

Agenda

Medicare Basics Part B enrollment Cost-sharing (premium, deductible, etc.) Choices in Medicare: Medigap/Medicare Supplement vs. Medicare Advantage and Part D Programs that help with Medicare costs: Medicare Savings Programs, Extra Help/LIS and EPIC	<i>E. Hausman</i>
New York Medicaid Managed Long Term Care Program Update	<i>S. Lyons</i>
Unintentional Gifting: Avoiding Probate May Disqualify Your Clients From Medicaid Adding children to your bank account Deeding real estate to children Life estate vs. right to occupy	<i>S. Lyons</i>
Medicaid: Long-Term Care Planning, Estate Planning and Asset Transfers History of the New York Medicaid program Eligibility criteria Covered services Spousal impoverishment rules Transfer of asset rules Penalties and disqualification periods, transferee liability, exceptions	<i>S. Meyers</i>
Financial Planning for the Elderly and Disabled Asset protection: estate planning considerations Exempt or excluded assets Using trusts and advanced planning techniques New legislative changes and potential problems	<i>S. Meyers</i>
New and Expanded Restrictions on Medicaid Planning Viability of asset transfers Use of trusts Use of annuities Viability of Medicaid planning	<i>S. Lyons</i>

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New York Medicaid and Medicare Planning Update

Live, Interactive Webinar - Wednesday, May 19, 2021

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Learning Objectives

- You'll be able to:**
- Understand** the complexities of Medicare Part B and Part D.
 - Learn** about programs that help with Medicare costs.
 - Avoid** unintentional gifting, which might disqualify your clients from Medicaid.
 - Review** Medicaid eligibility criteria.
 - Discuss** how Medicaid eligibility is affected by asset transfers and estate planning.
 - Learn** about the pros and cons of asset protection planning techniques, including the use of trusts.
 - Review** new and expanded restrictions on Medicaid planning.



HalfMoon Education Online Learning

New York Medicaid and Medicare Planning Update

Live, Interactive Webinar - Wednesday, May 19, 2021



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| Get an update on Medicare, including Part B enrollment and choices in Medicare | Examine Medicaid eligibility, long-term care planning, estate planning and asset transfers |
| Review updates on the New York Medicaid Managed Long Term Care program | Explore financial planning for the elderly and disabled |
| Study unintentional gifting and how avoiding probate may disqualify clients from Medicaid | Learn about new and expanded restrictions on Medicaid planning |

Continuing Education Credits

Accountants 7.0 CPE Hours	Certified Financial Planners 7.0 CE Hours
Attorneys 7.0 New York CLE Hours	



Faculty

Eric Hausman
Independent Consultant with Medicare Education Consultants in Staten Island, NY
Mr. Hausman an independent consultant specializing in Medicare education and training. He has conducted hundreds of Medicare presentations since 1998 on all aspects of Medicare and related insurance, both to groups of people with Medicare and to professionals. Over the last 15+ years, he has served as the lead trainer for the HIICAP program in New York State, providing training and technical assistance to Medicare counselors throughout the state. Mr. Hausman previously worked in the Medicare operations of Empire Blue Cross Blue Shield. He holds both his BBA and MBA degrees from Baruch College in Manhattan. He loves to talk to people about Medicare.

Samantha Lyons
Senior Associate of the firm Enea, Scanlan & Sirignano, LLP in White Plains, NY
Ms. Lyons concentrates her practice on elder law with a focus on Medicaid home care and nursing home issues. She is a graduate of Pace University School of Law (2012) and is admitted to practice in New York and New Jersey. Ms. Lyons is a member of the New York State Bar Association, the Elder Law and Special Needs Section (Senior Law Day Committee, Medicaid Committee) and a member of the Westchester County Bar Association. Ms. Lyons is also a co-chair of the Cocktails for a Cause Committee of the Pace Women's Justice Center.

Sara Meyers Esq. *Member at Enea, Scanlan & Sirignano LLP in White Plains, NY*
Ms. Meyers is member at the firm of Enea, Scanlan & Sirignano, LLP. She concentrates her practice on elder law, estate and Medicaid planning and special needs planning. Her focus is on long-term care planning strategies, and Medicaid home care and nursing home issues. Prior to joining Enea, Scanlan & Sirignano, Ms. Meyers was the staff attorney at the Sadin Institute on Law of the Brookdale Center on Aging of Hunter College. She concentrated on Medicaid, home care, and the Medicare Part D prescription drug program. She has created materials and conducted training seminars for social service providers, attorneys, social workers and geriatric care managers on topics including elder law, Medicaid, home care, and administrative appeals. Ms. Meyers has a B.A. degree in history from Brandeis University and a J.D. degree from the Cardozo School of Law.

Webinar Information

Log into Webinar 8:00 - 8:30 am EDT	Break 11:25 - 11:55 am EDT
Morning Session 8:30 - 11:25 am EDT	Afternoon Session 11:55 am - 3:30 pm EDT

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