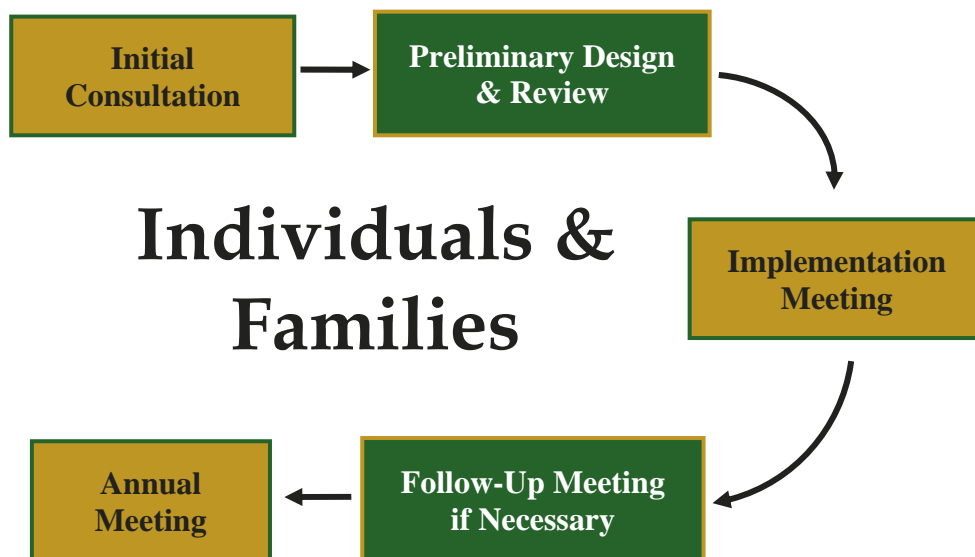


# Elder Law & Medicaid/VA Planning

At Eagle and Fein, we are able to help elders and their families, from beginning to end, through what can be a confusing process to ensure you or your loved one's health needs are met well into the future. By proactively planning, you and your family can prevent having to deplete entire savings on what can be a catastrophic cost for care. You do not have to try to go through the process alone. By getting assistance from us your family can focus on what is important to them while relying on our expertise to ensure the maximum assets are protected while maintaining the best possible care for your loved ones.

Elder Law services include long-term care planning, estate planning, and planning for individuals with disabilities, which may include an adult guardianship or the establishment of special needs trusts. The high cost of care that can be part of the aging process may be alleviated by obtaining public benefits such as Medicare, Medicaid, or the Veterans Aid & Attendance Benefits based on financial eligibility.



# Our Process

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## **Initial Consultation**

The first step is to meet with you and your family. At this meeting we listen and learn about your needs, desires and current situation. We use this meeting to collect and organize your information and complete an initial analysis of your income and resources. Based on what we learn, we can help you and your family develop a strategy to achieve your needs and desires given your unique situation.

## **Preliminary Analysis Review Meeting**

Once we have gathered all needed documents and a further analysis of your income and resources has been completed we meet with you to review our recommended strategies and revise as necessary. Our goal for this meeting is to create a finalized blueprint that accomplishes your goals and objectives.

## **Implementation Meeting**

At the implementation meeting we review all of your planning documents with you, confirm that they meet your goals and objectives and supervise the signing of the documents. Our goal at this meeting is to give you the confidence to leave knowing that your goals and objectives you have for yourself and your family have been accomplished.

## **Follow-Up Meeting (if necessary)**

In some cases there will still be open items or the need to discuss and clarify previously deferred topics after the Implementation Meeting. If there is a need to follow-up with you, we will schedule a follow-up meeting with you and your family to ensure your plan is on the right track.

## **Annual Meeting**

We encourage you to meet with us annually to review your plan and make sure it is still in line with your goals and objectives. We take this time to:

- Catch up on changes in your and your family's health and well being
- Review the scope of your plan and verify it is still appropriate
- Update the legal documents for changes in goals or circumstances, technical changes brought about by court decisions, State or Federal legislations and any attorney improvements.
- Discuss any other matters that may require attention

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## A Message to Children

It is easier to help an aging parent or individual before they are disabled or deemed incapacitated. Taking a proactive approach and contacting Eagle & Fein before a health crisis hits will provide a family time to reflect on the best and most affordable ways to assist with care. If a health crisis does occur whether or not you planned, Eagle & Fein can still help you and your loved ones.