Outline

Guardianships:
What You Need to Know About Legal Capacity
Circumstances where an Article 81 Guardianship is needed
When should a nursing home bring a guardianship?
The rights of the Alleged Incapacitated Person (AIP)
Knowing your role: the petitioner, court evaluator, counsel to AIP and the judge
Guardianship of the person and the property
Turnover proceedings: Protecting seniors from financial abuse

Why Everyone Needs Advance Directives
Can a senior diagnosed with dementia or Alzheimer's draft advanced directives?
New York's New Durable Power of Attorney – goes into effect June 13, 2021
An agent's fiduciary obligations Under POA
Health Care Proxy
Living Wills
DNR
MOLST

Special Needs Patients
How to protect a special needs child
Supplemental Needs Trusts for disabled individuals under 65 years old
Medicaid Waiver Program: Office for People with Developmental Disabilities (OPWDD) and Traumatic Brain Injury (TBI)

Elder Abuse, Neglect and Exploitation
Types & signs of elder abuse
Prevention
Protective placement
Mandatory reporting

Medicaid Payment for Long-Term Care:
Qualifying for Benefits and What to Watch For
Care at home & facilities
What about assisted living facilities?
Basic eligibility rules: Individuals & Couples
Pooled Income Trust
Treatment of certain assets: Home, retirement accounts, trusts
Exempt transfers
Gifts: Penalty periods
Application process
Estate recovery

New Developments in Community Medicaid
What changed on October 1, 2020 in NYS?
New Community Medicaid Lookback Period
Change in assessment process
Spousal refusal: Safe for now

Live Webinar Schedule
(Times listed in Eastern)
8:00 Program begins
11:50-1:00 Lunch Break
4:00 Program ends
There will be two 15-min breaks (mid-morning & mid-afternoon).
Actual lunch and break start times are at the discretion of the speaker.
A more detailed schedule is available upon request.

Objectives

1. Investigate how Medicaid planning can help elderly people qualify for Medicaid home-care and nursing-home benefits.
2. Analyze pitfalls in preparing and submitting Medicaid applications.
3. Evaluate the role of advance directives in legally and ethically ascertaining patients' preferences for care and ensuring their wishes are carried out.
4. Determine how a Healthcare Proxy can be utilized to empower another person to make decisions in the event someone is unable to make or communicate decisions about their own medical care.
5. Investigate Medicaid Waiver Programs for disabled individuals under 65 years of age.
6. Evaluate your responsibilities as a mandatory reporter when you have suspicions of elder abuse.

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The Complete Guide to Legal, Financial and Care Needs of Geriatric Patients

You're on the front lines with elderly patients and their families.

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But the confusing landscape of legal and financial issues is constantly changing. If you don't stay up to date you could give incorrect guidance or fail to refer clients to the proper resources, costing them the assistance they so desperately need.

Jessica Wilson, JD knows how puzzling the regulatory maze can be. But as an attorney concentrating her practice on the legal issues facing older adults and their families, she's an expert in elder law and estate planning.

Join Attorney Wilson for this one-day training as she shares critical information and updates on both common and complex issues related to:

- Medicaid eligibility
- Difference between Medicare and Medicaid
- Advance Directives: Health Care Proxy, Living Will
- Guardianship Proceedings
- Elder Abuse
- New York's New Power of Attorney Law

Sign up today, get the most current information, and feel confident in your ability to provide the advice and support your elderly patients need!

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Meet Your Speaker

Jessica Wilson, J.D, is an attorney who concentrates her legal practice in estate planning, probate and elder law. Attorney Wilson helps clients unravel their complicated feelings toward death, aging and inheritance so they can put together a comprehensive estate plan. As an advocate for the elderly and their families, she handles a wide range of legal matters including long term care planning, guardianship, Medicaid and issues related to healthcare.

Attorney Wilson earned her J.D. degree from Lewis & Clark School of Law and is a member of the Kings County and New York County bar associations, the Part 36 Guardianship Panel, and the National Academy of Elder Law Attorneys.

Speaker Disclosure:
Financial: Jessica Wilson is the founder of the Law Office of Jessica Wilson, PC. She receives a speaking honorarium from PESI, Inc.
Non-financial: Jessica Wilson is a member of the National Academy of Elder Law Attorneys (NAELA); the New York City Bar Association; and the Brooklyn Bar Association.

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Andrea Brandt, PhD, MFT
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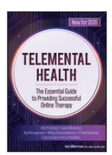

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