

Michael J. Millonig, Attorney At Law
Certified as an Elder Law Attorney by the
National Elder Law Foundation since 1998
OSBA Board Certified Estate Planning
Trust and Probate Specialist
CPA Inactive

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ASSET PROTECTION PLANNING
FOR NURSING HOME COSTS

Friday, October 14, 2016 @ 8:30 AM - 11:45 AM

The Ohio Medicaid program has just had a major change; the most dramatic since its inception in 1972. Ohio has terminated its 209(b) status and converted to an SSI/1634 State. This means that all the eligibility rules are now different along with the Medicaid application process. These changes went into effect on August 1, 2016.

- ▶ Review of all new changes resulting from Ohio's conversion to an SSI/1634 State
- ▶ Review all new resource eligibility rules
- ▶ NEW Miller Trusts (aka Qualified Income Trusts)
- ▶ Possible loss of eligibility for current Medicaid recipients
- ▶ Miller Trusts for AL Waiver residents
- ▶ New rule for Residence exemption
- ▶ NEW Medicaid treatment of pension plans & IRA's
- ▶ Medicaid Transfer rule; more changes!
- ▶ Resource exemptions for the community spouse (spouse at home)
- ▶ Restrictions on Medicaid annuities but new opportunities!
- ▶ Annuities used for planning & related malpractice of agents
- ▶ Medicaid Transfer rule; not just 5 years but an ineligibility period beginning after spend down!
- ▶ Office procedures to avoid malpractice
- ▶ Long Term Care Insurance for nursing home costs
- ▶ Additional Medicaid exemptions for persons with Partnership Plan Policies
- ▶ Assisted Living rules for Medicaid
- ▶ Planning options to protect the estate and qualify for Medicaid
- ▶ Why your clients should not be giving their assets to their children
- ▶ Special Needs Trusts under Medicaid law

OHIO TRUST CODE

(also approved as "The Complete Trust Course")

Friday, October 14, 2016 @ 1:15 PM - 4:30 PM

- ▶ The State of Ohio enacted a comprehensive trust statute in 2007 that replaces prior Ohio trust law. This presentation will review relevant provisions and how they affect estate planning with trusts.
- ▶ All existing trusts are also affected by this law.
- ▶ New rights for beneficiaries that apply even if contrary to the trust.
- ▶ Comprehensive Review of a Trust Document
- ▶ Explaining Trusts to Clients; Trust Terminology
- ▶ A-B Trusts, Life Insurance Trusts, Dynasty Trusts, Revocable Living Trusts
- ▶ Gun Trusts and many other different types of trusts will be covered
- ▶ Estate tax planning under the higher exclusion amount (\$5,450,000 for 2016)
- ▶ A-B Trusts and the new portability of the estate tax exclusion
- ▶ Asset Protection Trusts to protect clients from lawsuits
- ▶ Ohio Legacy Trust Act: an asset protection trust under Ohio law
- ▶ Foreign Asset Protection Trusts under laws of other countries

Do your clients use Trusts in their estate planning? If so, you need to have a good understanding of trusts so you can intelligently discuss them with your clients.

OHIO LONG TERM CARE PARTNERSHIP TRAINING

Monday, October 17, 2016 @ 1:00 PM - 5:15 PM

- ▶ Long Term Care Four Hour Partnership Training (Course # 49509) Presented by Attorney Michael J. Millonig and Randy Gallas, Owner of the Long Term Care Insurance Agency in Kettering, Ohio.
- ▶ This Mandatory Ohio 4 Hour Renewal Course is required in order to sell Long Term Care Insurance.
- ▶ Attendance at this course will satisfy your two (2) year mandatory Ohio Partnership Training requirement.

CONTINUING EDUCATION CREDIT

The above seminars have been approved for CE credit by Ohio Department of Insurance. There is no exam required to obtain CE credit. Michael Millonig LLC is registered with the Accountancy Board of Ohio as a Continuing Education Sponsor. The Asset Protection Planning for Nursing Home Costs and The Ohio Trust Code (“The Complete Trust Course”) are **each** approved for 3 CE Credits.

REFUND POLICY: Cancellations received by 5:00 PM two business days prior to the seminar will be refunded less a \$15 office fee. Those not attending will receive the course materials in full consideration of tuition paid.

TUITION: Tuition is \$60 per seminar if pre-registered and paid two business days prior to the day of the seminar. Registration on the day before or the day of the seminar is \$70.00. There is a discount if you pre-register for two courses (see below).

Reservations must be made in advance with payment. Please complete this application and remit payment to Michael Millonig LLC, Attn: CE Seminars, 7929 Washington Woods Drive, Dayton, Ohio 45459-4026. **Reserved seating is limited.** Seminars to be held at the Yankee Trace Golf Club, 10000 Yankee St., Centerville OH 45458 (937) 438-4653 (directions attached). Seminar materials will be provided. Call 438-3977 if you have any questions.

REGISTRATION FORM

Name & Position

Employer

Address

Daytime Phone

E-MAIL Address

Check desired registration(s) below:

_____ Asset Protection Planning For Nursing Home Costs
(Friday, October 14, 2016 @ 8:30 AM - 11:45 AM)

_____ The Ohio Trust Code (“The Complete Trust Course”)
(Friday, October 14, 2016 @ 1:15 PM - 4:30 PM)

_____ Ohio Long Term Care Partnership Training
(Monday, October 17, 2016 @ 1:00 PM - 5:15 PM)

_____ Preregister for one seminar. (Cost is \$ 60.00)

_____ Preregister for both seminars on **same** day. (Cost is \$100.00)

_____ Registration on the day before or the day of the seminar. (Cost is \$70.00)

CE Credits are for: _____ CPA _____ Insurance

NPN # _____

Mail Payment & Registration To: Michael Millonig LLC
Attn: CE Seminars
7929 Washington Woods Dr
Dayton, Ohio 45459-4026
937-438-3977

**Seminar location: Yankee Trace Golf Club, 10000 Yankee St.,
Centerville OH 45458**

MICHAEL MILLONIG LLC
DIRECTIONS TO SEMINAR
Location: Yankee Trace Golf Club
10000 Yankee Street
Centerville, Ohio 45458
(937) 438-4653

TRAVELING SOUTH ON I675

South on I-675 to Exit 2 (Route 725, Miamisburg-Centerville Road).
At end of the ramp, turn left onto Yankee St. heading South
Head 2.3 miles, and the Golf Club at Yankee Trace will be on the left.

TRAVELING NORTH ON I75

I-75 North to Exit 41 (Austin Boulevard).
At exit traffic light, turn right onto Austin Boulevard
Continue approximately 2 miles to Yankee Street.
Make a left onto Yankee Street. Clubhouse is on the right.

FROM FAR HILLS

Going South on Far Hills through Kettering to downtown Centerville
Turn right onto Franklin St. at downtown Centerville heading towards the Dayton Mall
Go past McEwen and Lyons Rd., just before the 675 overpass, Turn left heading South onto
Yankee St.
Head 2.3 miles, and the Golf Club at Yankee Trace will be on the left.