APRIL 2024

Patricia E. Kefalas Dudek & Associates

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- Securely Storing Your Legal Documents



Photo via <u>The Detroit News</u>

HERTEL, SANTANA: BILLS WOULD SOLVE STATE'S HOME HEALTH CARE CRISIS

By The Detroit News

Michigan needs more workers to help care for seniors and those with disabilities. We, as legislators, have an opportunity to provide a solution.

The demand is great: Michigan will have 115,500 home care job openings from 2020 to 2030, and the shortfall coincides with an uptick in the state's older population. By 2030, the retirement age population in our state will grow by more than 30%.

Similarly, the Michigan Department of Health and Human Services (MDHHS), working through its Behavioral and Physical Health and Aging Services Administration (BPHASA), has presented Michigan's State Plan on Aging for fiscal years 2024 to 2026. The plan concludes that "the state's growing older adult population is, in part, driving the need for policies, programs, funding, and advocacy that improve quality of life for those in their later years of adulthood."



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AG NESSEL ANNOUNCES AIRLINE PASSENGER PROTECTION PARTNERSHIP WITH U.S. DEPARTMENT OF TRANSPORTATION

By <u>Michigan Department of Attorney Genera</u>l

LANSING — Michigan Attorney General Dana Nessel announced a new partnership with the U.S. Department of Transportation (DOT) to review and resolve consumer complaints against airlines and ticket agents. The agreement streamlines how the Attorney General and DOT will work together to review consumer complaints and identify violations of federal aviation consumer protection requirements.

The new process for addressing consumer complaints against air travel companies, outlined in a memorandum of understanding (MOU) between the Michigan Department of Attorney General and the DOT, reinforces state and federal commitments to protect the rights of travelers. Michigan is one of 25 states or territories that either signed an MOU with the DOT or expressed an interest in executing such an agreement. This action comes at a time when complaints about flight disruptions, lack of refunds, and lost or delayed baggage continue to be core passenger concerns

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AG NESSEL WARNS MICHIGAN RESIDENTS OF NEW SSA IMPERSONATION SCAM

By Michigan Department of Attorney General

LANSING – Michigan Attorney General Dana Nessel is urging residents to be on high alert for a new impersonation scam after the Social Security Administration (SSA) Office of the Inspector General (OIG) issued an alert (PDF) warning about criminals posing as SSA OIG agents and demanding in-person meetings to hand off cash. SSA OIG agents will never pick up money at your door or in any type of exchange.



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UNDUE HARDSHIP AND THE MEDICAID PENALTY PERIOD

By <u>SShepherd</u>

If you are planning to apply for Medicaid, you might not realize that you should think twice before transferring any of your assets.

If you transfer assets within five years of applying for Medicaid, you could in fact face a penalty period. During this time, you would not be eligible for Medicaid benefits. An exception does exist, however, if enforcing the penalty period could cause you, the applicant, an "undue hardship."

This exception is difficult to prove and rarely granted, but it may be possible in certain circumstances.



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Survey Highlights High Costs of Long-Term Care

By <u>SShepherd</u>

You may not foresee ever needing assistance with your dayto-day life. However, research shows that seven in 10 adults aged 65 and older will require long-term care at some point in their later years. Meanwhile, the U.S. population continues to age rapidly. Americans aged 65 or older are on track to total 82 million in the next 30 years, up from 58 million in 2022.

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Will I Lose My Disability if I Work Part-Time? By Special Needs Answers

According to the Center on Budget and Policy Priorities, 7.4 million people received Social Security Disability Insurance (SSDI) payments in 2023, including 89,000 spouses and 1.1 million children.

SSDI supports workers who develop disabilities before they retire, as well as their spouses and children. The average monthly payment was \$1,489 in 2023, NerdWallet reports.

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Al and Obituaries: Did Al Write This Death Announcement?

By <u>ElderLawAnswers</u>

For many, obituaries play an essential role in mourning. They notify community members of a person's passing and pay tribute to their life.

