

Course Agenda

Registration & Continental Breakfast - 7:30 am.

Estate Planning Overview- 8:00 am. 30 Min.

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

Pre-Planning - 8:30 am. 30 min.

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

Advance Directives 9:00 am. 30 min.

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

Break 9:30 am. 15 min.

Wills and Trusts 9:45 am. 30 min.

- * 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 10:15 am. 30 min.

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

Caregiver Support 10:45 am. 20 min

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

Veterans Aid & Attendance Benefits 11:05 am. 30 min.

- * 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 11:35 am. 1 hour

Medicaid 12:35 pm. 60 min.

- * 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 1:35 pm. 30 min.

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

Break 2:05pm 15 min.

Death of a Loved One 2:20 pm. 20 min.

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

Handling Estate Assets & Administration 2:40 pm. 20 min.

- * 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 3:00 pm. 10 min.

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

Collaboration 3:10 pm. 10 min

Answer to Case Study, Questions 3:20 pm. 10 min.

Closing 3:30 pm.