

**YORK COUNTY ESTATE PLANNING COUNCIL**

**Medicaid Planning**

**May 19, 2020**

- I. Introduction to the Medicaid program. What is it? When is it useful? (5 min)
- II. Basic eligibility. Who qualifies for benefits? (10 min)
- III. Pre-crisis Medicaid planning. What can the client do to protect assets in advance? (15 min)
- IV. Crisis Medicaid planning. What can be done for the client who didn't plan? (15 min)
- V. Estate Recovery. How does the client avoid the Estate Recovery claim? (5 minutes)
- VI. Questions. (10 minutes)

<b>PA Medical Assistance - Important Numbers - May 2020</b>	
CSRA Minimum	\$ 25,716
CSRA Maximum	\$ 128,580
Minimum MMNA	\$ 2,114
Maximum MMNA	\$ 3,161
PA Medicaid Penalty Divisor	\$ 10,733
Resource Limit	\$ 2,400 if income > \$2,349 \$ 8,000 if income > \$2,349
Waiver Gross Income Limit	\$ 2,349
Excess Home Equity Limit	\$ 595,000

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