

## Comprehensive Estate Planning is Necessary for a Secure Future

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Too often people think that estate planning deals only with where their assets pass at death, and how they might save “death taxes” in the process. Likewise, people often view elder law or long term care planning merely as securing Medical Assistance (Medicaid) Long Term Care (MA-LTC) benefits or asset protection.

Estate planning is much more than designating where assets will pass at death, and elder or long term care planning is, at its essence, estate planning sensitive to the realities of aging that may (but doesn’t always) include the possibility of securing MA-LTC benefits.

A comprehensive estate plan considers a client’s possible needs at every stage of life and is uniquely tailored to each client’s personal circumstances.

Tucker Arensberg, P.C. is a full service law firm with over a century of experience. As Co-Chair of the firm’s Estates and Trust Practice Group, I work with a team of talented attorneys whose breadth of capabilities enables us to counsel and provide comprehensive estate and long term care planning to clients in all walks and at all stages of life.

We have compiled this “Comprehensive Estate Planning Checklist” and a “Key 2019 Estate and Trust, Medicaid and Long Term Care Planning Figures” worksheet to highlight common planning considerations. These are the figures that are relevant to Estate and Trust and Long Term Care planning in Pennsylvania from both a federal and Pennsylvania tax purpose.

Please note these resources are provided for convenience and illustrative purposes only, and should not be relied upon in lieu of sound legal advice based on a thorough review of your personal circumstances. We encourage you to identify which of these issues may be relevant to you and to confirm if they are addressed by your current plan, and we of course welcome you to contact us if not. To learn more about us please contact Nora Gieg Chatha or visit the description of our Estates & Trust Practice Group.