While the practice of sharing death notices originated in ancient Rome, modern obituaries developed in the 1930s and '40s. Today's format typically has four parts: a death announcement, a short biography, a survivors section, and information about funeral services or a celebration of life.



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Financial Planning: High-Net-Worth Wealth Transfer to Heirs

<u>By ElderLawAnswers</u>

The great wealth transfer is underway in America. Through 2045, Baby Boomers will pass down assets worth roughly \$84 trillion to Gen Z, Millennials, and Gen X. What constitutes a high-net-worth (HNW) inheritance? In the United States, that number averages nearly \$750,000 per inheritor, but can be much higher.

Owners of HNW estates typically monitor and amend their estate plans regularly. They understand that the responsibility of financial stewardship will ensure continued wealth for many generations.

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Securely Storing Your Legal Documents

<u>By ElderLawAnswers</u>

Among your key estate planning documents are your will, living wills, powers of attorney, and medical directives. Securing these somewhere your survivors can easily access them is crucial. Consider storing other information, like birth certificates, marriage licenses, and medical records, in a secure spot as well.

Different Document Storage Solutions

Many people today are striving to become as paperless as possible. They may choose to store their data on memory sticks or an external hard drive. Others use online data storage services that keep this information in the cloud so that they can share files securely with loved ones.

Many still prefer maintaining paper records. Whatever form your documents are in, you can store copies in your home or a safe deposit box.

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Search results for "5 Ways to Update Your Estate Plan After a "Gray" Divorce"

<u>By ElderLawAnswers</u>

Deciding to end a marriage as an older adult is increasingly common. If your marriage ended later in life, you could be part of the "gray" divorce trend.

<u>AARP</u> reports that Baby Boomers, those born between 1946 and 1964, are the generation with the highest divorce rates. Divorce among older adults in the United States has been on the rise since 1990. By 2019, 36 percent of divorces involved people 50 and older.

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Avoiding the Nightmare of Heirs' Property

Sometimes, "heirs' property" refers simply to any property owned primarily by relatives as tenants in common.

Without an estate plan, a will, or any formal probate proceedings at an owner's death, heirs may possess the property. However, without the clear title necessary to prove their ownership status, they might be limited in what they can do.

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Functions Of Powers of Attorney For Healthcare And Financial Decisions

What do you need to know about powers of attorney for healthcare and financial decisions?

When you begin the process of creating an estate plan, one of the most important decisions you'll make is the assignment of powers of attorney for healthcare and financial decisions. This comes in to play if you become unable to make decisions for yourself.



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Choosing the Right Executor for Your Will

Found the Right Executor for Your Will Yet?

Once you've made the important decision to create a will or an estate plan, you must name the right executor for your will. An executor carries out your wishes after your death. I cannot overstate the importance of selecting a trustworthy and capable executor.

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WDET Interview re: CAYMC lawsuit

Michael Bartnik was a guest on 101.9 WDET's "The Metro" on Friday to discuss the ongoing Coleman A. Young Municipal Center lawsuit. A description of the segment:

• Several women with disabilities <u>filed a lawsuit</u> to make some Wayne County, Detroit and state buildings more accessible. A U.S. District Judge recently denied the state's request for government immunity, allowing the case to move forward. Michael Bartnik, an attorney for the plaintiffs, joined the show to discuss the case.

Audio of the show can be found here (Michael's interview begins around 0:38): <u>Detroit's Carr Center seeking support amid financial</u> <u>troubles - WDET 101.9 FM</u>



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<u>Why you should</u> <u>buy long-term</u> <u>care insurance</u> <u>for your parents</u>

By Joshua Rodriguez Edited By Matt Richardson, Angelica Leicht



<u>The Unseen</u> <u>Challenges of</u> <u>Caregiving</u>

By <u>Right at Home</u>



<u>Feds Move to</u> <u>Rein In Prior</u> <u>Authorization,</u> <u>a System That</u> <u>Harms and</u> <u>Frustrates</u> <u>Patients</u>

By Lauren Sausser

