

OREGON MEDICAID PLANNING CHECKLIST

ROSE ELDER LAW, LLC



When planning for retirement, it's essential to plan for future long-term care needs. Medicaid planning is a vital part of safeguarding your financial security for you or your loved ones. Qualifying for Oregon Medicaid can mean the difference between leaving a legacy for your family or spending down all your hard-earned assets on the high cost of long-term care.

The Medicaid process can be complex, but the first step you or a loved one should take is to seek legal guidance from an experienced Medicaid Planning attorney, like the team at Rose Elder Law.

We can help you build a Medicaid plan for your future healthcare needs. This Medicaid Planning Checklist can help you or a loved one navigate some of the necessary qualification steps to ensure your assets are protected while receiving the Medicaid coverage you need.

Do you meet the below criteria for Medicaid benefits? Yes No Unsure

- Are over the age of 64; or
- Are blind or disabled; or
- Have a child, parent, or spouse in your household who is blind or disabled

Do you meet or exceed the annual household income limit (\$2,382 a month before taxes)? Yes No Unsure

Do you have more than \$2,000 in assets? Yes No Unsure

Do you have long-term care insurance? Yes No Unsure

Do you have coverage for nursing home care? Yes No Unsure

Can You afford nursing home care or other medical costs? Yes No Unsure

Do you have a list of assets that you want to be protected? Yes No Unsure

Do you have an irrevocable trust established? Yes No Unsure

Whether you answered YES, NO or UNSURE to any of the about questions, we are here for you!



Your health care needs are one-of-a-kind, and your Medicaid planning should be unique as well. Timing is everything. Don't let your retirement funds, life savings, or home equity become depleted on the cost of care in Oregon.

At Rose Elder Law, we will help you or a loved one address health care needs for seeking Medicaid coverage for long-term care in Oregon. We can ensure your assets are not spent down on the cost of care but protected for your family.

We welcome the opportunity to discuss your
Oregon Medicaid planning needs.

[Schedule your meeting with us today!](#)



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