

16TH ANNUAL CHANGES AND TRENDS AFFECTING
SPECIAL NEEDS TRUSTS

February 13-14, 2020

Austin, Texas

CASE STUDIES

Interplay of Guardians and Trustees In and Out of Court + Administering SNTs Established in Other States and Other SSA Regions

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PANEL

Peter J Wall
True Link Financial

Haley Greer
The Arc of Texas Master Pooled Trust

Nancy Sosa
Cadence Bank – Trust & Asset Management

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Renée Lovelace
The Lovelace Law Firm, P.C.

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House + Wasting SNT

See Accompanying Paper by Peter Wall – Pages 4-7

Case – SNT Owns Home – Background:

- Beneficiary resides in the home
- Trust supplements Medicaid-funded care costs



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House + SNT Decline

See Accompanying Paper by Peter Wall – Pages 4-7

Case – SNT Owns Home – Problems:

- SNT Rapid Depletion
- Trustee and Guardian have different goals

Trustee → find alternatives to extend trust

Guardian → stay in house despite SNT decline

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House + SNT Decline

See Accompanying Paper by Peter Wall – Pages 4-7

Case – SNT Owns Home – Approaches

Moving forward:

- Court instructions
- Alternative Dispute Resolution
- Care manager assessments
- Other

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House + SNT Decline

See Accompanying Paper by Peter Wall – Pages 4-7

Case – SNT Owns Home – Approaches

Looking Backward:

- Early identification of problems
 - Determine and assess expectations
 - Initial and periodic projections (Monte Carlo simulations/trust longevity)
- Communication and collaboration

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Title search: Interplay of Guardians and Trustees In and Out of Court + Administering SNTs Established in Other States and Other SSA Regions (Case Studies)

Also available as part of the eCourse

[2020 Special Needs Trusts eConference](#)

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16th Annual Changes and Trends Affecting Special Needs Trusts session

"Interplay of Guardians and Trustees In and Out of Court + Administering SNTs Established in Other States and Other SSA Regions (Case Studies)"