

**HOUGUM LAW FIRM, LLC  
SOCIAL WORKER BOOT CAMP  
OCTOBER, 2024**

**ACTIVITY BOOKLET**



**HOUGUM  
LAW FIRM, LLC**  
ESTATE PLANNING & ELDER LAW

1. Power of Attorney for Health Care is effective at \_\_\_\_\_.
2. A Durable Power of Attorney can either be \_\_\_\_\_ or immediate.
3. List two costs associated with Guardianship:
  - \_\_\_\_\_
  - \_\_\_\_\_
4. Does a Revocable Trust avoid Probate? Yes No (circle one)
5. Is Trust Administration “public record”? Yes No (circle one)
6. Medicare always covers 100 days of rehabilitation.  
True or False (circle one)
7. Medicaid is a program you qualify for when you are 65 or older.  
True or False (circle one)
8. Is Medicaid a federal or state-funded program? \_\_\_\_\_.
9. Definitions:
  - IS \_\_\_\_\_
  - CS \_\_\_\_\_
  - PNA \_\_\_\_\_
10. The Aging and Disability Resource Center must complete a “Functional Screen” when a Medicaid applicant resides in an \_\_\_\_\_ facility.
11. Wisconsin is a Partial / Full care state (circle one)
12. You can transfer your house to your child if that child lived with you for 5 years prior to you moving into a nursing home. True or False (circle one)
13. The current monthly Divestment Penalty Divisor in Wisconsin is \_\_\_\_\_.

14. List two exempt assets:

- \_\_\_\_\_
- \_\_\_\_\_

15. Wisconsin implemented many law changes on August 1, 20\_\_\_\_.

16. Estate Recovery can place a lien on a Life Estate, regardless of when the Life Estate was executed. True or False (circle one)

17. The value of a Life Estate increases / decreases as the Life Estate Holder gets older (circle one)

18. Estate Recovery can “hop ahead” of a decedent’s beneficiaries.  
True or False (circle one)

19. The IRS and Medicaid have the same gifting rules.  
True or False (circle one)

20. When helping a family, be a PEST

- P- Provide documentation
- E- Explain supporting documents
- S- Support position
- T – T\_\_\_\_\_ the Consortium, if they’re unclear

21. What are the asset protection options for someone entering long-term care? “Typical law firm answer, it \_\_\_\_\_!”

22. Who do you call when your families have questions about Medicaid and paying for long-term care?

- Ghostbusters!
- Social Security Administration
- Hougum Law Firm, LLC