



# Sandoval's Soliloquy

## A Periodic Update for Health Care Professionals Working With the Elderly and the Disabled

March 2008

**Dennis M. Sandoval,**  
A PROFESSIONAL LAW  
CORPORATION

*Providing Peace of Mind to  
Seniors, the Disabled and  
their Family Members*

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*Mr. Sandoval is the only  
attorney in California  
certified as a Taxation Law  
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California Bar Board of  
Legal Specialization as well  
as a Certified Elder Law  
Attorney by the National  
Elder Law Foundation*

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### Department of Health Services Announces 2008 Average Private Pay Rate

The Department of Health Services has announced the Average Private Pay Rate (APPR) for 2008. The APPR is the number used in calculating the penalty associated with the transfer of non-exempt assets for purposes of qualifying for Long Term Care Medi-Cal. The 2008 APPR is \$5,496.00. The DHS had previously announced that the Community Spouse Resource Allowance (CSRA) has been increased to \$104,400.00 for 2008 and the Monthly Minimum Maintenance Needs Allowance (MMMNA) was increased to \$2,610.00 for 2008.

### State Senator Introduces Bill To Outlaw Non-Lawyer Medi-Cal Planners!

On January 31, 2008, State Senator Alquist introduced SB 1136, which would add Welfare and Institutions Code § 10003, which would provide that any non-attorney who charges a fee to represent or aid an applicant in the procurement of public social services shall be guilty of a misdemeanor. This would include services to assist a person in qualifying for Long Term Care Medi-Cal. The purpose of this bill is likely to discourage the misinformation that is being disseminated by many persons, including many annuity and insurance salesmen. However, this bill may go too far, as it would eliminate the services provided by many former eligibility workers as well as force many non-profits and public service organizations to stop providing these types of services.

### Update

SB 1136 has been withdrawn from consideration at this time. It is unknown whether it will be brought back for consideration later this year or in future years. Persons opposed to the proposed bill can contact Senator Alquist's office at her Sacramento phone number, 916-651-4013, her office in the San Jose area at 408-286-8318, or by email at [senator.alquist@sen.ca.gov](mailto:senator.alquist@sen.ca.gov).

Mr. Sandoval is pleased to announce that the California Education of the Bar (CEB) has just published its two-volume treatise, **Special Needs Trusts: Planning, Drafting and Administration**. Dennis is the author of the *Taxation of Special Needs Trusts* chapter of the two-volume treatise. Many of the leading California estate planning practitioners with special knowledge of planning for Special Needs individuals, including Mr. Sandoval, collaborated in this seminal work in this area of very specialized estate planning that involves knowledge of many areas of federal law as well as California law..



**Dennis M. Sandoval** has recently presented Estate Planning for Special Needs Persons classes to **The Down Syndrome Association of Orange County, The Inland Empire Autism Society Support Group, H.E.A.R.T.S. Autism Support Group** and **The Riverside Adults with Epilepsy Support Group**. If you know of a support group that would like Dennis to give a presentation on estate planning for special needs persons, give Karen Griffith, our Geriatric Care Coordinator, a call at (951)787-7711.

### **Hear Dennis on the Radio**

Dennis can be heard every Saturday, on his new radio show, **Senior Talk with Dennis Sandoval**. The show will highlight information of importance to seniors, including (1) planning for long term care, (2) paying for in-home caregivers; assisted living or skilled nursing facilities, (3) planning for lifetime incapacity, (4) retirement estate planning, (5) protecting assets for surviving spouses and children, (6) avoiding court proceedings such as conservatorships and probate, and (7) passing financial and non-financial wealth on to future generations in an intelligent manner. **Senior Talk with Dennis Sandoval** airs on KTIE, AM 590, the Talk of the Inland Empire, every Saturday at 2:30 p.m..



