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Questions You Must Ask

To Ensure You Are
Receiving Premium
Service & Benefits


What percentage of total assets will be saved after paying the planning fee?

If the answer is
less than 100%
or there is no
guarantee...

keep looking.

There are better
providers with more
assured outcomes.

01



How many cases have you
been directly involved with
over the past 10 years?

If the answer is
not in the thousands
you should keep looking.

Medicaid crisis planning is
likely a side hustle and
therefore there's likely a
lack of expertise.

02

If I hire you today, how long will it be before you have my assets restructured and my application filed in a manner that you're sure will result in approval for the month requested?

If the answer is
longer than two weeks,
you are hiring a service that
is not obtaining maximum
benefits for you.

The service you hire should be a streamlined machine that gets results quickly. The longer it takes to correctly file, the more assets and income you lose.




Who is responsible for obtaining proof of assets, income, gifting, etc?

If the answer places
all the responsibility on you,
keep looking.

There are many circumstances that will require the professional's involvement. The answer should be "you provide what you can, we will get the rest".



04



What are your most-used strategies?

If the answer is
**Personal Services
Contracts and/or EPIC
Real Estate Program,**
run!

Both strategies violate one or more of the rules of what Platinum considers to be quality Medicaid crisis planning; keep assets liquid, maintain control of the assets, and pay no income tax.

05

In the unlikely event that a fair-hearing is needed to maximize benefits, is the hearing representation included in the fee?

What about a District Court of Appeal (DCA) appeal?

If the answer is
no
keep looking.

This professional is
unsure of his/her
skills, unfair in the fee
schedule, or both.



Do you file for
UMED benefits?

If they don't know
what you are talking
about or the answer is

no

keep looking.

UMED is a very valuable benefit
when the applicant is eligible.
Even if your applicant doesn't
need it, the professional not
knowing what it is or not being
willing to file for it should be a
huge red flag.



If you are filing for home health care or assisted living care, does the professional provide interview coaching and oversight of the ADRC, CARES, and DCF until your applicant is selected and approved?


If the answer is

**no
run!**

There are so many things that can go wrong with this process, it's too risky not to have an advocate working on your behalf every step of the way.

08






Does the professional
provide free travelling
notary services?

If not

perhaps they are
not fully committed
to the client.





Does the professional provide
free educational videos on
various Medicaid crisis
planning topics that you can
access at your convenience?

**If not
be careful**

the staff may not have the
time to personally spend
explaining these concepts.

What is the return
call policy?

If there is
none or it's
greater than
24 hours,
keep looking.



Are attorneys the only professionals that can do Medicaid planning?

If the answer is
yes

**you have a
dishonest attorney.**

While some matters can only be handled by attorneys, most of the Medicaid planning process can be handled by specialized services whose sole focus is applying for Medicaid benefits. In fact, any non-attorney can assist in the Medicaid application and renewal process according to 42 CFR 435.908(b).



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Do you handle the annual reviews and changes to the case throughout the years?

If the answer is

no

take that into consideration.

There are many circumstances that can arise where professional assistance may be needed.



13

Do you provide weekly reporting to keep me updated on the progress of the case?

If the answer is

no

how will you know what the status of your case is?



14

How many 5-star Google reviews do you have related to Medicaid crisis planning?

If the answer is
not in the hundreds
then you are in
the wrong place.

Keep in mind that some attorneys have hundreds of reviews but only a handful relate to Medicaid. Be sure the positive reviews are numerous and directly related to Medicaid crisis planning.



Meet the Team Protecting Your Family's Care and Finances



Since 1996, Platinum Benefit Services, Inc. has helped over 16,000 families secure long-term care benefits while protecting their assets. Whether for home health, assisted living, or nursing home care, their trusted team ensures your loved ones receive quality care without financial compromise.

Platinum specializes in simplifying Medicaid, Veterans Aid, and Social Security Disability applications, even in complex financial situations. Partnering with top Elder Law Attorneys, they help families avoid costly mistakes, maximize benefits, and safeguard what matters most.

With an estimated \$2 billion in assets protected and hundreds of five-star reviews, Platinum is recognized for delivering results and peace of mind during life's most challenging times. Families repeatedly share, "We would have made so many costly mistakes without your help."

Platinum Benefit Services is more than expert guidance—they're your advocate for financial security and compassionate care solutions.

Let Platinum Benefit Services guide your family to secure the care your loved ones deserve while safeguarding what matters most.

If you're unsure of what to do, who to trust, or you are afraid of being taken advantage of by well meaning, but under qualified Medicaid planners (attorneys and non-attorneys), then...

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