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PRACTICING EXCLUSIVELY IN:
ELDER LAW
ASSET PROTECTION
MEDICAID & NURSING HOME PLANNING
ESTATE PLANNING
DISABILITY PLANNING
MEDICAID APPLICATIONS
GUARDIANSHIP
WILLS & TRUSTS
ESTATE ADMINISTRATION

ELA Alert

July 23, 2007

Please deliver to: Admissions Dir., Administrator,
Social Work Dept., and Medicaid Coordinator

Deficit Reduction Act of 2005 Update

Who is Hurt by Recent Changes in Look-Back and Penalty Start Date

If a transfer is made to...

1. Help a grandchild pay for education
2. Help a family member with medical expenses
3. Help a family member who is out of work
4. Help a family member who is in a foreclosure action
5. Help a family member in a divorce matter
6. Help a grandchild who is purchasing a first home
7. Help a family member who is starting a business
8. Help a family member whose business is failing
9. Pay for a family vacation
10. Help with living expenses of a child
11. Help out a caregiver child with the general living expenses of the parent living in the child's home
12. Help out a child who is caring for a parent in the parent's home
13. Contribute to a church
14. Contribute to a charity
15. Cash spent on a consumer scam not reported to police
16. Contribute to a high school or college
17. Anyone, with no written record to support it
18. Support a political party
19. Pay for a granddaughter's wedding
20. Pay for a child's emergency house repair
21. Convey the family farm to family members

... then the Medicaid applicant may face a disqualification period.

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