

Local attorney to lead elder law, estate planning classes

HOLYOKE – Attorney Karen G. Jackson of Jackson Law, an elder law and estate planning attorney, will teach a two-part class highlighting the latest developments in elder law and estate planning at Holyoke Community College in Holyoke.

The four-hour course, called Elder Law and Estate Planning: What You Need to Know, will be presented in Holyoke in two, two-hour sessions, on Mondays, October 18 and October 25, 6 to 8 p.m. Cost is \$99.

“The course will explain the basic

building blocks of an estate plan,” Jackson said. “From that foundation, we will also consider the various specialized trust documents that support this planning. I will clarify the probate court process and what it means to probate a will. And I will explore current MassHealth issues in the event of a nursing home stay.”

The material will be presented as follows:

In the first session, Jackson will explain each document in the core estate plan—the will, power of attorney, health

care proxy, Health Insurance Portability and Accountability Act (HIPPA) release, and advance directive. She will discuss the problems that can occur when proper documents are not prepared before a loss of mental capacity or physical health or before sudden loss of life. In the first session, Jackson will also cover the different types of trusts and the reasons for creating each kind of trust: the revocable trust, irrevocable trust, and special needs trust.

During the second session, Jackson will explain the various tools and tech-

niques to save the home and other assets from the nursing home bill: gifting, the Medicaid qualified annuity, pooled trusts, caregiver child exception, and Medicaid qualified trusts.

For participants who may be able to attend only one session, the full course fee is required.

Holyoke Community College’s main campus in Holyoke is at 303 Homestead Avenue.

To register, call Holyoke Community College at (413) 552-2500 or register online at www.hcc.edu/bce.