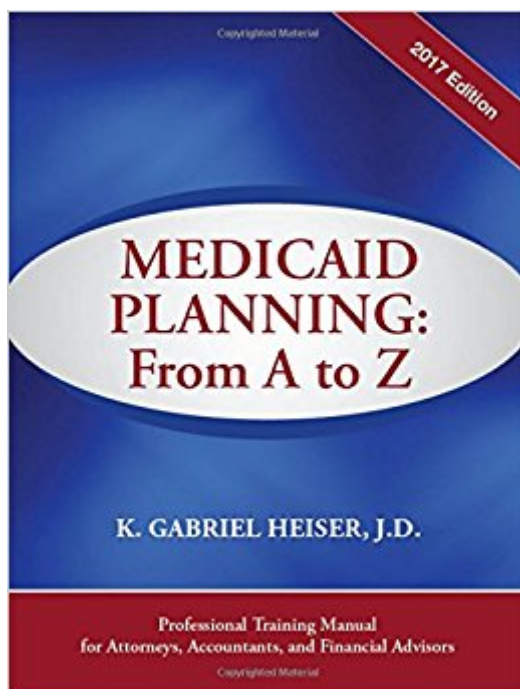


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# Medicaid Planning: A To Z (2017 Ed.)



## Synopsis

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 2017 Edition has been revised and completely updated to incorporate all changes in the law as of January 1, 2017, 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 550 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.

## Book Information

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## Customer Reviews

If your client (or a loved one) is facing the extremely high expenses of a long-term stay in a nursing home, and you want to be prepared to advise them of the rules and techniques of qualifying for Medicaid in a nursing home or assisted living, this is the book for you. Through numerous examples and case studies, the book takes you by the hand to first explain what the rules are and then--most importantly--what strategies are available to you to save your client potentially hundreds of thousands of dollars. You will also learn which "facts" are really myths and the many frequent mistakes to avoid. I have poured my 25 years' experience as an estate planning and elder law attorney into this book, so that you will know what you are up against. Good luck! K. Gabriel Heiser

K. Gabriel Heiser, J.D., focused exclusively on estate planning and Medicaid eligibility planning, including trusts, estates, gifts, and related tax issues, after graduating from Boston University School of Law in 1983. He also practiced in Massachusetts, where he was Chairman of the Estate Planning Committee of the Massachusetts Bar Association, and in Tennessee, where he was the founder and first Chairman of the Nashville Bar Association's Estate Planning Committee and where he served as President of the Middle Tennessee Planned Giving Council (1997). Although recently retired from the active practice of law, during his 25-year career he was a member of the National Academy of Elder Law Attorneys (NAELA), an ACTEC Fellow--the highest designation for trust and estate attorneys in the U.S. --and was AV<sup>®</sup>-rated by Martindale-Hubbell<sup>®</sup>, the country's preeminent lawyer rating service. Attorney Heiser has been a frequent seminar leader and participant in the areas of estate and gift tax, charitable gifts and trusts, Medicaid eligibility planning, and sophisticated estate planning. He has taught as a member of the Adjunct Faculty of the College for Financial Planning at David Lipscomb University, as an instructor in Estate Planning Law (1996-1998), and has been certified as an Estate Planning Law Specialist by The Estate Law Specialist Board, Inc., the only American Bar Association--accredited program for certification of an attorney as an estate planning specialist.

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