



TULLY & WINKELMAN, P.C.

*Rise in the presence of the aged,
show respect for the elderly...
Leviticus 19:32a*

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Memorandum: **What is Life Care Planning?**

The Life Care Plan is a new specialty of elder law emerging around the country. While traditional elder law or “medicaid planning” law firms focus on saving the elder’s money for the next generation, Life Care Planning law firms use the elder’s money to maximize his or her quality of life and independence. In essence, Life Care Planning helps people find and pay for good care for life by bundling asset protection, public benefits qualification, care coordination, nursing home advocacy and crisis intervention.

A Life Care Plan can provide the road map that allows an elder to follow through to achieve his quality of life and care and long-term care financing goals. There are three principal goals of the Life Care Plan that we help the elder and family develop and implement:

1. We help make sure that you or your loved one gets good care, whether that care is at home or outside the traditional home setting. This is the most important of all goals, for it goes to the very heart of your quality of life in your later years. Your Life Care Plan is focused first on your good health, safety, and well-being.
2. We help you make decisions relating to your long-term care and special needs. We are your resource of experienced, supportive, knowledgeable, and objective advisors.
3. We help you find sources to pay for good long-term care. We work with you through the maze of choices and options to find the best, or often, the most comfortable solution to the asset protection problem created by the need to pay for quality long-term care.

Your Care Questions Answered

As your loved one ages, we will continually help you answer your questions about your long-term care and health care choices:

- What health care, chronic care, and long-term care services are available to me? How can I get the good care I need and desire, whether in my own home, in a residential community or assisted-living facility, in a child's home, or in a nursing home?
- How will financial and health care decisions be made for me if I cannot make them for myself? Who can I rely on to make sure that decisions to be made are the right ones?
- If I can't take care of myself, who will make sure my spouse continues to have a good quality of life?
- If there a health care crisis, what will we have to do? Where do we turn for the help we need?
- How do I know I am getting good care? Who will advocate and intervene for me if necessary to ensure my right to quality health care and long-term care?



Your Legal and Financial Questions Answered

A Life Care Plan also helps you and your loved ones answer other pressing questions as well:

- How do I assure my financial security as I get older?
- What public benefits am I entitled to, and what do I have to do to qualify for them?
- Should I rely on Medicaid or other government benefits to help pay for my care? How do I apply for benefits?
- What kinds of insurance do I need? Should I buy long-term care insurance? Should I join a Medicare HMO?
- How and when should I distribute my assets? Can I save taxes and avoid probate?
- Do I have to spend all of my money on my care, whether in my home or in a residential care facility such as a nursing home? How can I protect my assets to take care of my spouse, to ensure I get good care, or to leave to my children?
- How do I provide for family members with special needs?

Who Benefits from Life Care Planning?

Any senior with a health condition that has the potential to impact their ability to care for themselves. Caregivers also benefit from the support offered by the Elder Care Coordinator in finding and securing quality care and having a knowledgeable person to turn to when problems arise.

What is an Elder Care Coordinator?

An Elder Care Coordinator is a professional, such as a social worker, counselor, nurse, or gerontologist who specializes in assisting older people and their families to attain the highest quality of life given their circumstances. An Elder Care Coordinator will:

- Help clients and families identify care problems and assist in solving them.
- Assist families in identifying and arranging in-home help or other services.
- Coordinate with medical and health providers.
- Review medical issues and offer referrals to other geriatric specialists to provide appropriate care while conserving financial resources.
- Provide support, guidance, and advocacy during a crisis.
- Help with coordinating transfer and transportation of an older person to or from a retirement complex, assisted care living facility, or nursing home.
- Provide education.
- Offer counseling and support.

The Life Care Plan utilizes the elder care continuum and connects your concerns about long-term health care as you go through the later stages of your life with the knowledge and expertise of an Elder Law Attorney and an Elder Care Coordinator who will be with you and your loved ones every step of the way to assist you in making the right choices.



This Memorandum is based on current law and is for informational purposes only. It is important that you discuss all legal options and consequences with a qualified elder law attorney prior to any action. Should you wish to discuss your situation with us, please call (631) 424-2800 for a consultation. For additional Memoranda, please call or visit our website at www.elderlaw.pro.

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