

Summary of Contents

Volume 1

PART 1. INTRODUCTION

- Chapter 1. Overview: Demographics of Aging; Introduction to the Practice of Elder Law
- Chapter 2. Establishing an Elder Law Practice
 - Appendix 2-1. Sample Intake Forms
- Chapter 3. Ethical Considerations
 - Appendix 3-1. Table of State Bar Association Ethics Rules, Codes and Opinions
- Chapter 4. Daily Living Problems of the Aging Client: The Older Americans Act, Consumer and Mobility Issues, and Miscellaneous State Benefits
- Chapter 4A. Elder Victimization, Abuse, and Neglect; Adult Protective Services

PART 2. FINANCIAL PLANNING

- Chapter 5. Planning for Income Requirements; Investments
- Chapter 6. Income Tax Planning
- Chapter 7. Planning for Real Property, Including the Residence

PART 3. ESTATE PLANNING

- Chapter 8. Transfer Taxes
- Chapter 9. Planning Lifetime Transfers
- Chapter 10. Wills, Trusts, and Nontestamentary Dispositions
- Chapter 11. Planning for the Person About to Die
- Chapter 12. Postmortem Planning; Estate Administration
- Chapter 13. Disposing of Businesses and Professional Practices
- Chapter 14. Life Insurance Planning

PART 4. SOCIAL SECURITY AND SUPPLEMENTAL SECURITY INCOME

- Chapter 15. Social Security Benefits
- Chapter 16. Supplemental Security Income Eligibility and the Special Needs Trust
- Chapter 17. Veterans' Benefits
- Chapter 18. Application, Payment, Administrative, and Judicial Procedures

Volume 2

PART 5. PENSION AND RETIREMENT BENEFITS

- Chapter 19. Distributions from Qualified Retirement Plans and IRAs
- Chapter 20. Public Pensions

PART 6. HEALTH CARE FACILITIES

- Chapter 21. Institutional Long-Term Care: Nursing Facilities, Assisted Living, and Related Alternatives
- Chapter 22. Care Outside of Institutions: Home Care, Hospices, and Similar Care Alternatives
- Chapter 23. Residents' Rights and Remedies

PART 7. PAYING FOR HEALTH CARE

- Chapter 24. Health and Long-Term Care Insurance
- Chapter 25. Medicare Part A
- Chapter 26. Medicare Part B
 - Appendix 26-1. Centers for Medicare & Medicaid Services Forms
- Chapter 26A. Medicare Advantage (MA) Program
- Chapter 26B. Medicare Part D: The Prescription Drug Benefit
 - Appendix 26B-1. State Health Insurance Information Programs (SHIIP or SHIP) by State
- Chapter 27. Medicare Exclusions
- Chapter 28. Medicare Claims and Administrative Proceedings
 - Appendix 28-1. Centers for Medicare & Medicaid Services Forms

SUMMARY OF CONTENTS

- Chapter 29. Medicaid Program
- Chapter 30. Medicaid Covered Goods and Services
- Chapter 31. Medicaid Claims and Administrative Procedures

Volume 3

PART 8. PLANNING FOR INCAPACITY

- Chapter 32. Mental Capacity
 - Appendix 32-1. Selected State and Territorial Statutes: Testamentary Capacity
 - Appendix 32-2. The Legal Capacity Questionnaire
 - Appendix 32-3. Geriatric Depression Scale (Mood Assessment Scale)
- Chapter 33. Powers of Attorney and Health Care Decision-Making
- Chapter 34. Guardianship and Conservatorship

PART 9. DISCRIMINATION AGAINST THE ELDERLY

- Chapter 35. Employment and Age Discrimination
- Chapter 36. Disability Discrimination and the Elderly Client
- Chapter 37. Grandparents' Issues: Kinship Caregiving, Visitation, and Related Matters

Table of Laws and Rules

Table of Cases

Index