Agenda

Medicare: Addressing Clients' Basic Questions — *A. Houle*
- Medicare basics
- Long-term care problem
- Part B enrollment
- Medicare Advantage
- How taxes affect Part B premiums

Planning Tools for Incapacity — *S. Terry*
- Durable powers of attorney
- Healthcare directives
- Guardianships
- Revocable living trusts

Medicaid: The Alternative to Private Pay Options — *B. Isaacson*
- Washington State Medicaid eligibility
- Covered services
- Services that are not covered
- Spousal impoverishment rules
- Penalties and restrictions
- The application process
- Appealing Medicaid decisions

Financial Planning for the Elderly and Disabled — *A. Paker*
- Financial goals
- Asset protection planning
- Role of Medicaid
- Trusts and advanced planning techniques
- Anticipated developments in financial planning

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

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Faculty

Alexandra Houle works together with her business partner Elena Houle at My Medicare Solutions, a family company in Auburn, Washington. The company has been in business for 17 years and has served clients in all of Washington state as well as 10+ other states. As a Medicare broker, Ms. Houle is able to represent and compare all the highly rated and recognized insurance companies providing all available Medicare products. The goal of My Medicare Solution is to assist each client in finding an insurance solution that fits their unique needs and make sure that they understand their options and choose a plan that works for them through one-on-one meetings and group presentations. She also provides support for her members all throughout the year and continues to make sure their plan fits year after year.

Brian Isaacson is an attorney with Washington Elder Law PLLC in Edmonds. Mr. Isaacson is a native of the Pacific Northwest and has been practicing law for over 20 years. He focuses on the areas of elder law, Medicaid planning, estate planning, IRA planning, tax planning, and stock option planning. Holding a masters of law degree in Taxation, he is a certified Attorney/CPA, and he is highly respected nationwide in the legal and tax community for his extensive and sophisticated work in tax litigation. An active member of the American Academy of Attorney-CPAs and president of its Washington State chapter, Mr. Isaacson approaches his work with great energy and serves his clients with respect and compassion. He is a member of the American Bar Association Tax Section, the National Academy of Elder Law Attorneys, and Lawyers With Purpose. Mr. Isaacson is a sought-after speaker and has co-authored several books on wealth preservation, including *Don't Go Broke in a Nursing Home; Protect Your IRA—Avoid the 5 Common Mistakes;* and *Tax Free Money For Long-Term Care*.

Scott Terry is an attorney with Terry Law firm in Sumner. His main areas of practice are estate planning and personal injury. Mr. Terry is a local attorney who grew up in Des Moines, Washington. After graduating from Brigham Young University in 1986, he attended Seattle University School of Law. Mr. Terry has worked as a legal analyst on NW Cable News, as a pro tem judge, and has represented clients in more than 40 jury trials. With more than 30 years of practicing law, he is confident in the legal services he provides in Washington.

Travis Pierce is an attorney with Inland Northwest Estate Planning and Elder Law, PLLC, in Spokane Valley. His practice focuses exclusively on elder law and estate planning. He has been an attorney since 1998 and practicing in the state of Washington since 2014. Mr. Pierce is a graduate of Lewis and Clark School of Law in Portland, Oregon. In addition to his JD degree, he earned an LLM (Masters in Law) with Distinction in Elder Law from Stetson University. Mr. Pierce is an active member of the National Association of Elder Law Attorneys and the Washington Association of Elder Law Attorneys.

Aaron Paker follows a trinitarian (not Trinitarian) approach to life based around a core value of Love, including in his legal work. This approach can best be summarized as an overarching belief in Ubuntu ("I am because you are"); an interpersonal commitment to love everyone; and an intrapersonal faith in the value of a "Givers Gain" mentality. His family life, friendships, social services, and legal work are all centered on this idea of treating everyone with respect and love and doing all that he can to improve their lives. To Mr. Paker, a client is not a source of income or another face in the crowd. He prides himself on patiently listening to stories that are completely unrelated to the work he is doing, but that are important for the client to share with someone; keeping in touch after the work is done and ensuring that he puts the extra mile in, even at the expense of the profit margin. It is this need to improve lives that drew him to specialize in crisis cases, typically Medicaid or Medicaid alternatives and probate.. Mr. Paker has been doing Medicaid work for about 10 years, starting as a paralegal and working his way through Seattle University School of Law as a part-time evening student. He graduated *cum laude*, with special honors, in his Elder Law and Advanced Elder Law classes, has self-published a guide to Medicaid with over 1,300 copies distributed in the first 2 years, and has successfully filed over 1,000 Medicaid applications.

Credit Information

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