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**Title:** Medicaid Planning After the Deficit Reduction Act  
**Speaker:** Michael Redden  
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Date: Thursday, January 3, 2019  
Time: 7:00 AM Sign-in/Networking  
7:15 AM Breakfast Buffet Open  
7:30 AM Announcements  
8:00 AM – 9:00 AM Presentation  
9:00 AM – 9:10 AM Break  
9:10 AM – 9:40 AM Presentation

**Location: Hellmuth & Johnson Building**  
4th Floor Conference Room  
8050 West 78th Street, Edina, MN 55439

Attendance Fees: FSP Members: \$40  
Nonmember first-time attendance: \$40  
Nonmember repeat attendance: \$50  
Walk-in: \$10 surcharge over registration fee  
Sponsor: Per benefit package  
Registrations received after 12/31/18: \$10 surcharge over registration fee  
Pre-registration without payment and “No Show” at the program: \$40.00  
Refunds: No refunds for cancellations received after 12/31/18

**CE Credits:** This educational offering is APPROVED by the Minnesota Commissioner of Commerce as satisfying 1.5 hours of Standard classroom credit toward continuing insurance education requirements.  
**CFP:** 1.5 hours APPROVED Standard credits.

CLE: 1.5 hours APPROVED Standard credits.  
A certificate of attendance is available for individuals requesting CPE and PRP (Professional Recertification Program – formerly PACE) credits.

**Who Should Attend:** Estate planners, financial planners, investment advisors, insurance producers, retirement counselors, CPAs and JDs

**Level of Educational Complexity:** Intermediate

### **Course Description**

This presentation will cover Medical Assistance Planning. Specific time will be spent on changes due to the passage of the Deficit Reduction Act and the court case of Geston v. Anderson. Financial products and legal structures designed to plan for the financial and legal realities of Medical Assistance Planning will be discussed. Case Studies will also be examined to illustrate practical use in planning.

### **Learning Objectives**

1. Understand the basics of Medical Assistance Planning
2. Understand where Minnesota has successfully implemented the DRA and where it is not compliant.
3. Understand tools and options available to clients and client families.
4. Ability to put together a basic Medical Assistance Plan.

### **Outline**

- 0-10 min: Introduction to Medicaid and Planning
- 10-20 min: Deficit Reduction Act, Geston v. Anderson, Implementation in Minnesota
- 20-40 min: Definition of Crisis and Traditional Planning, Overview of Eligibility
- 40-50 min: Estate Recovery Basics - Estate Recovery Handout
- 50-60 min: Traditional Planning and Case Study
- 60-80 min: Crisis Planning, Medicaid Compliant Annuities, Case Study 1 and 2
- 80-90 min: Questions

**Instructional Materials for Students** PPT in handout format

**Examination & Answers** No exam