

SafeCare Program—Suite of Services

For the past ten years of its twenty-three year existence, Senior Medi-Benefits has helped medically needy and financially needy seniors with their long-term care and their retirement-benefit concerns.

Over the years, we have seen tragedies occurring because of “unplanned-for” healthcare emergencies.

So we developed a **NEW** program!

THE SAFECARE PROGRAM —PLANNING AHEAD

The SafeCare Program helps you prepare for a health care, financial, insured future that cushions you in case of long-term care stay—creating a plan that integrates both your Medicare, and Social Security.

As a partner, we help you plan and manage your estate so you can better direct your destination and the destination of your assets. By planning ahead together, we also reduce some of the confusion for your family, associated with a long-term care emergency or your untimely death.

THE SAFECARE PROGRAM —IMMEDIATE NEED

As your partner, in the event of an emergency, Senior Medi-Benefits can help guide family members through a maze of long-term-care issues and bureaucracy. We help our clients get the long-term-care benefits they require, and help them keep these benefits for as long as necessary.

Suite 1—FOR THE LTC MEDI-CAL PREPARATION PLAN WE:

- Collect financial statements, health insurance information and legal documents
- Perform a comprehensive evaluation of current status versus future expectations within the Medi-Cal/Medicaid realm
- Explain asset protection techniques that integrate financial, legal, insurance, tax and long-term care options
- Clarify Medi-Cal recovery issues in regard to future SafeCare of assets

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- Devise a financial time-line and create a written plan to make financial or legal changes, if required for SafeCare purposes
- Assist you in achieving the benchmarks set forth in the plan
- Document and Archive the information in anticipation of future needs
- Provide ongoing case management services, including working with families throughout the time line; integrating changes in your health and financial situations, and providing consultations to you and your family during any of these periods of change and decision-making

Suite 2—FOR LONG TERM CARE MEDI-CAL ELIGIBILITY WE:

1 Determine Initial Eligibility by

- Acting as Authorized Representative with the County; liaison between you and the nursing facility
- Organizing, preparing and submitting the Medi-Cal application to the County
- Following through with County workers until eligibility and benefits are granted
- Following through with County and State eligibility determination for accuracy, including ‘correction’ services to rectify County errors

2 Assure Annual Renewal of Medi-Cal/Medicaid Eligibility by

- Providing two years of Medi-Cal annual renewal services (total of four for married couples)
- Collecting current financial documentation for Medi-Cal redetermination guidelines
- Preparing and submitting the application with documentation to the County and following-up with the eligibility worker until renewal of benefits is granted
- Notifying the family of the status for the initial approval and continuation of benefits

Suite 3 Option—FOR TRUST ADMINISTRATION AND ESTATE SETTLEMENT

As an ‘add-on’ to the SafeCare Case Management Program we provide:

1 Married Couples “First-to-Die” Administration by:

- Setting up and conducting the appointments to discuss the decedent’s estate
- Guiding the surviving spouse and/or family on next steps

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- Lodging the decedent's Will with the County
- Coordinating trust work to transfer title of the Revocable Living Trust into the surviving spouse's name
- Transferring non-trust assets into living spouse's name
- Assisting with distribution of items such as insurance policies

2 Single-Trustee Administration and Estate Settlement by:

- Guiding the successor trustees on necessary steps immediately after a death occurs
- Setting up and conducting the strategy appointments to discuss the estate
- Giving initial notification to beneficiaries
- Lodging the decedent's Will with the County
- Notifying investment and insurance companies of death
- Coordinating the necessary paperwork with successor trustees
- Sending regular updates to beneficiaries
- Sending bookkeeping records and distribution instructions to successor trustees for edits and approval
- Sending bookkeeping records and distribution instructions to beneficiaries for approval
- Guiding successor trustees through distribution and/or settlement of net estate assets.

The SafeCare Estate Settlement plan Suite Three includes:

- Six (6) hours total of estate settlement work for a Single Individual
- Ten (10) hours total of First to Die Administration/ estate settlement work for a married couple

Call 1-888-789-4589 today for a free consultation or email us at SafeCare@SeniorMedi-Benefits.org.

Senior Medi-Benefits is a 501 (c) (3) non-profit organization dedicated to providing accurate and timely information, actionable intelligence, and successful benefits services to the elderly, veteran and disabled populations.