

Boot Camp Case Study Facts

Summary

	HUSBAND	WIFE
Checking	\$ 5,000.00	\$ 5,000.00
Certificates of Deposit	\$ 10,000.00	\$ 372,640.00
House	\$ 90,000.00	
IRA	\$ 50,000.00	\$ 100,000.00
Motor Vehicle	\$ 10,000.00	\$ 15,000.00
TOTAL each spouse	\$ 165,000.00	\$ 492,640.00
Total Marital Assets	\$ 657,640.00	
Total Spend-down	?	
Number Months Private Pay	?	
Amount at risk to estate recovery	?	

Jane's monthly budget needs addressed?

Prenuptial agreement honored?

Husband have capacity?

Status of 1984 will?

Estate planning documents needed?

Protect Jane's assets in the future?

Veteren's benefits?

What happens if John is in end-stage medical condition?