Pooled Special Needs Trust Best Practices

True Link Financial
2016

About True Link Financial

True Link Financial is a San Francisco-based company committed to increasing the independence and financial well-being of seniors, adults with disabilities, and vulnerable individuals. The company provides tools that can be self-managed or administered by family members or professionals such as trust administrators, guardians, and representative payees. True Link's offerings include the True Link Card, a reloadable payment card used to make compliant funds disbursements from special needs trusts, and True Link Financial Advisors, the company's wealth management division offering a diverse suite of investment and capital planning solutions.

For more information about True Link Financial, please visit www.truelinkfinancial.com.

Letter from the Chief Operating Officer

We founded True Link to provide high-quality financial services that enhance the independence and well-being of populations that have traditionally been underserved. With this mission, it was only a matter of time before we began to work with pooled special needs trusts, nonprofits that provide individuals with disabilities a way to retain government benefits eligibility while accessing supplemental funds that contribute to their quality of life and well-being.

Today, we partner with scores of pooled trusts across the country to bring compassionate, knowledgeable, and high-quality financial services to their beneficiaries. While the field of pooled trusts is a young one, a result of enabling legislation passed in 1993, it is rapidly growing and continuously improving. We see on a daily basis that every increase in trust efficiency has a direct impact on beneficiaries' quality of life, which is why we've decided to share what we've learned through these partnerships. Given the number of pooled trusts we support and the close relationships we build with administrators, True Link is in a unique position to see differences and similarities across operational strategies, as well as challenges and successes across organizations. We've collected this information and developed a short list of best practices—as conveyed to us by professionals in the field—with the hope that this document serves as a resource for pooled trusts looking to provide the best service possible to individuals with disabilities.

Sincerely,
Claire McDonnell, COO
True Link Financial

First appeared as part of the conference materials for the
16th Annual Changes and Trends Affecting Special Needs Trusts session
"Pooled SNTs: Guidelines for Best Practices"