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### Crisis Planning Case

Gifting Plus Annuity

Amount of gift: \_\_\_\_\_

\*Gift and Annuity payments may be calculated using the annuity calculator in the EC Medicaid GRAT document group.

Gifting Plus Promissory Note (calculations made in ElderDocx)

Gifting Plus Partial Return

Amount to gift: \_\_\_\_\_

Purchase Income Producing Real Estate

Amount to spend: \_\_\_\_\_

Purchase Annuity for Community Spouse

Amount used to purchase annuity: \_\_\_\_\_

Make Exempt Transfer (any asset) (indicate name of recipient)

Blind child

Disabled Child

Spouse

Make Exempt Transfer to Sole benefit trust (indicate name of recipient)

Blind child

Disabled child

Disabled person under 65

Third party for sole benefit of spouse

Sole benefit trust for spouse

Make Exempt Transfer to a Pooled Trust

Name of pooled trust

Make Exempt Transfer to a Self-Settled Special Needs Trust

Make Exempt transfer of home (indicate name of recipient)

- For blind or disabled child
- Spouse
- Child under 21
- Sibling with equity interest
- Caretaker child

Transfer Home, Retain Life Estate Interest

Purchase Life Estate in Home of Another

Homeowner: \_\_\_\_\_

FMV of home (not life estate interest): \_\_\_\_\_

Lump Sum Personal Service Contract

Amount: \_\_\_\_\_

Care Provider: \_\_\_\_\_

Services: \_\_\_\_\_

Transfer Assets to a Revocable Living Trust

Amount or assets to fund: \_\_\_\_\_

Purchase Prepaid Funeral Services Contract

Amount: \_\_\_\_\_

Create a Burial Savings Account

Amount: \_\_\_\_\_

Purchase an Exempt Automobile

Amount: \_\_\_\_\_

Make Exempt Renovations to the Home

Type and amount: \_\_\_\_\_

Pay Off Existing Mortgage

Amount: \_\_\_\_\_

Pay off existing debt (other than mortgage)

Amount: \_\_\_\_\_

Take out a reverse mortgage

Other: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_