

# Medicaid Immersion and Practice-Building Camp

## Tentative Course Agenda

### Day One

- 8:30–9:00 **Understanding the Revenue Streams Available to You (aka “How Am I Going to Make Money Doing This”)**  
With a Medicaid practice, attorneys have choices about the type of practice to build. This session will discuss possible revenue streams available in a practice.
- 9:00–10:10 **The Big Picture**  
This session will provide an overview of the federal rules that apply to Medicaid and where to find them, important terms to know, income rules for spend down and income cap state for single persons and married couples and what a Miller Trust is and how it is used.
- 10:10–10:30 **Break**
- 10:30–12:10 **Countable Assets, Penalties and Exempt Transfers**  
This session will explore what is meant by countable and non-countable assets for purposes of Medicaid eligibility, the rules as they relate to gifting, what exempt transfers are allowed, and how to calculate the Community Spouse Resource Allowance (CSRA) and Minimum Monthly Maintenance Needs Allowance (MMMNA) for married couples.
- 12:10–1:30 **Lunch**
- 1:30–2:20 **Practical Application of the Medicaid rules**  
During this session, attendees will work through a fact pattern to determine which assets are countable, how to calculate a penalty period, and how to determine what the CSRA and MMMNA would be when planning for a married couple.
- 2:20–3:10 **Crisis Planning vs. Proactive Planning-What Will Your Practice Look Like?**  
This session will discuss the difference between planning for a client in crisis, versus planning for a client who does not yet need Medicaid, but may in the future. Attendees will learn how to not only advise clients on with both types of needs, but how to build their practice systems to match their need.
- 3:10–3:30 **Break**
- 3:30–5:10 **Proactive Planning: Adding the Medicaid Asset Protection Trust to Your Practice**  
This session will look at the federal rules authorizing the use of an irrevocable Medicaid Asset Protection trust, how this trust may be designed, and the tax implications of this type of trust.
- 5:10–6:10 **Case Studies and Pricing Strategies – Proactive Planning**  
Attendees will work through sample case studies on how a Medicaid Asset Protection Trust would be utilized. This session will conclude with a discussion of how to price a plan that involves the use of a Medicaid Asset Protection Trust.

## Day Two

- 8:30–9:00 **How to Have the Greatest Week Ever™**  
This session will cover planning tools My Great Week™ and My Great Day™ to help organize the work week to be as focused and powerful as possible and to have the greatest impact in your life and practice.
- 9:00–10:10 **They Hired You-Now What? Medicaid Asset Protection Trust Case Design**  
This session will focus on 10 key decision areas attendees must be aware of when designing and drafting a Medicaid Asset Protection Trust. Choice of Trustees, Trust Protectors and lifetime beneficiaries will be discussed, along with use of grantor trust provisions, distribution of income, use of a limited power of appointment and other critical issues will be covered.
- 10:10–10:30 **Break**
- 10:30–11:00 **Medicaid Asset Protection Trust design (continued)**
- 11:00–12:10 **Crisis Planning Strategies-Process and Pricing**  
During this session attendees will learn “must-know” crisis planning strategies allowed under current federal law, a process to evaluate a crisis planning case, how to determine what is applicable in their own state, and how to price a crisis case.
- 12:10–1:30 **Lunch**
- 1:30–3:10 **Crisis Planning Strategies (continued)**
- 3:10–3:30 **Break**
- 3:30–5:10 **Case Studies**  
During this session attendees will work through case studies involving clients in crisis including pricing strategies.
- 5:10 – 6:10 **The Initial Consultation: How to Get Hired Without Teaching the Client Everything You Know**  
During this session attendees will learn ways to present the idea of Medicaid planning to clients in a way that will persuade clients to hire them for this type of work.

## Day Three

- 8:30–9:20 **Learning What is Allowed in My State**  
Attendees will learn how to find answers within their own state about eligibility rules, planning strategies, and how to submit Medicaid applications in their respective states.
- 9:20–12:10 (Break from 10:00 – 10:30)
- Are You Ready to Transform Your Practice?**  
Are you a Jack of all trades muddling your marketing message? What are the profitability zones in your practice? This session introduces a strategic planning tool called the Practice Model Solution™ to help you analyze your practice model, your practice marketing strategies, your practice management strategies and your uniqueness strategies.

12:10-1:30    **Lunch**

1:30-3:10    **Putting it All Together – An Introduction to the Growth Map™**

Now what, coach? I learned all this great stuff. Do I put it on the shelf? What do I do to implement it? We will introduce you to a tool called the Practice Growth Map that allows you to take every thing you learned and put it into action.

**Following the Live Course:**

ACT™ (Accountability, Coaching, Training) calls:

Call #1: With a given set of facts, attendees will draft a Medicaid Asset Protection Trust and submit it prior to the call. During the call the trust will be discussed and different options as to how it could have been drafted. Attendees will also report on their progress using the “My Great Day™” and “My Great Week™” tools.

Call #2: With a given set of facts, attendees will prepare a written plan for a crisis planning client and submit it prior to the call. The letter will be discussed during the call and different options as to how it could have been drafted. Attendees will also report on progress with new clients and revenue generated.

Call #3: During this call attendees will revisit their answers to “The Practice Model Solution™” and discuss what their next steps are to reaching the practice model desired.