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Ronald Fatoullah & Associates Host Educational Seminar At The Boulevard Assisted Living

By Yaakov Serle

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Many of our readers look forward to the articles published in the *Queens Jewish Link* written by the elder law attorneys at Ronald Fatoullah & Associates. Various elder care topics have been discussed, including information on trusts and estates, the importance of preparing advance directives, planning for long-term care, and applying for Medicaid.

I was recently invited to a complimentary educational seminar and luncheon at The Boulevard Assisted Living Community located in Flushing, hosted by Ronald Fatoullah & Associates. A delicious kosher lunch was followed with presentations by Ronald Fatoullah, Esq., founder of Ronald Fatoullah & Associates; Elizabeth Forspan, Esq., managing attorney for the firm; Perry Shulman, CPA; and Bruce Neufeld, Administrator of The Boulevard.



Mr. Fatoullah began by discussing the importance of being prepared for unexpected long-term care and the importance of several crucial planning documents including Power of Attorney, Health Care Proxy, Living Will, and Last Will and Testament. He also discussed the guidelines and process involved for applying for both nursing home and community home care Medicaid in New York. In addition, Mr. Fatoullah explained that he is a partner with Advice Period, a company that provides wealth and financial consulting, and his extensive financial expertise and knowledge benefits their clients in asset planning and protection.

Elizabeth Forspan, Esq. is the firm's managing attorney who frequently co-authors articles published in *QJL*. Elizabeth has strong ties to the Queens Jewish community, having attended Queens College and having in-laws who reside in the community. Ms. Forspan continued the discussion regarding important planning for possible long-term-care needs. She explained how tax planning and gifting is related to Medicaid-funded long-term care, and discussed estate tax planning techniques, gifting strategies, and the utilization of

asset preservation trusts. Ms. Forspan explained the differences between revocable and irrevocable trusts and how an "irrevocable" trust can legally be reversed.

Mr. Shulman discussed the importance of fiduciaries and family members having access to important personal and financial information in the event of unexpected incapacity or medical issues. Mr. Shulman distributed a tool called the "Personal Document Locator." This booklet provides your attorney, fiduciary, and loved ones with online account usernames/passwords, account numbers, and location of all financial holdings, and contact information for legal representation, insurance policies, and physicians. The booklet also provides written documentation as to whom you have appointed as agents to act on your behalf with regard to your advance directives.

Finally, Bruce Neufeld spoke about his vision and commitment to the residents at Boulevard Assisted Living in Queens. I learned that the Boulevard is a special assisted living facility called an ALP, as it is a facility that accepts Community Medicaid toward the cost of care for the residents (as per the New York State Office for the Aging's Assisted Living Program). The facility also has a Home Care Department and can assist individuals living in the community with home care services as well. The Boulevard Assisted Living Community recently opened a new location in Brooklyn.

I learned that Ronald Fatoullah & Associates has been helping many senior citizens and their families with the legal and financial challenges of aging and asset protection for over 30 years. The firm also focuses on Medicaid eligibility, nursing home matters, estate tax planning, estate litigation, probate, guardianships, and special needs planning. I look forward to attending their next event in the area. Please enjoy the attached photographs of the event.

By Yaakov Serle