# ***Save The Date!!***

**Friday, April 18, 2008**

## ***Third Annual Inland Empire Caregivers Symposium***

***See the registration form that accompanies the e-Newsletter for more information about this year's speakers, topics they will cover and how to register to attend.***

***We think this will be our best Symposium yet, and we hope you can attend!***

## Program:

- 8:00      **Registration**
- 8:30      **Opening Remarks**
- 8:45      **Codes of Ethics: Who, What, Where, When and Why?**  
Speaker: Dr. Connie Milton
- 9:45      **Morning Break**
- 10:00     **Snoring, Dreaming, Screaming, and Kicking**  
Speaker: Dr. Stuart Menn, M.D.
- 11:00     **Lunch**  
*Sponsored by Planning Services, Inc. – Paul Smith, CEA*
- Noon      **Pharmacology and the Elder: Beware and Be Aware!**  
Speaker: Susan Drummond, RN
- 1:00      **Planning for “The Forgetting”: Getting an Alzheimer’s Patient’s Estate and Finances in Order**  
Speaker: Dennis Sandoval, J.D.
- 2:00      **Elder Abuse: What Must Be Done**  
Speaker: Dorothy Miller
- 2:45      **Afternoon Break**
- 3:00      **Understanding Mental Health Issues With Seniors**  
Speaker: David Sharp, R.N., Ph.D.
- 4:00      **Aid and Attendance: What Is It and Who Can Get It?**  
Speaker: Jeanette Phillips
- 4:45      **Closing Remarks**

## Faculty

**Susan Drummond, R.N.**

Associate Professor, California Baptist University

**Stuart Menn, M.D.**

Investigator, Pacific Sleep Medicine Services

**Dorothy Miller**

Coordinator, DPSS, Adult Protective Services

**Connie Milton, R.N., Ph.D.**

Dean, School of Nursing, California Baptist University

**Jeanette Phillips**

Service Representative, Veterans Services

**Dennis M. Sandoval, J.D., LL.M., CELA, AEP**

Certified Elder Law Attorney

**David Sharp, RN., Ph.D.**

Associate Dean, School of Nursing, California Baptist University

## 2008 Consumer Seminars

Call 951-787-7711 to make reservations – Seating is limited!!!!

Topic	Date	Location
Legacy Wealth Planning: Why Your Existing Estate Plan † Won't Work	March 5, 2008 7 – 9 p.m.	Our Classroom*
Legacy Wealth Planning: Why Your Existing Estate Plan † Won't Work	March 8, 2008 9 – 11 a.m.	Our Classroom*
Legacy Wealth Planning for Persons With Large Retirement Assets (More Than \$250,000): Why Your Existing Estate Plan † Won't Work	March 15, 2008 9 – 11 a.m.	Our Classroom*
Legacy Wealth Planning: Why Your Existing Estate Plan † Won't Work	April 9, 2008 7 – 9 p.m.	Our Classroom*
Legacy Wealth Planning: Why Your Existing Estate Plan † Won't Work	April 12, 2008 9 – 11 a.m.	Our Classroom*
Legacy Wealth Planning: Why Your Existing Estate Plan † Won't Work	May 7, 2008 7 – 9 p.m.	Our Classroom*
Legacy Wealth Planning: Why Your Existing Estate Plan † Won't Work	May 10, 2008 9 – 11 a.m.	Our Classroom*
Legacy Wealth Planning: Why Your Existing Estate Plan † Won't Work	June 11, 2008 7 – 9 p.m.	Our Classroom*
Legacy Wealth Planning: Why Your Existing Estate Plan † Won't Work	June 14, 2008 9 – 11 a.m.	Our Classroom*
<b>Special Session</b> – Legacy Wealth Planning for Same Sex and Unmarried Partners: Why Your Existing Estate Plan † Won't Work	June 21, 2008 9 – 11 a.m.	Our Classroom*
Legacy Wealth Planning: Why Your Existing Estate Plan † Won't Work	July 16, 2008 7 – 9 p.m.	Our Classroom*
Legacy Wealth Planning: Why Your Existing Estate Plan † Won't Work	June 19, 2008 9 – 11 a.m.	Our Classroom*

*\* Unless attendance requires a larger classroom or is scheduled elsewhere, all classes will be conducted in our law firm classroom, located at 3233 Arlington Avenue Ste. 105 Riverside, California 92506 (corner of Division Street and Arlington (near Target Store and across the street from California School for the Deaf)) -- (Maximum attendance in the law firm classroom is twelve persons)*

† The reference to an existing estate plan is a reference to existing estate plan drafted by a law firm other than Dennis M. Sandoval, A Professional Law Corporation

Interested in having Dennis Sandoval or Pamela Valencia conduct a seminar for your church, employee group or other organization? We would be glad to accommodate most requests. Call 951-787-7711 now to inquire about availability of a speaker.