

FINANCIAL PROFESSIONALS

Enhance Your Career with the

Elder Law Boot Camp

Presented by:

Certified Elder Law Attorney *
Jeffrey R. Bellomo, Esquire

*certified by the National Elder Law Foundation under authorization of the Pennsylvania Supreme Court

6 HOURS FREE CONTINUING EDUCATION CREDITS*

FRIDAY, NOVEMBER 15, 2019 8:00 am - 3:30 pm

*Accreditation approved by the Certified Financial Planner Board of Standards, Inc.,
the Pennsylvania Insurance Department and the State Board of Accountancy.

Seating is limited

Register Today to ensure your seat!!

Phone: 717-845-5390

Fax: 717-845-5408

Send your registration to our fax 24 hours a day.

Email: llarkin@bellomoassociates.com

Mail: Bellomo & Associates, LLC

3198 East Market Street, York PA 17402

Website Registration: www.bellomoassociates.com

We will contact you to confirm receipt.

Event Hosted by:

Misericordia Nursing &
Rehabilitation Center

998 S Russell Street

York, PA 17402



REGISTRATION FORM

PLEASE PRINT INFORMATION FOR EACH REGISTRANT:

Name: _____

Occupation: _____

Firm: _____

Address where the certificate should be mailed:

Bus. Tel: _____

Email: _____

Special Dietary Needs _____

License Type: _____ License Number: _____

Course Agenda

Registration

& Continental Breakfast - 7:30 am.

Estate Planning Overview- 8:00 am.

- * What is Estate Planning?
- * Alive & Well, Incapacitated, Death
- * Who needs Estate Planning?
- * The Planning Pyramid
- * 2 Finger Test
- * 3 Lands

Pre-Planning

- * Managing Incapacity
- * Power of Attorney
- * Guardianship Process
- * Using a Trust
- * Civil Commitment
- * Protecting Against Exploitation

Advance Directives

- * Definitions
- * End Stage Medical Condition
- * Life Sustaining Treatment
- * Types of Advance Directives
- * Who makes decisions?
- * Issues

Wills and Trusts

- * How do you own your assets?
- * Comprehensive Plan
- * What is a trust?
- * Key to an Effective Estate Plan
- * Grantor vs. Non-Grantor
- * Revocable Trust
- * Trust Types
- * Irrevocable Grantor Trust
- * Trustee
- * How Trusts Can Avoid Problems
- * Beneficiary Designations

Care Options

- * Activities of Daily Living
- * Nursing Homes/Cost of Care
- * How to Pay for Care
- * Government Benefits

Special Needs Planning

- * Government Programs
- * Guardianship Review
- * Special Needs Trust
- * Support Trust
- * Living Trust vs. Testamentary Trust
- * Third Party Special Needs Trust
- * Self-Settled Special Needs Trust

Special Needs Planning (continued)

- * ABLE Accounts
- * Pooled Trust
- * What Should I Do Next?

Caregiver Support

- * Family Caregivers & Third Party
- * Caregiver Statistics
- * Caregiver Agreements
- * Expectations of Parties
- * Services
- * Compensation
- * Taxes

Veterans Aid & Attendance Benefits

- * Who's Eligible?
- * Military Service Requirements
- * Care Need Requirements
- * Financial Requirements
- * Maximum Rates
- * Unreimbursed Medical Expenses
- * Transfer of Assets to Qualify
- * Trusts & VA Planning

Lunch - Provided

Medicaid

- * Definition & Requirements
- * After Qualification
- * Common Exempt Resources
- * Asset Transfers
- * Gifts
- * Look-Back Period
- * Community Spouse Resource Allowance
- * Monthly Maintenance Needs Allowance
- * DHS-Allowed Annuity
- * Waiver in PA

Crisis Planning

- * Medicaid Crisis: Spouse
- * Medicaid Crisis: Single/Widow/Widower
- * Pre-planning vs. Crisis Planning
- * Crisis Plan for Married Couple

Death of a Loved One

- * What Survivors Need to Do
- * Organ Donations/Anatomical Gifts
- * Autopsy Rights

Handling Estate Assets & Administration

- * Testate & Intestate
- * Important Issues
- * What are the Assets?
- * How Assets are Titled/Beneficiary Designated
- * Is Will valid?
- * Probate of Will
- * Legal Advertising
- * Notice of Estate Administration
- * Inheritance Tax Return
- * Distributing Assets
- * Trust Administration
- * PA Inheritance Tax
- * Will Contests

Digital Assets

- * Devices
- * Online Accounts & Portals
- * Social Media
- * Entertainment
- * Rights
- * Safeguards

Answer to Case Study, Questions and Closing – 3:30 pm.

JEFFREY R. BELLOMO, Attorney at Law

Jeffrey R. Bellomo, Esquire is a Certified Elder Law Attorney by the National Elder Law Foundation under authorization of the Pennsylvania Supreme Court. He received an LLM in Taxation and Estate Planning Certificate from Temple University School of Law. Jeff received a B.A. degree with a program of emphasis in Political Communication, with honors, from Juniata College. He received his Juris Doctor from Widener University School of Law. He then clerked for the Honorable David L. Ashworth of the Lancaster Court of Common Pleas. Jeff is admitted to the Bar of the Supreme Court of the United States and the Bar of the Supreme Court of Pennsylvania, as well as the U.S. District Court for the Middle District of Pennsylvania. He is a member of the Pennsylvania and York County Bar Associations.

Jeff is a National speaker, teaching attorneys across the country the legal technical aspects of Estate Planning and Elder Law as well as how to run an Estate Planning and Elder Law Practice. He also serves as a business coach to several attorneys in the United States. He is an active member of the Juniata College Alumni Association. Jeff is currently the Solicitor for the Treasurer's Office of the County of York and the Center for Independent Living Opportunities.