



Veterans Pension Immersion Camp

Agenda

March 1-2, 2018

Hilton Garden Inn Austin Downtown/Convention Center
Austin, TX

Prior to the Camp

- [Watch Entering VA Pension from the Ground Floor 3-part series](#)
- **Pre-Camp Fundamentals call** – Wednesday, February 14, 2:00 p.m. – 3:00 p.m. ET

Day 1 – Thursday, March 1, 1:00 p.m. – 5:30 p.m. CT

1:00 p.m.

VA Pension Eligibility Requirements

Covers the eligibility criteria for a VA Pension Claim, both for the veteran and a surviving spouse. Includes a detailed look at the “service” requirement and how to establish a claimant is a “surviving spouse.”

1:30 p.m.

Building a Solid Case - Medical Requirements for Pension, Aid and Attendance and Housebound Benefits

Discuss medical evidence necessary to qualify a veteran or surviving spouse for A&A or housebound pension benefits and how to begin documenting this evidence to support a claim.

2:45 p.m.

Break

3:00 p.m.

Financial Requirements for Aid and Attendance and Housebound Benefits

Explains the income and net worth requirements for benefits and how to properly document this evidence. Also learn how to calculate the benefit to which a claimant may be entitled.

3:45 p.m.

The Client Has Too Much Income and Too Many Assets – Now What?

Discuss planning strategies available to protect assets for a veteran, enabling him/her to qualify for VA benefits. Covers how trusts may (or may not) be used as an asset protection tool for VA pension benefits.

5:30 p.m.

One-hour reception at 18th Over Austin, sponsored by Krause Financial Services

Day 2 – Friday, March 2, 8:30 a.m. – 4:30 p.m. CT

8:00 a.m.

Breakfast (provided)

8:30 a.m.

Putting Your Knowledge to Work - Case Studies

Work through case studies in small groups, and then share findings with the class.

9:15 a.m.

Balancing VA Pension with Medicaid

What happens when a claimant qualifies for Medicaid? When should Medicaid be pursued rather than pension? These questions will be answered using a suggested process.

10:30 a.m.

Break

11:00 a.m.

How to Prepare a Claim that is Ready to Be Approved and Handing a Denial Letter

Learn which forms are needed to complete an application for VA Pension, how to complete those forms, and the proper documentation to submit with the claim. Understand what to do if a claim is denied, including an explanation of the appeals process.

12:15 p.m.

Lunch (on own)

1:15 p.m.

An Overview of Other Long Term Care Benefits Available Through the VA

Provides a brief overview of the long-term care programs available from the VA, including State Veterans Homes, and medical care and hospitalization.

2:15 p.m.

What Changes Are Coming to the VA Pension Rules?

Will there be a look-back or penalty period? This session takes a look at the proposed changes to the VA eligibility rules and what to do to prepare.

3:15 p.m.

Break

3:30 p.m.

Your First Steps to Incorporate VA Pension into Your Practice

How will you schedule appointments with potential pension clients? How will the conversation with potential clients take place? What do you want to earn from this area?

4:30 p.m.

Adjourn