Agenda

Medicare: Addressing Clients' Basic Questions *S. Murdoch*
- Medicare basics
- Long-term care problem
- Part B enrollment
- Medicare advantage
- Medicare Part D

Current Options for Paying for Long-Term Care *M. Laidlaw*
- Private pay sources for long-term care
  - Long term care (LTC) insurance
  - LTC annuity (deferred and hybrid)
- New York Medicaid for long term care
  - Qualification and benefits
  - The application process
  - Special circumstances

The Nuts and Bolts of Guardianships in New York *M. Korsinsky*
- Guardianship under MHL Article 81 explained
- Advanced directive alternatives
- When needed
- Who can file and parties to be noticed
- How to file and related procedures

New York Independent Assessor (NYIA) Program *L. Enea, R. Arbuco*
- Navigating the post financial eligibility process for commencing community Medicaid benefits
- Explanation of the New York Independent Assessor (NYIA)
- New changes to the program and potential hurdles including jurisdictional preferences

Handling Ethical Issues in Representation of the Elderly *D. Ball*
- Identifying the client
- Preventing conflicts of interest
- Determining client capacity
- Maintaining client confidentiality

Financial Planning for the Elderly and Disabled *A. Polizzotto III*
- Asset protection: estate planning considerations
- Exempt or excluded assets
- Using trusts and advanced planning techniques
- New legislative changes and potential problems

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Live, Interactive Webinar - Thursday, June 20, 2024

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Evaluate current private-pay and public-pay options for long term care.

Understand the fundamentals of New York guardianship law and procedure.

Explore the New York Independent Assessor (NYIA) program.

Handle common ethical issues in representation of the elderly, including the determination of client capacity.

Help your clients with asset protection planning opportunities.

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Evaluate current options for paying for long-term care

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Handle ethical issues in representation of the elderly

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Faculty

Sarah Murdoch *Director of Client Services at Medicare Rights Center*
Ms. Murdoch joined the Medicare Rights Center in 2014. As director of client services, Ms. Murdoch oversees programmatic operations of the client services department. This includes the national helpline; Medicare Rights Center's participation in state Ombudsman and technical assistance programs such as New York's Health Insurance Information Counseling and Assistance Program (HIICAP), Community Health Access to Addiction and Mental Healthcare Project (CHAMP), the Independent Consumer Advocacy Network (ICAN), Community Health Advocates (CHA); and Medicare Rights Center's volunteer and intern program.

Moira Laidlaw *Hollis Laidlaw & Simon P.C.*
Clients have turned to Moira Laidlaw for 20 years on a broad range of trust and estate planning needs, including wills, trusts, guardianship, probate, and estate administration. She also works with clients in matters regarding elder law, special needs planning, Medicaid, long-term care asset protection, small business planning, and high net worth estate tax planning. Additionally, she handles fiduciary litigation concerning trusts, wills, guardianships, conservatorships, and related accountings. Ms. Laidlaw is a Certified Elder Law Attorney (CELA), one of approximately 400 attorneys in the U.S. who hold this designation, as accredited by the National Elder Law Foundation and the American Bar Association.

Michael Korsinsky *Korsinsky & Klein*
Mr. Korsinsky, is a founding partner at Korsinsky & Klein, LLP. He manages the firm's litigation groups and health care department, which includes appearing before various courts as well as those matters before administrative tribunals at various government agencies. He concentrates and dedicates most of his time to construction litigation, elder law and health law matters. Mr. Korsinsky also represents nursing homes throughout New York State, advising them in all areas of reimbursement-related issues. He has extensive experience in representing nursing homes in Mental Hygiene Law Article 81 Guardianship proceedings in an effort to obtain Medicaid eligibility for their residents. Mr. Korsinsky also advises and represents healthcare facilities in an effort to solve complex discharge planning problems.

Lauren Enea, Esq. *Enea, Scanlan & Sirignano*
Ms. Enea is a senior associate at Enea, Scanlan & Sirgnano, LLP. She concentrates her practice on wills, trusts and estates, Medicaid planning, special needs planning and probate/estate administration. She believes that it is never too early or too late to start planning for your future and enjoys working with individuals to ensure that their plan best suits their needs. An active member of the local bar associations, Ms. Enea was appointed to the executive committee of the Westchester County Bar Association (WCBA) trusts and estates section. She is also the co-chair of the WCBA New Lawyers Section, treasurer of the Columbian Lawyers Association of Westchester County, chair of the New York State Bar Association (NYSBA) Elder Law and Special Needs Section Publications Committee and co-editor of the *NYSBA Elder Law and Special Needs Section Journal*.

Robert Arbuco, Esq. *Enea, Scanlan & Sirignano*
Mr. Arbuco is an associate at Enea, Scanlan & Sirignano, LLP. He concentrates his practice on Medicaid planning and estate planning. He believes it is crucial to plan for the future of yourself and your loved ones. Mr. Arbuco received a B.S. degree in Global Studies: Political Economy and Development and a B.A. degree in Italian Studies from the University of Arizona, graduating in 2016. He received a J.D. degree from the Elisabeth Haub School of Law at Pace University, graduating *cum laude* in 2021. He is admitted to practice law in New York. Mr. Arbuco is a member of the New York State Bar Association (NYSBA) and the Westchester County Bar Association (WCBA).

Deborah S. Ball *Law Offices of Deborah S. Ball*
The Law Offices of Deborah S. Ball is a practice concentrating on elder law issues, matters affecting the developmentally disabled, trust and estate planning options, including will preparation, and estate administration. As a former assistant district attorney, Ms. Ball investigated home repair schemes against the elderly community. Ms. Ball has been appointed as guardian, guardian ad litem, court evaluator, and attorney for the alleged incapacitated person, and she has represented clients in guardian proceedings involving elderly and disabled individuals.

Alfred Polizzotto, III, Esq., CFP *Polizzotto & Polizzotto, LLC*
Mr. Polizzotto III practicing in estate planning and administration, litigation, family law, elder law, real estate, financial planning, and more.

For more information on the presenters:
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