

2001 DRAFTING REQUEST

Bill

Received: 10/02/2000

Received By: isagerro

Wanted: As time permits

Identical to LRB:

For: Administration-Budget

By/Representing: Mullikin

This file may be shown to any legislator: NO

Drafter: isagerro

May Contact:

Alt. Drafters:

Subject: Public Assistance - med. assist.

Extra Copies: DAK

Pre Topic:

DOA:.....Mullikin -

Topic:

Increase excludable assets in irrevocable burial trust for MA program

Instructions:

See Attached

Drafting History:

<u>Vers.</u>	<u>Drafted</u>	<u>Reviewed</u>	<u>Typed</u>	<u>Proofed</u>	<u>Submitted</u>	<u>Jacketed</u>	<u>Required</u>
/1	isagerro 10/16/2000	jdyer 10/17/2000	rschluet 10/17/2000	_____	gretskl 10/17/2000		State
/2	isagerro 01/06/2001	chanaman 01/06/2001	martykr 01/06/2001	_____	lrb_docadmin 01/07/2001		State

FE Sent For:

<END>

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FE Sent For:

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1/6/01
12

12/6

16
1/6
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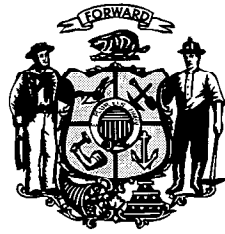
<u>Vers.</u>	<u>Drafted</u>	<u>Reviewed</u>	<u>Typed</u>	<u>Proofed</u>	<u>Submitted</u>	<u>Jacketed</u>	<u>Required</u>
1/1	isagerro	10/17 jld	10-17-00	10-17-00			

FE Sent For:

<END>

01-0608

STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION
101 East Wilson Street, Madison, Wisconsin



Office of the Secretary
Post Office Box 7864
Madison, WI 53707-7864
Voice (608) 266-1741
Fax (608) 267-3842
TTY (608) 267-9629

TOMMY G. THOMPSON
GOVERNOR

GEORGE LIGHTBOURN
SECRETARY

Date: September 29, 2000
To: Steve Miller
Legislative Reference Bureau
From: Melissa Mullikin *mm*
State Budget Office
Subject: Statutory Language Budget Draft for DHFS

In order to qualify for the Medical Assistance program in Wisconsin, an applicant must meet certain income and asset limits. Irrevocable burial trusts are one type of asset that may be excluded from eligibility determination. The current limit for an irrevocable burial trust is \$2,000. The limit will increase to \$2,500 on January 1, 2001, under a provision included in the 1999 Wisconsin Act 9.

Please prepare a statutory language draft that would increase the amount of excludable assets in an irrevocable burial trust to \$4,000 effective January 1, 2003.

Thank you for your attention to this request. I can be reached at 267-7980.



LPS-check
auto refs

jd

DOA:.....Mullikin – Increase excludable assets in irrevocable burial trust for MA program

FOR 2001-03 BUDGET — NOT READY FOR INTRODUCTION

SOON

don't gen

1 AN ACT ...; relating to: the budget.

Analysis by the Legislative Reference Bureau

HEALTH AND HUMAN SERVICES

✓**MEDICAL ASSISTANCE**

Under current law, to qualify for the medical assistance (MA) program, an applicant must meet certain income and asset limits. Currently, DHFS must exclude certain assets when determining whether an applicant meets the asset limits. One of the assets that must be excluded is an irrevocable burial trust. The current limit on an irrevocable burial trust is \$2,500 up to \$2,500 in. ✓

This bill increases the limit on an irrevocable burial trust to \$4,000 on January 1, 2003. ✓

For further information see the *state* fiscal estimate, which will be printed as an appendix to this bill.

The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:

2 SECTION 1. 445.125 (1) (a) 2. ✓ of the statutes is amended to read:

1 445.125 (1) (a) 2. Notwithstanding s. 701.12 (1), such agreements may be made
2 irrevocable as to the first \$2,500 [✓] \$4,000 of the funds paid under the agreement by
3 each depositor.

