

**Here is Ludeman Center Director Tim Montgomery's update from our
March 16, 2022 Guardian call.**

He writes:

1. What are the steps to open up an ABLE account? Call 1-888-609-8683 and speak to a representative.
2. Does Ludeman assist in setting up Burial accounts? If they are setting up an account through Ludeman Yes . If they are setting up the account outside of Ludeman the answer is No.
3. What is the information/procedure needed for getting extensions for the Stimulus Money spend down? Call Shelia McCrary at 708-283-3097 and she will grant the extension. Please have the guardian combine the amounts, and the spenddown will be extended to August 31, 2022. If HFS starts reviewing the accounts, the spenddown date will change.

Timothy J. Montgomery, SPSA

Interim Center Director

Ludeman Center 114 N. Orchard Drive Park Forest, IL 60466

☎ (708) 283-3004 📠: (708) 283 -3316

✉ timothy.montgomery@illinois.gov

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In addition to Tim Montgomery's response PFLC recommends that you:

On question #1, you might also want to check out the website AbleNow.com for additional information. Consult your lawyer should you need additional advice in setting up such an account.

On question #2 you can get additional information from Sheila McCrary at 708-283-3097.

In general, if you would like to set up a burial account through Ludeman you can set aside (spend down) up to \$1,500. You would need to submit a letter stating that you want to set aside \$1,500 for burial. At the time of death you will be able to access those dollars or submit receipts earlier if you choose to prearrange funeral arrangements at some point. It gives you the option of not having to make all these arrangements in the next two weeks.

Mail the letter to:

Ludeman Center
114 N. Orchard Drive
Building 61
Park Forest, IL 60466

Atten: Sheila McCrary
Resource Dept.

On question #3, The HFS Tim Montgomery refers to stands for the Illinois Department of Healthcare and Family Services which is responsible for providing for adults and children who qualify for Medicaid. HFS is responsible for oversight of our residents' Medicaid dollars.

It should be noted that the August 31, 2022 deadline cited is not a hard deadline. If HFS does start reviewing accounts at Ludeman as Tim Montgomery stated they could, then the spenddown date could be moved up earlier. So it is still best to complete your spend down as soon possible. The good news is that you do have some extra time.