



Medi-Cal A-Z Agenda

June 12-13, 2017

The Southern California Institute
3636 Nobel Dr. #450, San Diego, CA 92122

Your potential clients may be unnecessarily spending down an estate built up over a lifetime, because they do not understand the asset and income preservation tools of long term care Medi-Cal Planning. In this two-day workshop, you will learn what you need to build a foundation, gain a reputation, and how to have Medi-Cal Planning drive the growth of your current practice.

We will cover the rules and strategies of Medi-Cal Planning. You will be brought up to speed and armed with the strategies to handle crisis planning, and begin taking on new clients.

Day 1 – Monday, June 12, 8:30 a.m. – 4:00 p.m. PT

8:00 a.m.

Breakfast (provided)

8:30 a.m.

Course Overview

What Does It Mean To Have a Medi-Cal Planning Practice?

Information Gathering

Estate Planning Documents Quick Review

10:15 a.m.

Break

10:30 a.m.

Basics of Medi-Cal

Current Medi-Cal Rules

Assets/Eligibility

Income/Share of Cost

Transfer Rules

Spousal Protection & Income Protection

Estate Recovery

HCBS Waiver Programs

12:00 p.m.

Lunch (on own)

1:00 p.m.

Crisis Planning Strategies

Conversion

Transfers/Gifts

Crisis Planning Strategies and Spousal Protection Rules

Increasing Community Spouse Resource Allowance through 3100 Proceedings

Lowering Share of cost through Support Orders

2:30 p.m.

Break

2:45 p.m.

Continue previous session

4:00 p.m.

Adjourn

Day 2 – Tuesday, June 13, 8:30 a.m. – 4:00 p.m. PT

8:00 a.m.

Breakfast (provided)

8:30 a.m.

Questions from Day 1

Conducting an Effective Initial Consultation

Preparing the Medi-Cal Package: Forms and Beyond

Steps

Application Process

Forms

Supporting Documents

10:15 a.m.

Break

10:30 a.m.

Continue preparing the Medi-Cal Package: Forms and Beyond

12:00 p.m.

Lunch (on own)

1:00 p.m.

Nursing Home Rights – Discharges and Transfers

Case Studies and Examples

2:30 p.m.

Break

2:45 p.m.

What a Successful Elder Law Practice looks like

Advocacy

Getting clients and referral sources

Marketing and pricing

4:00 p.m.

Adjourn