Notes from Meeting with Ron Kearns – Probate Attorney

October 29, 2020

Can't Use Own SSN, you get a tax ID number - get from the Court

Pay the last bills

Link to the tax ID form -

Notice to division of Medicaid

55 or older that received mass health if they die and their estate goes through Mass Probate

#6 - is now Mass Health

Mass health sends a notice to the court, to put a lien,

Mass health allows the first 10K to go to the family. Have to request it. Nice to know.

If you are 55 or older whatever you received in Medical benefits they take back.

We always try to avoid probate to avoid the Medicaid lien.

Mass health program called common health - young and disabled, assets don't matter

Mass health standard probate recovery lien

Best way to avoid probate to have someone as a joint owner, adult children. Transfer on death, ToD/PoD - make them a beneficiary

Life estate / revocable

trust / irrevocable trust

Have to list all heirs (blood relative)

And divisee (named in the will)

Bank accounts and financial

Life insurance beneficiary - doesn't have to go on the form, not through probate. Unless my Spouse is deceased, then it will be paid to the estate.

Need a death certificate with a seal - NOT a COPY

If you have 2 motor vehicles you have to put the second one

Can check both boxes Heir and devisee

One named a voluntary PR you get a check to the estate

Creditors have one year to file for claims - if debt we would want to hold.