

# 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

**6 HOURS FREE CONTINUING EDUCATION CREDITS\***

**FRIDAY, MAY 29, 2020 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](http://www.bellomoassociates.com)

**We will contact you to confirm receipt.**

*Event Hosted*



544 North Penry Road  
Manheim, PA 17545



### 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

## Break

## 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
- \* **Secure Act Discussion**

## Care Options

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

## 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

## Break

## 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.