

## SEMINAR

# Medicaid & Healthcare Planning Update 2022

*Navigate the always-changing, complex world of Medicaid planning and nursing home residents' rights issues*

So, perhaps you are interested in helping your clients obtain Medicaid benefits to pay for their long-term care costs. Or, perhaps you have a client in an assisted living facility or nursing home that is being threatened with eviction, or is being pressured to sign an unfair admission contract. How do you properly advise your elderly clients and their family members in dealing with these complex issues, when the law changes so fast that you haven't yet had time to memorize even the existing Medicaid regulations?

The Federal Medicaid statute and state regulations may seem clear, but elder law practice is truly a trap for the unwary practitioner, with changes to acceptable planning strategies being made randomly and without a formal rule-making process. Challenges to Medicaid planning are not only limited to irrevocable trust denials, but have been expanded by the agency to include challenges to the use of spousal annuities, transfers to disabled children, and estate recovery litigation.

This session teaches you skills and techniques you need to help your clients properly prepare and plan for long-term care, as well as explore some last-minute techniques to obtain Medicaid eligibility. The experts explore recent case law, relevant regulatory updates, and recent MassHealth challenges from irrevocable trusts to annuity rules. Learn how to defend against such challenges in the application and appeal process. Familiarize yourself with the rights bestowed upon residents in nursing homes and assisted living facilities, so that you can help your clients safeguard themselves against unlawful facility admission contracts.

## Agenda

- Overview of Basic Medicaid Eligibility Rules and Application Process
- Complete Overview of Permissible Transfer Rules, Last-Minute Techniques to Obtain MassHealth Benefits, and the Latest Challenges to Such Techniques
- Review of the Annuity Rules for Married Couples and Single Individuals, and Discussion of MassHealth's Recent Challenges to Spousal Annuity Beneficiary Designations
- Estate Recovery and Life Estate Valuation
- Review of Recent Case Law Concerning Important Developments in the Medicaid Planning World That Every Practitioner Should Be Aware of
- Overview and Discussion of Key Regulations and Issues to Be Aware of in Terms of Ensuring That the Rights of Your Client as a Resident of a Skilled Nursing Facility or Nursing Home Are Being Protected
- "Ask the Experts" Q&A Session

## Faculty

Lisa M. Neeley, Esq., *Mirick, O'Connell, DeMallie & Lougee LLP, Worcester, Chair*

Steven M. Cohen, Esq., *Rubin and Rudman LLP, Boston*

Patricia Keane Martin, Esq., *Seegel Lipshutz Lo & Martin LLP, Wellesley Hills*



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## Dates & Location

Register at [www.mcle.org](http://www.mcle.org)

### LIVE WEBCAST

Thursday, June 16, 2022

2:00 pm–5:00 pm

Program Number: 2220215WBC

### REBROADCAST

Friday, July 1, 2022

9:00 am–12:00 noon

Program Number: 2220215RBC

### REBROADCAST

Monday, July 11, 2022

2:00 pm–5:00 pm

Program Number: 2220215RB1

### ON DEMAND WEBCAST

View after Monday, July 11, 2022

Program Number: 2220215WBA

## Tuition *(includes written materials)*

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## Materials

The materials for this program are available *online only* and can be downloaded via the link emailed to you upon registration.

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## CLE Credits

Earn up to 3 CLE credits

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For course agendas, hours, fees, and discounts, please refer to the respective seminar pages. The fee includes program instruction and all electronic written materials unless otherwise noted.

To gain early access to online materials, please register in advance of the program.


Upon registration, MCLE will e-mail a confirmation.

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## If your plans change

If you're unable to participate in a program on the date for which you registered, you will receive an email about how to access the program on demand via webcast and/or downloadable mp3 file, including the written materials in electronic form, in full satisfaction of the tuition paid. If you prefer a refund, let us know by the end of the business day prior to the program and we'll refund your tuition after deducting a \$35 processing fee. Note that limited enrollment programs are an exception, cancellation of which require two weeks notice and are subject to a \$55 processing fee.

## New lawyer discounts— always the lowest price

For the first three years of practice, MCLE offers new lawyers a 25% discount on all of its products, including programs, books, audio CDs and mp3 recordings. If you were admitted to the bar after 2018, take advantage of the new lawyer prices listed throughout the catalog.

Pending admittees, law students and paralegals are also eligible for a 25% discount on most MCLE programs.

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- Solo Practitioners ..... \$95
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REFERENCE # 22-022

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- ▶ **WALK UP** on the day of the program or **DROP IN** to  
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