

8 KEYS WORKSHOP OUTLINE

1. Keeping Control/Access to Your Assets
2. Knowing Your Predators
 - a. Nursing Home/Care Costs
 - b. Family Members
 - c. Lawsuits
3. Understanding Medicaid
 - a. Look Back Period & Penalty Period
4. Understanding Wills & Probate
 - a. Disadvantages of Probate
5. Understanding Trusts
 - a. Revocable
 - b. Irrevocable
6. “Plan When You Can”
7. Working With Qualified Professionals
8. Understanding the Real Costs