



RESCH, ROOT &
PHILIPPS, LLC
ATTORNEYS AND COUNSELORS AT LAW



Our new Elder Law attorney, Ryan G. Welker, describes how we helped one of our clients preserve her family home, and ensure that she will receive the best care her resources can provide.

Although new to Resch, Root & Philipps, Ryan has been practicing law since 2011. We're excited to have him join our team and assist our clients with additional estate planning strategies to preserve wealth for themselves and their families.

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A widowed, healthy (but aging) mother came to us concerned that if she required long-term care, all of her assets would be lost and she would not be able to leave anything - including the family home - to her children. We met with the client and her family and discussed with them their history, their hopes, and their concerns.

After our discussion of Medicaid rules and the five year look back period, along with relevant planning opportunities, we presented a plan that will ensure that she can live in the home for the rest of her life and that she will receive the best care her resources can provide. This plan also allows her to preserve the family home for herself and her children.

Medicaid can provide significant relief in paying for long-term care. However, without a plan, it is likely that most of our clients' assets would either be exhausted before relief starts or subject to estate recovery after death. Fortunately for this client, the family home will not be subject to either!