

AAACAP

Area Agency on Aging
of the
Capital Area

Presents a **FREE** informational Webinar on

Estate Planning for Older Adults

Eligibility:



Must be **60 years or older** or a family member caring for an older adult

Platform:



Contact Us for the Link!!!

Pre-Recorded Zoom Webinar

Questions:



Email us at:
bcinfo@capcog.org



Call us at

512-916-6178

* Para información adicional o asistencia, en español, por favor de llamarnos.

Featuring Guest Speaker:

Paul J. Zambie

Managing Attorney
Texas Legal Services Center
Austin, TX

Please contact our office to obtain details on how to participate in a **FREE Legal Clinic**, to obtain assistance with any of the following services:

- Transfer on Death Deed/Medicaid Estate Recovery Program
- Affidavit of Heirship
- Miller Trust/Qualified Income Trust
- Advance Directives
- Durable Power of Attorney
- Medical Power of Attorney

The following collaboration has made this service possible:





Estate Planning for Older Adults Legal Clinic Intake Form



Please print clearly and fill out completely; missing information may delay process. Thank you!

Referral Source				
Date of Referral:	Referred By:	Agency:	Phone:	Email:

Consumer			
Full Name:		Phone:	Date of Birth:
City, Zip Code and County:	Primary Language:	Monthly Income:	Email Address:
Alternate Point of Contact, Full Name:		Phone:	
City, Zip Code and County:	Relationship to Consumer:	Primary Language:	Email Address:

Consent	
Consumer Information Release	
<p>By signing this authorization, you are providing the Area Agency on Aging of the Capital Area (AAACAP) permission to release your information, provided in this intake form, to a participating legal partner. This will allow staff to assist in assessing, arranging, and meeting your service needs, in particular to this legal clinic. Failure to provide this authorization will result in limited service by the AAACAP. This release includes access to a continuum of service/s available through the AAACAP and/or its providers.</p>	
_____	_____
Consumer's Signature	Date
<p>[optional] I authorize the participating legal partner to speak to the following person/s (i.e. spouse, children, caregiver) in regard to my estate planning:</p> <p><input type="checkbox"/> Name/Relationship: _____</p> <p><input type="checkbox"/> Name/Relationship: _____</p>	

★ Please be sure to fill out page 2 of this Intake, which includes a list of services this clinic provides ★

Service/s Requested

★ Select at least one service ★

Transfer on Death Deed:

This document states who should receive a piece of property upon the death of the current owner(s) without the necessity of probate. It also protects property from the **Medicaid Estate Recovery Program**.

When a person applies for Medicaid and long-term services and supports, the state provides a notice that explains **Medicaid Estate Recovery Program**. When the person dies, the state sends a different notice to the estate representative or heirs to let them know that the state intends to file a claim.

Affidavit of Heirship:

-[Informational Only]-

When a decedent—that is, a person who died—leaves behind real property, an affidavit of heirship can be used to transfer the decedent’s interest in real property to their heirs at law. Most of the time, an affidavit of heirship is used when the decedent did not leave a will (that is, died intestate) or *did* leave a will, but the will was not probated (that is, did not go through the proper legal process) within four years of the deceased’s death.

Miller Trust:

Miller Trusts, also called Qualified Income Trusts, provide a way for Medicaid applicants who have income over Medicaid’s limit to become eligible for Medicaid long term care. In short, income over Medicaid’s limit, is put into a trust and therefore not counted as income, thus allowing the applicant to become eligible.

Advance Directives:

This is a general term that refers to the various documents that could include a living will, instruction directive, health care proxy or health care power of attorney.

Durable Power of Attorney:

This form is for designating an agent who is empowered to take certain actions regarding your property. It does not authorize anyone to make medical and other healthcare decisions for you.

Medical Power of Attorney:

A Medical Power of Attorney is a type of “advance directive” that provides a simple way to name someone you trust (an agent) to speak to your health care providers and make health care decisions for you (the principal) when you cannot make decisions for yourself.

Benefits Counseling

Provides one-on-one, no-cost counseling and assistance by trained, certified Benefits Counselors to individuals eligible for the Medicare benefits.

Comments:

Please fax OR email, the intake forms, to the Area Agency on Aging of the Capital Area at:

Fax: 512-916-6042 or Email: bcinfo@capcog.org

For Staff Use Only

Staff: _____

Date Submitted: _____

Submitted to: TLSC TYLA Rio Grande