

MEDICAID Roadmap

JOSEPH
LEGACY PLANNING

Our proven path to guide you
from uncertainty to approval



1. Get Started

Complete our **Medicaid Asset Protection Worksheet** to learn if you prequalify, which assets could be protected, and how. We will provide a checklist for you to guide you in collecting all necessary documentation.



2. Case Review Call

We analyze your situation and share a **custom estimate** on your potential savings, timeline, and any projected penalty periods. Your questions will be answered, and what once felt confusing will become clear and manageable.



3. Save Your Spot

Retain our **in-demand legal team**, so that we can continue working to get you or your loved one qualified for Medicaid.



4. Design Strategy

Based on your information, our team creates a **tailored legal strategy** to help you qualify for Medicaid as efficiently and cost-effectively as possible. This may include an asset spend-down, family trusts, promissory notes, or other legal vehicles.



5. Engage Strategy

Together, we **launch your strategy**. Our team compiles and organizes your documents, guides you through any spend-down steps, deploys legal tools, and provides regular guidance. We work with you to achieve your necessary eligibility requirements.



6. Submit Application

We finalize and **submit your completed application portfolio**, and conduct government interviews on your behalf. By this stage, our team understands your entire situation, has implemented all appropriate legal tools, and has all the information necessary to successfully support and move your case forward with Medicaid.



7. Approval Determination

You receive your Medicaid approval (or other determination), with coverage set to begin after any applicable planned penalty periods. We relay the clear steps and information necessary for you to remain program-compliant for the future.

OUR FOCUS:

Simplify a complex government process and protect your hard-earned assets while securing Medicaid eligibility

SCAN ME



START NOW. SCAN THE CODE
FOR YOUR FREE CASE REVIEW

Call (574) 213-2021
www.MyJLP.com



ASK THE RIGHT QUESTIONS

What is “Long-Term Care Medicaid”?

Long-Term Care Medicaid is the part of Medicaid that helps pay for extended nursing home care and, in some cases, home-based care—when someone meets strict medical and financial eligibility rules.

Who typically needs Medicaid planning?

- Seniors facing nursing home care
- Families trying to protect a spouse at home
- People with assets over the Medicaid limits
- People wanting to plan ahead before a crisis

What does it take to qualify for Medicaid?

Government officials review your income, assets, needs, and financial history. To be eligible, applicants must provide extensive documentation, stay within key resource limits, and follow detailed rules about transfers and spending. This process is complex and highly regulated, and mistakes can lead to delays and denials for those without guidance.

Why should I hire the JLP team?

When it comes to Medicaid crisis planning, we know how to win. With extensive experience and high application success rates, our expert team has saved families tens to hundreds of thousands of dollars in senior care costs.

Let us show you how.

What IS Medicaid?

Medicaid is a joint federal and state government program providing health coverage for those who qualify. It is the primary payer for various long-term care providers, and covers over 60% of all nursing home residents nationwide.

Is Medicaid only for people with no assets?

No. Many middle-class families qualify for Medicaid, but only after careful planning. Medicaid has rules about income, assets, and allowable protections that must be handled correctly.

Can I gift assets to my children to qualify?

Not safely without guidance. Informal transfers made too close to application will trigger serious penalties.

What Is Medicaid Crisis Planning?

The approach used when someone already is in or about to enter a nursing home or longterm care facility, and needs to qualify for Medicaid quickly. It uses compliant legal and financial strategies to preserve assets and achieve eligibility.

Do I need to spend everything to qualify?

No. With proper advance planning and guidance, many assets can be preserved for a spouse or family while still qualifying for Medicaid.

When Does Medicaid Start Paying?

If approved, Medicaid can cover all care costs retroactively up to three months prior to your application, provided eligibility conditions are met.

PREQUALIFY NOW

www.MyJLP.com