

March 5, 2025

Attorneys at Law
Whitney Yazzolino
Julie Meyer Rowett

Senate Committee on Human Services

*Re: SB 1029
Caregiving Child Exception*

Dear Chair Gelser Blouin, Vice Chair Linthicum, and committee members:

Thank you for your time and consideration at yesterday's hearing. I was struck by the committee's clear attention and compassion to all Oregonians present at the hearing. Yazzolino & Rowett writes in strong support of SB 1029. Our office specializes in long-term care planning, incapacity planning, and Medicaid benefit advocacy.

Caregiving children are adult children who move in with and care for their parents and provide invaluable and necessary assistance, preventing their parents from needing to move into long-term care facilities, and/or needing to access Medicaid benefits for at least two years. In doing so, they often sacrifice employment opportunities and contributions to their own retirement, as well as other benefits that we receive from employment.

Presently, Oregon law allows parents to transfer their primary residence to a caregiving child without penalty. If title is not transferred prior to their death, the caregiving child has no protections, and the home is subject to estate recovery. SB 1029 seeks to remove this limitation, ensuring the transfer can occur both before and after the Medicaid recipient's passing. The proposed approach is equitable and allows all Oregonians the same protection. In a time when access to legal representation is limited, it is vital that we ensure fair policies that seek to protect all Oregonians.

SB 1029 acknowledges caregiving children's vital role, promotes fairness, and supports housing security. Caregiving children invest in their parents' homes—covering mortgages, taxes, and maintenance—while providing critical care that saves state resources and eases the burden on an already strained long-term care system. It also supports housing security in Oregon, as caregiving children are often living in, investing in, contributing to mortgages and property taxes for their parents' home, all while caring for their parents.

Thank you for your time and we urge you to support SB 1029!

Sincerely,

A handwritten signature in blue ink, appearing to read 'Julie Meyer Rowett'.

Julie Meyer Rowett, Partner
Yazzolino & Rowett, LLP

A handwritten signature in blue ink, appearing to read 'Whitney Yazzolino'.

Whitney Yazzolino, Partner
Yazzolino & Rowett, LLP

A handwritten signature in blue ink, appearing to read 'Gina Goddard'.

Gina Goddard, Associate Attorney
Yazzolino & Rowett, LLP