

CASE STUDY

Nursing Home



Meet Jane

Meet Jane. After being diagnosed with Alzheimer's, Jane enters a care home that costs \$7,500 a month. She always intended to leave an inheritance to her children, but she now fears outliving her savings. In this new set of circumstances, leaving something for her kids would just be a bonus.

How JacksonWhite Can Help



Prepare a strategic gifting strategy under which Jane gifts enough of her available assets to qualify for ALTCS.



Guide Jane through a penalty period, during which time she will pay privately for care.



Facilitate a plan under which Jane pays the facility during her penalty period and eliminates the gap in coverage that arises without planning.



Ensure that Jane rolls seamlessly onto ALTCS when her penalty expires.

*planning for married people works similarly and effectively, as well.

CALL TODAY FOR A FREE PRE-SCREEN

480-613-4653