Learning Objectives

You’ll be able to:

Discuss Medicare basics, coverage and Medicare Advantage.

Understand Medicaid application and submission rules.

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

Examine long term care planning for protection of assets.

Analyze new and expanded restrictions on Medicaid planning.

Review home care issues, including retroactive eligibility for home care.

Agenda

Medicare: The Good, the Bad, and the Ugly
T. Berthelot

Medicare basics
Medicare coverage
Medicare Advantage
Hot topics

Important Developments in Health Care,
Long Term Care, and Payment Schemes
G. Bickford
Deficit Reduction Act regulations
Annuities: Update
Application and submission rules

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,
transfer 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

28th Connecticut Medicaid and Medicare Planning Update 2019
Cromwell, CT - Friday, February 22, 2019

Discuss Medicare basics, coverage issues and, hot topics
in Medicare

Learn about Medicare Advantage

Understand Medicaid application and submission rules

Analysis on Medicaid planning

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

Continuing Education Credits

Accountants
8.0 CPE Hours

Attorneys
6.5 Connecticut CLE Hours
6.66 Maine CLE Hours
6.5 New Hampshire CLE Hours
8.0 New Jersey CLE Hours
8.0 New York CLE Hours
8.0 Rhode Island CLE Hours
6.5 Vermont CLE Hours

Certified Financial Planners
8.0 Continuing Ed. Hours

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Faculty

George B. Bickford  Law Offices of George B. Bickford, East Granby, CT
Mr. Bickford's practice in 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 Alzheimer's 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, J.D.  University of Connecticut, Storrs-Mansfield, CT
Ms. Berthelot is a Lecturer in Human Development and Family Studies. 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, cum laude. After graduating, 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 Task Force and she is the former Connecticut liaison for National Healthcare Decisions Day. She is currently a member of the Mansfield Town Council.

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

Seminar Information

Red Lion Hotel Cromwell
100 Berlin Road
Cromwell, CT 06416
(860) 635-2000

Tuition
$299 for individual registration.
$279 for Three or more registrants from the same company at the same time.

Included with your registration:
Complimentary continental breakfast and printed seminar manual.

Receive a reduced tuition rate of $101 by registering to be our on-site coordinator for the day. For availability and job description, please visit www.halfmoonseminars.org.

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• Visit us online at www.halfmoonseminars.org
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Cancellation:
Cancellations must be made at least 48 hours prior to the seminar. A $59 service charge will be assessed for each registrant cancellation. Cancellations within 48 hours will receive a credit toward another seminar or the self-study package. You may also send another person to take your place.

Continuing Education Credit Information
This course is open to the public and offers accountants 9.0 intermediate-level CPE hours in the areas of taxes. 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. 1003015. Accountants attended this course should have a basic knowledge of health care planning, and no advance preparation is recommended.

This course is designed to qualify for 6.5 CLE hours for Connecticut and New Hampshire attorneys. Educators and courses are not subject to approval in Pennsylvania and New Hampshire. This course is approved for 6.6 hours for Maine attorneys and 8.0 Rhode Island CLE hours for attorneys. HalfMoon Education is certified by the New York State Board of Accountancy as an Accredited Provider of CLE programs. This traditional format course offers 8.0 Areas of Professional Practice CLE hours, which are appropriate for new and experienced attorneys.

Registration
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How to Register
Online:
www.halfmoonseminars.org

Phone:
715-835-5900

Fax:
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Mail:
HalfMoon Education Inc.,
PO Box 276, Altona, WI 54720-0279

Complete the entire form. Attach duplicates if necessary.

Tuition
I am attending the live seminar.
$299.00

I am attending, please send me the self study package for $199.00

$279.00 each.

Checks: Make payable to HalfMoon Education Inc.

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