Highlights of the 2019-2 Supplement

We are here to help. The following are some of the changes we have seen—and written about—affecting your practice:

• Updated appendices about Medicaid Planning. (See Appendices 17:1–17:8.)

• Updates to questions about the new Veterans Administration benefit asset limits and transfer rules. (See Qs 20:13–20:16.)

• Updates to questions on paying privately for long-term care. (See Qs 14:1–14:17.)

• Who typically prepares estate, inheritance, and gift tax returns? (See Q 5:11.)

• When and where must the federal estate tax return be filed? (See Q 5:55.)

• Updates to questions on home care including tax laws and Department of Labor regulations related to hiring home health workers. (See Qs 13:17–13:18.)

• Revision of questions related to Continuing Care Retirement Communities. (See Qs 13:26–13:30.)

• Updates to benefits provided in Medigap policies. (See Q 16:3.)

• What happens if a Supplemental Security Income recipient is overpaid? (See Q 19:36.)

• Which states now impose some kind of estate or inheritance tax and/or gift tax? (See Q 5:58.)

• Updated Social Security, Medicaid, tax, and other numbers throughout the supplement.