



Providing Personalized & Compassionate Support

At Oriol Financial Services, we know that navigating the Medicaid (MassHealth) application process can be overwhelming and stressful. That's why our dedicated Medicaid liaisons are here to provide compassionate and personalized support to you and your family every step of the way. We take the time to understand your unique situation, offering tailored advice and clear communication to help you make informed decisions. Whether you're a facility without a dedicated Medicaid liaison or an individual seeking guidance, our team is committed to making this complex process as smooth and manageable as possible.

"Our use of Oriol Financial Services was absolutely indispensable in getting our application for MassHealth approved.

Their professionalism and knowledge in this area made the process relatively stress free.

We could not have done this without them!

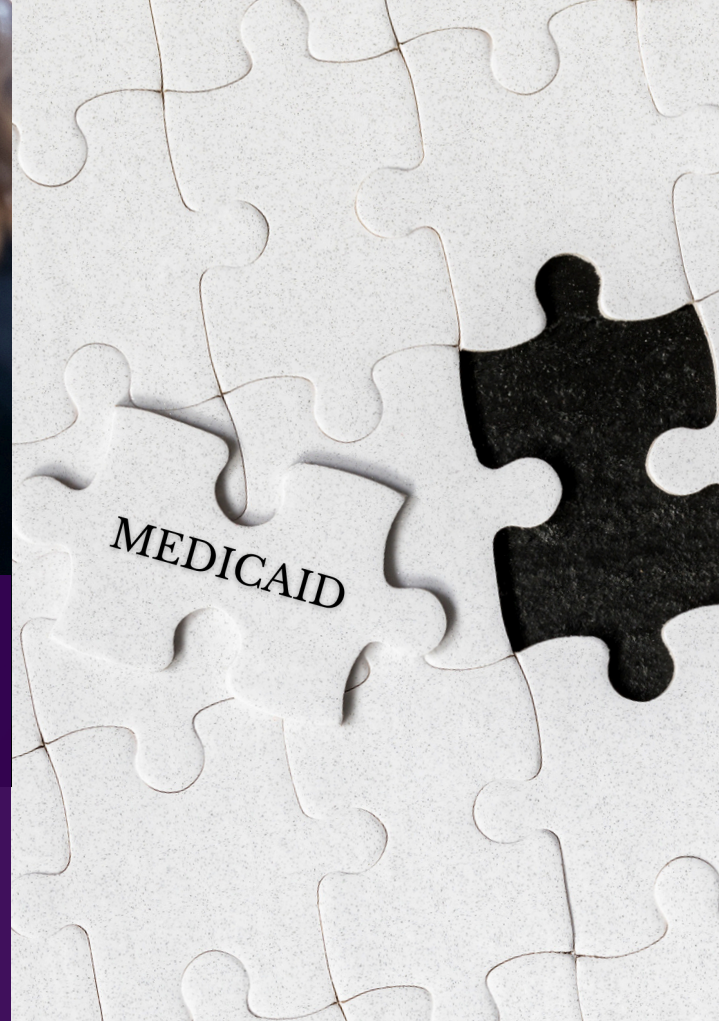
— Frank G.
Boylston, MA



Oriol Financial Services
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Phone, Fax or Text
(508) 829 - 1164

www.OriolHealthCare.com



ORIO FINANCIAL SERVICES

Medicaid Consultation &
Application Services

www.OriolHealthCare.com

Getting to Know Our Team

Navigating the Medicaid application process can be challenging, but with the support of Oriol Financial Services, you don't have to do it alone. Our dedicated team is here to assist you every step of the way.

We invite you to schedule a complimentary consultation with one of our team members.

Take a moment to meet our team:

- **Brenda Nordquist**
Senior Medicaid Liaison
bnordquist@oriolhealthcare.com
- **Danielle Giardina**
Medicaid Liaison
dgiardina@oriolhealthcare.com
- **Jessica Olson**
Medicaid Liaison
jolson@oriolhealthcare.com

**Please Note: Oriol Financial Services does not provide legal services. If legal assistance is required, we can refer you to a local professional specializing in estate planning.*

Your partners in navigating the complexities of Medicaid with care and expertise.

Choosing Oriol Financial Services means partnering with a team that understands the intricacies of Medicaid (MassHealth) and is committed to providing you and your loved ones with the support you deserve.

CALL, FAX, or TEXT: (508) 829-1164
Oriol Financial Services is here for you.

Why Choose Oriol Financial Services?

Making the difficult decision to move a loved one into long-term care is never easy, and the financial complexities can add to the stress.

Oriol Financial Services is here to guide you through the Medicaid (MassHealth) application process, providing the support and information you need to secure financial assistance.

Our services include:

- **Personalized Consultations:** We offer one-on-one consultations to understand your specific needs and provide tailored advice.
- **Application Assistance:** Our team helps you gather and complete all necessary documentation, reducing the risk of delays or denials.
- **Eligibility Assessment:** We evaluate your eligibility for Medicaid (MassHealth) benefits, offering clear explanations and guidance.
- **Follow-up Support:** We provide continuous support, including follow-ups with Medicaid (MassHealth) offices to track your application status.
- **Advocacy:** We advocate on your behalf to help you receive the benefits you deserve, resolving any issues that may arise.

Let us help you navigate these challenging decisions with confidence and care, ensuring your loved ones receive the quality care they deserve.

Financial Services Packages

Oriol Financial Services offers a pricing structure that is both economical and competitive within the industry. Our packages are designed to cater to a variety of application needs, with pricing based on the complexity of each case. Please note that these tiers are examples, and the final cost may vary depending on your unique application requirements.

TIER A \$1500.00

An application that consists of the following:

- No transfers of assets
- No spenddown needed
- A simple collection of bank statements
- A nursing screen, personal needs account letter, an SC-1 & private pay statement
- An establishment of a PPA
- No spouse in the community

TIER B \$2250.00

An application that consists of A above plus:

- Setting up a prepaid burial trust and a burial only account
- Verification of life insurance policies
- Verification of multiple checking and savings accounts closed in the last 5 years
- Spouse in the community
- A revocable trust

TIER C \$3000.00

An application that consists of A&B above plus:

- Verification of closed IRA, stocks, bonds, etc.
- Sale of a house
- Research of deed for sale of house in last 5 years
- Reverse mortgage
- Help cure a transfer of assets
- An irrevocable trust

If a MassHealth application is denied due to pre-existing legal contracts, we refer the applicant to legal counsel and do not handle such denials.