

Supreme Court Case



SAFE Planning Wins Supreme Court Case to Protect Client Assets.

To qualify their clients for Medicaid eligibility, and based on the interpretation of state and federal Medicaid policy, S.A.F.E. Planning challenged Medicaid restrictions in the Louisiana Court and won!

The Louisiana Second Circuit Court of Appeals recently upheld a lower court ruling in the case of Renate King vs. the Secretary, Louisiana Dept. of Health and Hospitals, verifying SAFE Planning's contention that the State was wrong to deny Medicaid eligibility to SAFE Planning's client.

SAFE Planning brought the case on behalf of King, whose spouse purchased an annuity after she went into a nursing home. In order to qualify for Medicaid, the State claimed it should be named as beneficiary of the annuity.

“You Can't Fight City Hall”... Who Said So?

Standing by its commitment to their client and their belief in right and wrong, S.A.F.E. Planning used their own money to fight all the way to the Supreme Court - and won. The United States Supreme Court upheld the lower court decision that Louisiana's Department of Health and Hospitals was in violation of federal guidelines regarding Medicaid approval, stating that Louisiana's attempt to require a person to name the state as a beneficiary to an annuity is a more restrictive standard than federal law allows and could not be used to deny King's benefits.

