Agenda

Medicare Update T. Berthelot
- Medicare basics
- Long-term care problem
- Part B enrollment
- Medicare Advantage

Important Developments in Health Care, Long Term Care, and Payment Schemes G. Bickford
- Deficit Reduction Act regulations
- Annuites: 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, 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

Learning Objectives

You’ll be able to:

Discuss Medicare basics, coverage issues and, problems with long-term care.

Discuss Medicaid eligibility criteria and covered services.

Review Medicaid spousal impoverishment rules, asset transfer rules, and more.

Understand Medicaid application and submission rules.

Explore asset protection planning strategies.

Consider the use of trusts and annuities in Medicaid planning.

29th Connecticut Medicaid and Medicare Planning Update 2020
North Haven, CT - Friday, February 28, 2020

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 restrictions on Medicaid planning

Discuss home care issues

Explore the use of trusts and annuities

Continuing Education Credits

Attorneys
- 6.5 Connecticut CLE Hours
- 6.5 New Hampshire CLE Hours
- 8.0 New Jersey CLE Hours
- 8.0 New York CLE Hours
- 6.5 Vermont CLE Hours

Accountants
- 8.0 CPE Hours

Certified Financial Planners
- 8.0 Continuing Ed. 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, Krippin & 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 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, MSW, JD
University of Connecticut, Storrs-Mansfield, CT
Ms. Berthelot is an assistant professor in residence of Human Development and Family Studies at the University of Connecticut. She is also the director of the Aging Research Interest Group. Her research and advocacy is primarily about access to healthcare for people who are over 65 and for people with disabilities. She earned her Masters 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 Elder Law Attorneys Health Care Section and she is the current 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

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