

February 13, 2012 12:00PM-1:00 PM for Montgomery County Estates and Trusts Section- Closed Meeting

Elder Law for Estates Planners - The Intersection between Estate Planning and Medicaid Planning – How to Identify and Balance the Competing Needs

Elderly clients have unique issues to address in their estate planning – from competency to execute documents to Medicaid planning to legacy through bequests. In addition to good lawyering skills, each estate planner should consider how to help the client identify and achieve their objectives and protect them from mistakes or misunderstandings while promoting good tax, Medicaid and asset protection strategies.
