

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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