

Medicaid Planning: The Gift & Note Strategy and other Exempt Asset Transfers

Presented by the Elder Law Committee



January 22, 2021
12:00 p.m. – 1:00 p.m.

Live webcast via Zoom – watch live from any convenient location.

1.0 CLE credit: Skills (appropriate for all attorneys)



Moderator:

Kelly Barrett Sarama, Esq., *Center for Elder Law & Justice, Chair, Elder Law Committee*

Speaker:

Frank R. Vavonese, Esq., *Smith Vavonese LLP*

Presentation will cover an in-depth review of Medicaid eligibility and asset preservation planning for skilled nursing home residents. Information will be provided in the form of hypotheticals that apply both exempt transfers and gifting in conjunction with a Deficit Reduction Act compliant promissory note.

For registration, visit our web site:

<https://eriebar.org/events/cle-medicaid-planning-the-gift-note-strategy-and-other-exempt-asset-transfers/>

Online registration is encouraged, or you can fill out the form below and email it to cwalsh@eriebar.org

\$25 BAEC Member

\$30 Non-Member

The course material will be provided via electronic delivery. Please be sure to add your email address below to ensure delivery.

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Accreditation: The Erie Institute of Law has been certified by the New York State Continuing Legal Education Board as an accredited provider of continuing legal education in the state of New York.

Cancellation Policy: If you are unable to attend a seminar for which you have already registered, call the CLE department at 852-8687. For a full refund, notice of your cancellation must be received 48 hours in advance of a program. **Cancellations received less than 48 hours in advance are subject to a \$5 administrative fee.**

Mail or email: Erie Institute of Law, 438 Main Street, Sixth Floor, Buffalo, New York 14202, (716) 852-8687, cwalsh@eriebar.org. We strongly encourage you to register online at www.eriebar.org.

Tuition assistance: Please email mkohlbacher@eriebar.org or cwalsh@eriebar.org to request an application.