

The Bristol County Estate Planning Council

Invites You to Our May Dinner Meeting



How and When to Use **Life Estates** as part of your **Medicaid Planning** Strategies

Every year Medicaid planning and the ability to obtain Mass Health becomes more and more difficult and this year is no exception. The use of life estates was always a staple in Medicaid planning. **However, in late 2015 a new Superior Court case dealing with life estates in conjunction with an irrevocable trust has changed the landscape in terms of the use of a life estate for Medicaid planning purposes.** So charge up your laptop and come and learn:

Presented by
Todd E. Lutsky Esq., LLM
Cushing and Dolan



- What a life estate is
- How to create a life estate with either:
 - The remainder interest to the kids
 - The remainder interest to an irrevocable trust
- The pros and cons associated with each
- The income gift and estate tax consequences of life estates and how best to use them
- How life estates work in Medicaid planning
- Ease of bill paying
- Retention of real estate tax abatements
- Review of the Daley vs. Nadeau Case
- Do life estates still work
- Control and creditor issues associated with the life estates in conjunction with how they are created

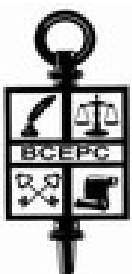
Must RSVP to:
<http://www.bcepc.net/events/event/12570>

May 19, 2016

5 – 8 pm

Dinner

\$30 Member/ \$40 Non-Member



Bristol
County
Estate Planning
Council



90 Paramount Dr
Raynham, MA