

Agenda

Medicare: Addressing Clients' Basic Questions Medicare basics Long-term care problem Part B enrollment Medicare Advantage	<i>J. Lynch</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>T. Patterson</i>
Overview of the Nursing Home Medicaid Program in Michigan Preplanning for Medicaid qualification The application process Traps to avoid	<i>J. Yonkers III</i>
Michigan Medicaid Planning Asset transfers Irrevocable trusts Income planning	<i>S. DeWall</i>
Planning Tools for Incapacity Durable powers of attorney Healthcare directives Guardianships	<i>J. Lynch</i>
Handling Ethical Issues in Representation of the Elderly Identifying the client Preventing conflicts of interest Determining client capacity Maintaining client confidentiality	<i>T. Quinn</i>

Michigan Medicare and Medicaid Planning Update

Live, Interactive Webinar - Tuesday, October 29, 2024

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HalfMoon Education Inc.
PO Box 278
Altoona, WI 54720-0278



Learning Objectives

- You'll be able to:**
- Learn** about Medicare Parts A, B, C and D in Michigan, so that you can answer your clients' basic Medicare questions.
 - Explore** financial planning techniques for protecting clients assets and income.
 - Get** an overview of Michigan's nursing home Medicaid program.
 - Consider** asset transfers, trusts and income planning for Michigan Medicaid eligibility.
 - Use** durable powers of attorney and healthcare directives to help clients plan for incapacity.
 - Handle** difficult ethical issues that arise when advising elderly and incapacitated clients.



HalfMoon Education Inc.,
Your LIVE Education Leader Presents

Michigan Medicare and Medicaid Planning Update

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- Answer** your clients basic Medicare questions
- Understand** Michigan's nursing home Medicaid program
- Identify** strategies to plan for Medicaid eligibility
- Assist** elderly and disabled clients in with financial planning
- Plan** for incapacity with powers of attorney and health care directives

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Tuesday, October 29, 2024 | 9:00 am - 4:00 pm EDT

Log into Webinar: 8:30 - 9:00 am EDT

First Session: 9:00 - 11:00 am EDT

Break: 11:00 - 11:30 am EDT

Second Session: 11:30 am - 1:30 pm EDT

Break: 1:30 - 2:00 pm EDT

Third Session: 2:00 - 4:00 pm EDT

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Faculty

Jacob Lynch is a partner with Ryan & Lynch and focuses in the areas of estate planning, probate, business and corporate planning, elder law, asset protection, residential and commercial real estate, and related litigation. He represents many of the law firm's transactional clients, helping individuals create estate plans, start businesses, and buy and sell real estate. Mr. Lynch enjoys working with clients across the wealth spectrum, helping them avoid a costly probate process and simplify the management of assets during their lifetimes. He has helped clients with hundreds of acres in land holdings, family camps, large investment and retirement accounts, vast firearms collections, family conflicts, special needs children, diverse business interests, and more. Mr. Lynch earned his B.S. degree from Northern Michigan University (with honors), and his J.D. degree from Michigan State University College of Law (with honors).

Tina M. Patterson, Esq. is a distinguished attorney who is the principal attorney of the esteemed law firm Patterson Justice Counsel, PLLC. She is also the president and director of research at The PuLSE Institute, a nationally renowned independent, nonpartisan anti-poverty think tank. Both organizations are headquartered in the historic city of Detroit, Michigan. Driven by conviction that the law is an important instrument of justice that can make a positive difference, Ms. Patterson began her legal career as a United States Federal Government Attorney, working for the Social Security Administration (SSA). Serving in one of the Federal Government's key agencies that administers benefits for millions of Americans, Ms. Patterson trained at SSA Hearing and Appeals Division Headquarters in Falls Church, Virginia, just outside the nation's capital. In her role at the Social Security Administration, Ms. Patterson was designated as an attorney advisor to Administrative Law Judges across the United States and United States Territories, including Puerto Rico. She advised judges and wrote judicial opinions concerning Title II and Title XVI Social Security Benefits, which ensured judicial integrity and the legitimacy of the adjudicative process in the application of the law in granting relief to Social Security beneficiaries. As a veteran legal practitioner, Ms. Patterson leads clients on the transformational journey of becoming the legacy pioneers of their generation through properly and appropriately planning, preparing, protecting, preserving, and passing their valuable assets, financial wealth, and wisdom for the benefit of succeeding generations.

John Yonkers III is a partner with Brogan & Yonkers, P.C. His main areas of practice are elder law and estate planning. Prior to becoming a lawyer, he worked as a legal clerk and has focused his education and practice in the areas of estate planning and elder law. Mr. Yonkers is a NAELA member. He is passionate about the outdoors and volunteers with the Friends of Harlow Lake trail builders group, the Upper Peninsula Land Conservancy, and the 906 Adventure Team, a youth cycling group where he has served as a coach and on the Board of Directors. Mr. Yonkers earned his undergraduate degree in Public Administration from Ferris State University and completed his J.D. degree at Thomas M. Cooley Law School.

Shannon DeWall is an attorney with the Law Office of Shannon DeWall. PLLC. She is an experienced elder law and estate planning attorney who focuses her practice on Medicaid planning and asset protection. Her practice is dedicated to providing comprehensive elder care services that prioritize her clients' quality of life, asset preservation, and peace of mind. Ms. DeWall's commitment to empowering families during vulnerable times has made her a trusted advisor in the field. She is a member of the Elder Law and Disability Rights Section of the State Bar of Michigan, the National Academy of Elder Law Attorneys, and the Life Care Planning Law Firms Association.

She frequently speaks at conferences, sharing her expertise to help clients and fellow attorneys understand the intricacies of long-term care planning. Ms. DeWall earned her J.D. degree from Western Michigan University Cooley Law School.

Terrence G. Quinn is a distinguished attorney with over 20 years of expertise in estate planning, probate and elder law. His remarkable career is marked by numerous accolades, including multiple recognitions as a Top 10 Attorney in Michigan for Estate Planning and being named one of the Top 100 Attorneys in Michigan by the National Black Lawyers for consecutive years. Beyond his legal accomplishments, Mr. Quinn's leadership journey began during his college years when he played football for the University of Michigan. As an active member of the 1997 National Championship football team during his senior year, he demonstrated the same dedication and teamwork that he now brings to his legal practice. He currently serves as the chair of the real property trusts and estates section of the National Bar Association and has been a consistent contributor to Michigan's Institute for Continuing Legal Education (ICLE), where he also served on the executive committee for years. His role as a sought-after speaker by bar associations, continuing legal education organizations and churches nationwide underscores his passion for sharing his extensive knowledge and expertise. In addition to his professional achievements, Mr. Quinn is deeply committed to his community, serving as an ordained pastor. His personal life is equally inspiring, having been married to his beloved wife, Adrienne, for over two decades. Together, they have two wonderful children, Titus and Jaida. Mr. Quinn's life and career are a testament to high achievement, leadership, and a deep commitment to making a positive impact. His journey from a national championship football player to a top-tier attorney and community leader exemplifies the heights one can reach with dedication, passion, and a drive to serve others.

For more information on the presenters:
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