

# DAUGHTERHOOD

## THE PODCAST

### Episode 1

#### Mike Connor - Elder Law - Show Notes

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](mailto: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

- 46:35. Penn Unclaimed Assets
- 46:56 Probate
- 47:50 Short Certificate for Executor letters of testamentary
- 48:30 Procedural steps executor has to take
- 49:41 Inheritance tax
- 50:37 Filing
- 51:32 If there is a disagreement on accounting for probate
- 52:47 Parent gets diagnosis what do you do?
- 54:20 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](http://www.aginglifecare.org)

Medical Information Bureau - [www.mib.com](http://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](http://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.

Website is [connorelderlaw.com](http://connorelderlaw.com)

Email: [michael@connorelderlaw.com](mailto:michael@connorelderlaw.com)