THE ADVANTAGES OF A SPECIAL NEEDS TRUST

• Provides financial assistance to a disabled person without disqualification from public assistance benefits

• Permits payments for clothing, transportation, recreation, case management, telephone, household goods, medical and dental, travel, incidentals, and more, without limitation

• Beneficiary has no control over the operation or distributions of the trust

• Trust assets are not available to creditors of beneficiary or trustee

• Income on trust assets is not taxable to trustee

• Continuation in existence until beneficiary’s death, then remaining assets go to designated persons

• Can be established by will or trust so terms are not fixed until after death

• Can be established to become effective immediately so that multiple persons can make gifts to it in their wills and trusts

For more information, contact:

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