

COURSE *Agenda*

Registration Continental Breakfast – 7:30AM

Estate Planning Overview – 8AM

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

Pre-Planning – 8:30AM

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

Advance Directives – 9AM

- Definitions
- End Stage Medical Condition
- Life-Sustaining Treatment
- Types of Advance Directives
- Who Makes Decisions?
- Issues

Break – 9:30AM

Wills & Trusts – 9:45AM

- 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
- Funding The Trust

Care Options – 10:15AM

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

Caregiver Support – 10:45AM

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

Veterans Aid & Attendance Benefits – 11AM

- 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 – 11:35AM

Medicaid – 12:35PM

- 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
- Government Benefits

Crisis Planning – 1:35PM

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

Break – 2:05PM

Death of a Loved One – 2:20PM

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

Handling Estate Assets & Administration – 2:40PM

- 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 – 3PM

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

Collaboration – 3:10PM

Answer to Case Study & Questions – 3:20PM

Closing – 3:30PM