If you’ve ever wondered what the difference between a will and a trust was or what the importance of a power of attorney is then this is the place for you today. I’ll be speaking with Elder law attorney Mike Connor. Mike has an established Lafayette Hill, Pennsylvania practice, concentrating on elder law and estate planning issues as they relate to the concerns of older persons, individuals with disabilities and their families. Michael@connorelderlaw.com

1:05 Importance of Documents  
2:45 Having those conversations  
4:40 Wills  
6:41 Trusts  
7:28 Durable Power of Attorney (DPOA)  
9:49 Guardianship  
10:29 Obtaining POA  
12:55 Protecting assets  
13:52 Qualifying for Medicaid as a single person  
14:45 Qualifying for Medicaid Protecting Assets as married couple  
17:01 Medicaid Qualified Annuity  
18:24 Importance of working with an elder law attorney  
20:17 Medicaid and your house  
21:50 Medicaid and nursing homes  
23:38 Tour facilities/waiting list  
26:12 Geriatric Care Managers  
28:52 VA Benefit  
30:25 VA and Medicaid occurring at the same time  
31:42 Medicaid and home waiver  
33:13 Each state is separate  
34:24 Estate planning  
35:22 Supplemental Needs Trust  
36:12 Irrevocable Standalone Trust  
39:55 Dying without a will  
40:05 Dying in Testate  
43:16 Pre pay funeral  
43:53 Digital assets and not knowing what your parents bills/assets are  
45:57 Medical Information bureau - insurance policies
Penn Unclaimed Assets
Probate
Short Certificate for Executor letters of testamentary
Procedural steps executor has to take
Inheritance tax
Filing
If there is a disagreement on accounting for probate
Parent gets diagnosis what do you do?
County website - Area Agency on Aging

Agencies that were discussed:

Area Agency on Aging (Every county has it’s own chapter)
Medicare.gov
Geriatric care Manager National Association - www.aginglifecare.org

Medical Information Bureau - www.mib.com

Unclaimed Assets - Each state has it’s own website but this is the National Association of Unclaimed Property Administrators www.unclaimed.org

Mike Connor Bio -

Mr. Connor has an established Lafayette Hill practice concentrating on elder law and estate planning issues as they relate to the concerns of older persons, individuals with disabilities and their families. In addition, Mike offers estate planning assistance to younger individuals making healthcare, asset protection and testamentary decisions at a time when they can create a meaningful plan for protection and distribution of their assets to their children and other heirs.

Before establishing his law practice, Mike was executive director of Trinity Health Care Alliance, a joint venture of Doylestown, Grand View and North Penn Hospitals, a position that utilized his extensive background (over 20 years experience) in the hospital and health care management field. In addition, Mike formerly worked for two Philadelphia law firms before joining Trinity.
Michael Connor graduated from the Temple University School of Law (now known as the James E. Beasley Law School at Temple University), Evening Division, cum laude. Mike also earned a B.B.A. degree from Temple University. Mike is a member of the National Academy of Elder Law Attorneys (NAELA) and the Elder Law Section of the Pennsylvania Bar Association and the Elder Law Committee of the Montgomery County Bar Association.

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