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, 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

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

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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.

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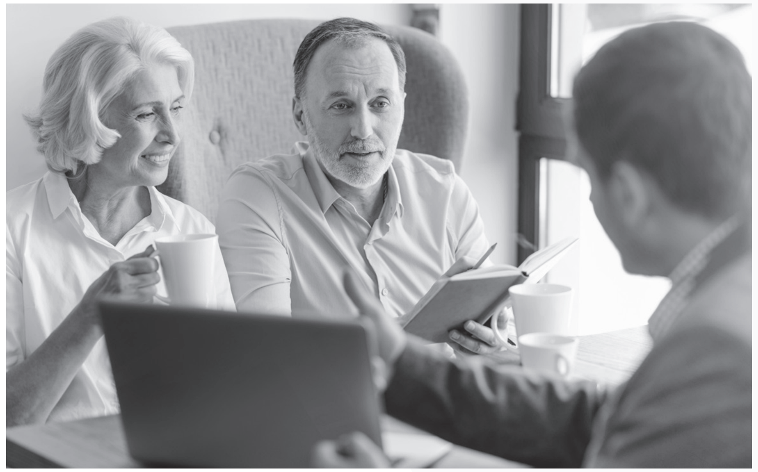

Discuss Medicare basics, coverage issues and, hot topics in Medicare

Learn about Medicare Advantage

Understand Medicaid application and submission rules

Analyze restrictions on Medicaid planning

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

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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 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 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 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 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 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.

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

Registration
8:00 - 8:30 am
Morning Session
8:30 - 11:45 am
Lunch (On your own)
11:45 am - 12:45 pm
Afternoon Session
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Continuing Education Credit Information

This course is open to the public and offers accountants 8.0 intermediate-level CPE hours in the area 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. 103015. 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 preapproval in Connecticut and New Hampshire. This course is approved for 6.66 hours for Maine attorneys and 8.0 Rhode Island CLE hours for attorneys.

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Halfmoon Education Inc. is a New Jersey CLE Service Provider (No. 164), and this course offers 8.0 CLE hours to New Jersey attorneys.

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Attendance will be monitored, and attendance certificates will be available after the seminar for most individuals who complete the entire event. Attendance certificates not available at the seminar will be mailed to participants within fifteen business days.

*HalfMoon Education will provide financial hardship assistance to New York attorneys who wish to attend this event. Contact Doug Chapman at *doug@halfmoonseminars.org* for details.

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Registration

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