?	<i>A. Frasier</i>
When is estate recovery appropriate?	<i>T. Baker</i>
Common concern: options for protecting the homestead	
Handling Ethical Issues in Representation of the Elderly	<i>D. Estle</i>
Identifying the client	
Preventing conflicts of interest	
Determining client capacity	
Maintaining client confidentiality	

Faculty

David Rephan *Chestnut Cambronne*
Mr. Rephan is a partner at Chestnut Cambronne. In his 30 years of practicing law, he has focused his practice primarily in the areas of elder law, disability law (including special needs trust law), government benefits law, and veterans law. He has successfully litigated class actions and individual actions on behalf of government benefits recipients. Mr. Rephan has also participated in successful legislative initiatives to increase the rights of persons appealing to the Minnesota Department of Human Services, as well as other rights of government benefits recipients.

Allison Frasier *Chestnut Cambronne*
Ms. Frasier is an attorney at Chestnut Cambronne and practices and counsels clients about elder law issues, such as long-term care and asset preservation planning, Medical Assistance and veterans benefits, as well as guardianship and conservatorship, special needs and disability planning, estate planning, and probate and trust administration. She received her B.A. degree from Carleton College and her J.D. degree from the University of St. Thomas School of Law. Ms. Frasier is licensed to practice law in Minnesota State Court and is an accredited attorney for veterans benefits before the Department of Veterans Affairs.

Téa Baker *Chestnut Cambronne*
Ms. Baker is an associate attorney at Chestnut Cambronne PA. Her practice focuses on elder law (including Medicaid and asset protection planning), disability law (including special needs trust law), and estate planning. She is licensed in Minnesota. Ms. Baker earned her B.A. degree from the University of Minnesota, Twin Cities and her J.D. degree from the University of St. Thomas School of Law.

David T. Estle *Henningson & Snoxell LTD*
Mr. Estle is an elder law attorney at Henningson & Snoxell, Ltd., located in Maple Grove, Minnesota, practicing in the areas of elder law, Medical Assistance planning, probate and trust administration, and general estate planning. He routinely represents clients with elder law issues, focusing on the costs and considerations of long-term care and elder health. Mr. Estle practices with an exclusive estate planning and administration and elder law focus. He received his B.A. degree from St. Olaf College in Northfield, Minnesota and his J.D. degree from the University of Arizona James E. Rogers College of Law in Tucson, Arizona. Mr. Estle is admitted to practice in Minnesota and is a member of the Minnesota State Bar Association. He is a board member on the Minnesota Chapter of the National Academy of Elder Law Attorneys (NAELA).

Credit Information

This webinar is open to the public and is designed to qualify for 6.0 CLE hours for Minnesota attorneys and 7.2 CPE credits for Minnesota accountants.

This webinar has been submitted to the Minnesota Board of Continuing Legal Education for CLE accreditation, which is currently pending.

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