After-65 Second Chances

For Inheritances and Long-Term Care Planning

Page 1 – So Many Scenarios

- Many scenarios + no crystal balls

  = difficulty in planning ahead

- Which scenario do we plan for?

- Which do we sacrifice?

Page 1 – Timelines

- Aging out of planning options may help clients plan
- Use timelines to show clients when options will be GONE
- The elder law attorney is more important than ever

Page 2 – Tell Clients. . .

- What can we do?
- The elder law attorney's ongoing role *is NEEDED*
- ***Bring them back*** – no longer one-and-done planning
- Changes in circumstances change planning options—and circumstances keep changing

Page 2 – Future Steps

** Plan Maintenance * Adjustments * Fine-Tuning Plans * Revisiting Choices * Upgrading Plans * Monitoring Timelines and Changing Circumstances * Revisiting Documents and Plans * Keeping an Eye on the "Time to STOP Planning Horizon"*

Page 2 – Disappearing Options

d4A – "Under-65 Disability Trusts"

Medicare options

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