Protecting and Maximizing Public Benefits

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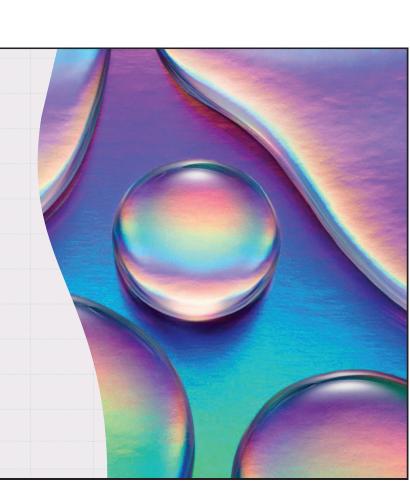
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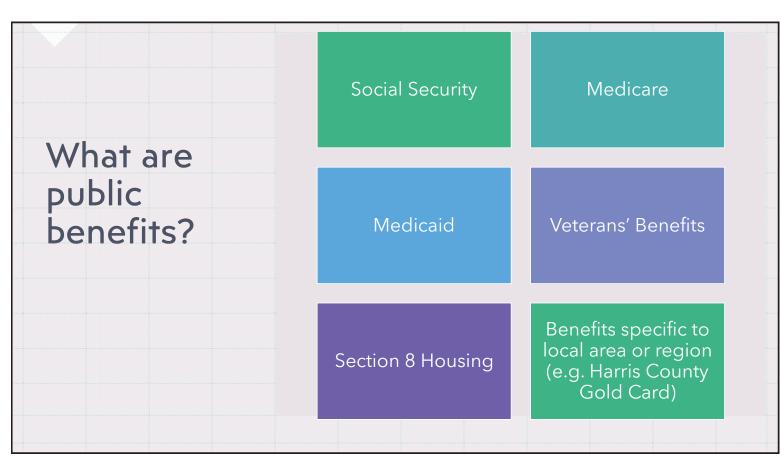
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1







The Recipe of Public Benefits Income test Asset test Where is client living? Medical requirement 109* different kinds of Medicaid programs

| | Community Spouse - a married couple, the spouse not in the nursing home |
|------------|--|
| | Institutionalized Spouse - a married couple, the spouse in the nursing home |
| Some terms | Look Back Period- 5-year look back period for long-term care Medicaid/ 3 years for Social Security (SSI) benefits |
| to know | Look Back Period and Penalty Period are not the same thing! |
| | Penalty Period- Medicaid penalizes (loss of Medicaid eligibility) applicants fo giving away assets (penalty period is calculated by the amount transferred divided by the transfer divisor) |
| | Deeming- term by Social Security to describe the process of considering another person's income or assets to be available to the applicant when applying for benefits (SSI typically) |
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Title search: Maximizing Public Benefits: Overview

Also available as part of the eCourse

<u>Answer Bar: Considering a Special Needs Trust</u>

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