

Elder Law Debrief Agenda

February 2025

Elder Law Cases

- ✓ Video phone recording insufficient to be considered a will –
Matter of Estate of Beck, Supreme Court of Montana, 557 P.3d 1255
<https://casetext.com/case/in-re-beck-422025>
- ✓ Promissory note signature a genuine issue of dispute –
Scott v. Scott, Supreme Court of Alabama, SC-2024-0246
<https://law.justia.com/cases/alabama/supreme-court/2025/sc-2024-0246.html>
- ✓ Attorney fee for Medicaid services a lower priority in estate recovery than state's claim for services rendered –
In re Nothnagel Estate, State of Michigan Court of Appeals, Unpublished No. 367551
<https://law.justia.com/cases/michigan/court-of-appeals-unpublished/2024/367551.html>
- ✓ IRA not considered part of surviving spouse's probate claim against husband's estate –
Reich v. Reich, Court of Appeal of California Second Appellate District B332714
<https://law.justia.com/cases/california/court-of-appeal/2024/b332714.html>

Elder Law News

- ✓ New 2025 Medicaid and Social Security Figures
access.krausefinancial.com
- ✓ Michigan will raise its Individual Resource Allowance Feb. 1, 2025 to \$9,660 from \$2,000.
<https://mdhhs-pres-prod.michigan.gov/olmweb/exf/BP/Public/BEM/400.pdf>
- ✓ President Trump nominated Dr. Mehmet Oz as the Centers for Medicare and Medicaid Services (CMS) Administrator.
<https://www.congress.gov/nomination/119th-congress/12/34>



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