

Agenda

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

The Medicare Hospice Benefit

T. Berthelot

Eligibility Access Coverage

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30th Connecticut Medicaid and Medicare Planning Update 2021

Live, Interactive Webinar - Monday, February 22, 2021

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Learning Objectives

You'll be able to:

Identify important developments in Medicaid, health care, long term care and payment schemes.

Explore eligibility criteria for Medicaid for long term care, and discuss spousal impoverishment rules.

Help elderly and disabled clients meet their financial planning goals and protect their assets.

Comply with new and expanded restrictions on Medicaid planning techniques including trusts and annuities.

Explore the Medicare hospice benefit, including eligibility, access and coverage.



HalfMoon Education Online Learning

30th Connecticut Medicaid and Medicare Planning Update 2021

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Examine important developments in health care, long term care and payment schemes

Study Medicaid in long-term care planning, estate planning and asset transfers

Learn about financial planning for the elderly and disabled

Discuss new and expanded restrictions on Medicaid planning

Explore the Medicare hospice benefit

Continuing Education Credits

Accountants

8.0 CPE Hours

NASBA

8.0 CPE Hours
in Specialized Knowledge

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6.5 New Hampshire CLE Hours
8.0 New York CLE Hours
8.0 Rhode Island MCLE Hours
6.5 Vermont CLE Hours



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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 an assistant professor in residence of Human Development and Family Sciences 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 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.

Webinar Information

Log into Webinar 8:00 - 8:30 am EST	Break 11:30 am - 12:30 pm EST
Morning Session 8:30 - 11:30 am EST	Afternoon Session 12:30 - 4:40 pm EST

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