Paying Post-Death Claims, Debts & Expenses from a First Party SNT

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A Sad But Common Story

The Beneficiary . . . .

Severely Disabled Child

Injured Due to Negligence of Another

Receives Large Personal Injury Settlement

Settlement Placed in a First Party SNT

A Sad But Common Story

The Beneficiary . . . .

Child Receives Medicaid Benefits

Mom Cannot Work, Cares for child 24-7

Additional Caregivers Paid Through Waiver Program

A Sad But Common Story

The Trust . . .

First Party SNT, with Medicaid Payback

Owns the Home Where Mom & Child Live

Mom Declines to Be Paid for Caregiving

A Sad But Common Story

The Child Dies . . .

Medicaid Reimbursement Exceeds Assets in the Trust

$500,000 Left in the Trust

Medicaid Claim Exceeds $1M

A Sad But Common Story

Post-Death Requests by Mom . . .

Can the Trust Pay for My Child's Funeral?

Can I Be Paid for All of My Caregiving Now?

Can I At Least Keep the House?

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Also available as part of the eCourse
Death, Divorce, and Special Needs Trusts: What to Expect and How to Help Your Clients

First appeared as part of the conference materials for the
15th Annual Changes and Trends Affecting Special Needs Trusts session
"Outstanding Debts vs. Medicaid Payback: Does Death Kill the Debt?"