History: 1973 c. 227; 1977 c. 40; 1979 c. 175 s. 29; 1979 c. 221 s. 662; Stats. 1979 s. 445.125; 1981 c. 64; 1983 a. 448, 485, 538; 1985 a. 29; 1989 a. 307; 1991 a. 39, 221; 1995 a. 295; 1999 a. 9.

4 **SECTION 9343. Initial applicability; regulation and licensing.**

5 (1) IRREVOCABLE BURIAL TRUSTS. The treatment of section 445.125 (1) (a) 2. [✓] of
6 the statutes first applies to ^{burial trust agreements} ~~medical assistance eligibility determinations made on~~ ^{entered} into
7 the effective date of this subsection. [✓]

8 **SECTION 9443. Effective dates; regulation and licensing.**

9 (1) IRREVOCABLE BURIAL TRUSTS. The treatment of section 445.125 (1) (a) 2. of
10 the statutes and [✓] SECTION 9343 (1) of this act [✓] take effect on January 1, 2003.

11 [↑]
a.r. (END)

Sager-Rosenthal, Ivy

From: Mullikin, Melissa
Sent: Friday, January 05, 2001 4:49 PM
To: Sager-Rosenthal, Ivy
Subject: FW: LRB Draft: 01-0608/1 Increase excludable assets in irrevocable burial trust for MA program

Ivy,

We have one change related to this short draft on irrevocable burial trusts. Instead of increasing the limit to \$4,000, we'd like to increase it to \$3,300.

Thanks much,
Melissa

Melissa Mullikin
Executive Policy and Budget Analyst
State Budget Office
267-7980

-----Original Message-----

From: Schlueter, Ron
Sent: Tuesday, October 17, 2000 11:17 AM
To: Mullikin, Melissa
Cc: Kraus, Jennifer; Currier, Dawn; Hanaman, Cathlene; Haugen, Caroline
Subject: LRB Draft: 01-0608/1 Increase excludable assets in irrevocable burial trust for MA program

Following is the PDF version of draft 01-0608/1.



01-0608/1



9cm/11

RMR

DOA:.....Mullikin - Increase excludable assets in irrevocable burial trust for MA program

FOR 2001-03 BUDGET — NOT READY FOR INTRODUCTION

2001

done for cat

1 AN ACT ...; relating to: the budget.

Analysis by the Legislative Reference Bureau

HEALTH AND HUMAN SERVICES

MEDICAL ASSISTANCE

Under current law, to qualify for the medical assistance (MA) program, an applicant must meet certain income and asset limits. Currently, DHFS must exclude certain assets when determining whether an applicant meets the asset limit. One of the assets that must be excluded is up to \$2,500 in an irrevocable burial trust.

* This bill increases the limit on an irrevocable burial trust to ~~\$4,000~~ on January 1, 2003. ^{\$3,300}

For further information see the *state* fiscal estimate, which will be printed as an appendix to this bill.

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3 each depositor. \$3,300

4 **SECTION 9343. Initial applicability; regulation and licensing.**

5 (1) IRREVOCABLE BURIAL TRUSTS. The treatment of section 445.125 (1) (a) 2. of
6 the statutes first applies to burial trust agreements entered into on the effective date
7 of this subsection.

8 **SECTION 9443. Effective dates; regulation and licensing.**

9 (1) IRREVOCABLE BURIAL TRUSTS. The treatment of section 445.125 (1) (a) 2. of
10 the statutes and SECTION 9343 (1) of this act take effect on January 1, 2003.

11 (END)



State of Wisconsin
2001 - 2002 LEGISLATURE

LRB-0608/2
ISR:jld&cmh:km

DOA:.....Mullikin – Increase excludable assets in irrevocable burial trust for
MA program

FOR 2001-03 BUDGET — NOT READY FOR INTRODUCTION

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This bill increases the limit on an irrevocable burial trust to \$3,300 on January 1, 2003.

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