



Syllabus for Continuing Education Program

Program Provider: Society of Financial Service Professionals Twin Cities

(MN Dept. of Commerce Provider #8724)

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Title: More than Just Selling a Long Term Care Policy: Understanding the Long Term Care Continuum and How to Pay from the Elder Law Perspective

Speaker: Mary Frances Price, Shareholder and Attorney at Law

Long, Reher, Hanson and Price, PA

5881 Cedar Lake Road

Minneapolis, MN 55416

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Date: Thursday, March 5, 2020

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 2/28/20: \$10 surcharge over registration fee
Pre-registration without payment and “No Show” at the program: \$40.00
Refunds: No refunds for cancellations received after 2/28/20

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: Advanced

Course Description

Mary Frances Price, elder law attorney with Long, Reher, Hanson and Price, PA, will share her experience working with aging clients regarding how to assist them with evaluating the various types of senior housing available including, assisted living, memory care, and nursing homes. She will also discuss how you can become better informed about the legal licensing differences in the elder law and elder care arena and why it matters to your client. Mary Frances will go on to describe the various public and private sources people use in combination to pay for long-term care and other unreimbursed medical expenses including eligibility factors such as assets limits, military service record, treatment of spousal income and characterization of exempt and available assets; and finally to understand legally permissible advanced planning strategies for asset protection, income protection for a well-spouse and how to position assets in light of current Medicaid and Veterans Rules and Laws.

Learning Objectives

- To understand the various types of senior housing available including assisted living, memory care and nursing home as well as the legal licensing differences and why it matters to your client;
- To understand the various public and private sources people use in combination to pay for long-term care and other unreimbursed medical expenses including eligibility factors such as assets limits, military service record, treatment of spousal income and characterization of exempt and available assets;
- To understand legally permissible advanced planning strategies for asset protection, income protection for a well-spouse and how to position assets in light of current Medicaid and Veterans Rules and Laws.

Outline

• The Story of Bob and Ruth	5 minutes
• Issue Spotting for Financial Professionals	10 Minutes
• Getting/Staying Organized	1 minute
• Health Organization	3 Minutes
• Financial	1 Minute
• Assessment of Needs	10 Minutes
• Level of Care Variances	5 Minutes
• Elder Care Continuum	4 Minutes
• Zone of Danger	
• Identify Resources	1 Minutes
• Veterans Benefits	10 Minute
• Veterans Benefits	10 Minutes
• Veterans Benefits	5 Minutes
• Veterans Benefits	5 Minutes
• Medicaid (Medical Assistance)	5 Minutes
• Assisted Care vs. Skilled Care Facilities	5 Minutes
• Summary	10 Minutes

TOTAL TIME:

90 Minutes (1.5 hours)

Instructional Materials for Students None

Examination & Answers No exam