FREE ESTATE PLANNING WEBINAR

APRIL 21, 2021 | 4 PM

BASIC ESTATE PLANNING

REGISTER ONLINE

For many people, the pandemic has sparked a renewed and urgent interest in estate planning, including creating, updating, and/or finalizing estate planning documents. Whether you're starting a new family or preparing for retirement, it may be time to address these issues and draft or update your will.

This seminar will mainly focus on the essential estate planning documents such as a last will and testament, power of attorney, living will and health care proxy. We will discuss strategies to minimize estate taxes, avoid probate, Medicaid eligibility requirements, the Medicaid look back period, home care options, veteran's benefits, and strategies to protect one's home.

- Power of attorney and why it is such an important, powerful and necessary planning tool.
- Spousal refusal and why a healthy spouse should not run out of money caring for the ill spouse.
- Homecare Medicaid eligibility rules and how it's possible to keep your loved one at home, with homecare and how not to run out of money.
- Income or pension trust and how one can protect assets as well as one's income including a pension, social security, while receiving Medicaid homecare benefits.
- Veterans benefits and the eligibility requirements.
- Trusts and how to protect your most valuable asset, your home.
- Current estate tax rules and how to develop an estate plan that will avoid probate and minimize estate taxes.