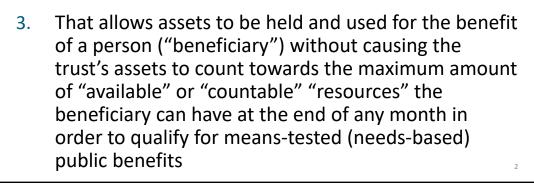


A Special Needs Trust is...

- 1. A trust
- 2. That has a special needs distribution clause



Special

Needs

Trust

1

What is a Special Needs Trust? A Special Needs Trust... Allows trust assets to be used for the benefit of the beneficiary without disqualifying the beneficiary from Medicaid, SSL and any other means tested (also known)

- Medicaid, SSI, and any other means-tested (also known as "needs-based") public assistance programs.
- Trust assets are used to supplement, not replace, the public benefits the beneficiary is receiving.

Why Use a Special Needs Trust?

Allow the trust beneficiary to qualify for means-tested public assistance, which provides...

 small amount of income, basic health care, and some needed services

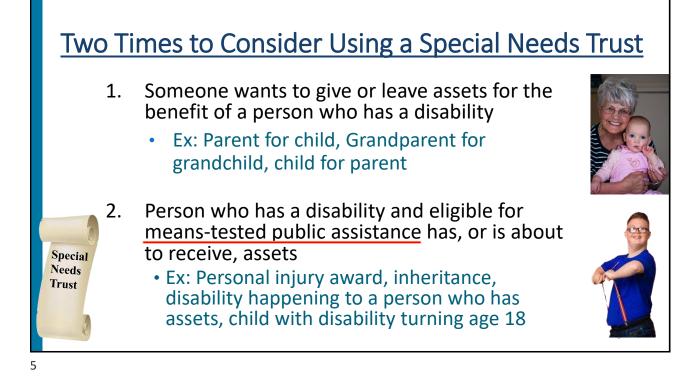
Special Needs Trust

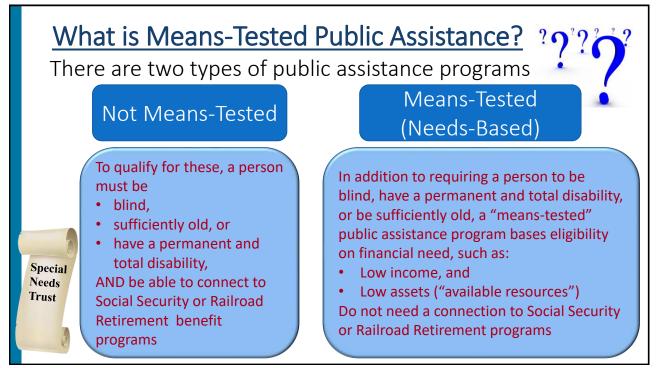
Special Needs

Trust

3

While trust assets are used to provide services and items that will help the beneficiary, but are not adequately provided by public assistance programs





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Title search: Setting Up the Trust, Part I: First and Third Party Trusts vs. Pooled Special Needs Trusts

First appeared as part of the conference materials for the 2023 Essentials for Special Needs Planning (REPLAY) session "Setting Up the Trust, Part I: First and Third Party Trusts vs. Pooled Special Needs Trusts"