



Medicaid Planning: From A to Z (2014)

K. Gabriel Heiser

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If you wish to advise clients how to qualify for nursing home Medicaid while protecting their assets, this is the definitive book! Written by an elder law attorney with over 25 years of experience, this manual is the professional edition version of attorney Heiser's best-selling Medicaid Secrets book. This manual is geared toward attorneys, accountants, and financial advisors seeking up-to-date and accessible information on the Medicaid program rules as well as a complete analysis of available Medicaid asset protection techniques for their clients. Includes a summary of all income and asset rules for both married and single individuals, together with numerous examples and several case studies, which take the planner through the same thought processes that an experienced elder law attorney would go through when analyzing a real-life client's situation. The book includes tips on: how to title the home so the client does not lose it to the state; how to make transfers to family members that won't disqualify the client from Medicaid; how "Medicaid annuities" work to make assets "disappear" for Medicaid eligibility purposes; clever ideas for "spending down" assets; what to change in a client's will to save thousands of dollars if the spouse ever needs nursing home care; avoiding the state's reimbursement claim following the nursing home resident's death; and much more. The 2014 Edition has been expanded, revised, and completely updated to incorporate all changes in the law as of January 31, 2014, and includes two chapters on Veterans' benefits as well as a 39-page Ethics of Elder Law section. Completely annotated with all case citations and statutory references given in over 500 footnotes. Also includes full copies of relevant statutes and a sample filled-out Medicaid application, plus sample clauses for deeds, wills, powers of attorney, etc.

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