

**Vermont Bar Association
Elder Law Day – VBA Elder Law Section
November 9th & 10th, 2020**

Day 1 - 11/9/20

11:30am - 12:30pm

- I. Pre-Crisis Planning: Traditional Estate Planning with Elder Law Focus
(Jennifer Luitjens)
(Durable Powers of Attorney, Advance Directives, DNR/COLST, Patient Choice at End of Life, Hospice, Long-term care insurance, Transfer options)

2:30pm - 3:30pm

- II. Special Needs Trusts
(Jim Caffry)
(1st and 3rd party special needs/supplemental needs trusts, Transfers to individuals with special needs in Medicaid planning context, ABLE accounts)

Day 2 - 11/10/20

10:00am - 11:00am

- III. Basic Medicaid Eligibility: Crisis Planning and Long-term Care Medicaid Overview
(Ellen LaPlante)
(Choices for Care settings, Medicaid basic eligibility – medical and financial, Countable and exempt resources, Irrevocable Trusts)

11:30am - 12:30pm

- IV. Advanced Medicaid Planning: Asset Preservation
(Mike Caccavo)
(Life estate deeds, Annuities, Promissory notes, Retirement accounts, Exempt transfers)

2:30pm - 3:30pm

- V. Post-Eligibility Issues: Estate Recovery and Protection of the Community Spouse
(Peter Potts)
(Required actions after Medicaid eligibility, Planning for spouse in order to preserve assets, Estate recovery)