



Notice to Family Medical Assistance Estate Recovery

If your family member (decedent) had been on Medical Assistance (MA) after the age of 55 and/or had been in a long-term care facility, or at any age had received General Assistance (GAMC) or Alternative Care (AC), there are guidelines that Dakota County has regarding final funeral expenses in compliance with Minn. Stat. § 256B.15.

All assets remaining at the time of death, after reasonable funeral expenses have been paid, are considered part of your family member's estate and are subject to a MA Claim on behalf of the State of Minnesota and Dakota County.

Estate Assets Subject to Recovery, include (but are not limited to):

- Cash/Uncashed Checks
- Checking / Savings Accounts
(including Joint or POD accounts)
- Vehicles
- Prepaid Burial Policy Overages*
- Nursing Home Personal Needs Accounts
- Valuables *(i.e. collectibles, antiques, jewelry)*
- Life Estate *(recorded after August 1, 2003)*
- Real Property *(Real Estate)*
- Life Insurance
(if Beneficiary is the Estate or Funeral Home)
- Stocks / Bonds / Annuities
- Certificates (CDs) / Money Market Accounts
- Capital Credits from Utilities
- Trust Accounts
- Brokerage / Investment Accounts

***Prepaid Burial Policies**

If your family member had a burial policy, burial account, or an irrevocable/revocable burial contract, these dollars can be used for funeral expenses up to the dollar value of the policy. The funds must *"be distributed for the payment of the at-need funeral goods, funeral services, burial site goods or burial site services selected with any excess funds distributed to the beneficiary's estate."* See Minn. Stat. § 149A.97, subdivision 3a, clauses (9) and (10). Additional expenses may have limitations regarding the amount that can be used from the decedent's remaining assets.

Reasonable Funeral Expenses to be Paid from Decedent's Estate include:

- Certificates of Death *(Up to five)*
- Basic Funeral Home Services *(Cremation, Embalming)*
- Casket or Urn *(least expensive)*
- Clothing for the body
(only if clothing is unavailable)
- Vault
- Cemetery Plot
- Ground transportation of the body
- Costs of opening and closing grave or vault
- Grave Marker *(lowest cost stone)* and/or Engraving
- Winter Burial
- One Memorial Service, Viewing, and Visitation *(public visitation, funeral, or grave site service)*
- One Officiant Fee or required donation
- One Musician *(vocalist or instrumentalist)*
- One Basic Newspaper Obituary
(without picture for a one-day run)



Items that are NOT considered final expenses and may NOT be paid for from the medical assistance recipient's assets / funds include (but are not limited to):

- Memorial Folders, Gifts, Bequests, or Donations
- Flowers/Photos/Photo Board
- Thank You Cards & Stamps
- Family Travel, Lodging, or Meals
- Entertainment Not Listed Above
- Food and Beverage
- Police Escort
- Planning Costs

Please contact the Estate Recovery team to discuss approved expenses prior to using funds from the family member's assets.

Dakota County Estate Recovery

Email: EstateRecovery@co.dakota.mn.us

Phone: 651-554-6555

Mail: Dakota County Collections

Attn: ESTE

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