Special Needs Trusts

This presentation will cover estate planning for beneficiaries with special needs, including the following:

* What is a Special Needs Trust?
* Reasons to have a SNT
* Types of SNTs: First Party, Third Party, Pooled Trust
* What assets can a SNT own?
* Permissible distributions from SNTs
* Overview of Social Security disability programs
  + Social Security Disability Insurance
  + Supplemental Security Income
* How can trust distributions impact SSI?
* Paying caregivers from SNT
* SNT Planning Mistakes
* Important Responsibilities of the Trustee
* SNT Planning Examples