Special Needs Trust Decision Tree Analysis

13th Annual Changes and Trends Affecting Special Needs Trusts University of Texas School of Law

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> > Presented by

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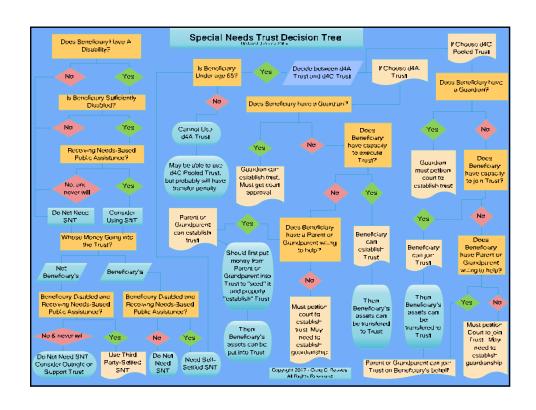
Trusts are not used unless there is a reason

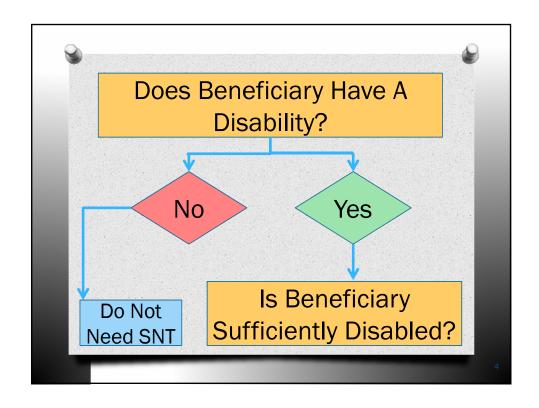
When should an attorney consider using a special needs trust?

If it is decided that a beneficiary needs a special needs trust, what are the options and which type is best for the beneficiary?

Today we will walk through the analysis required to answer these questions.

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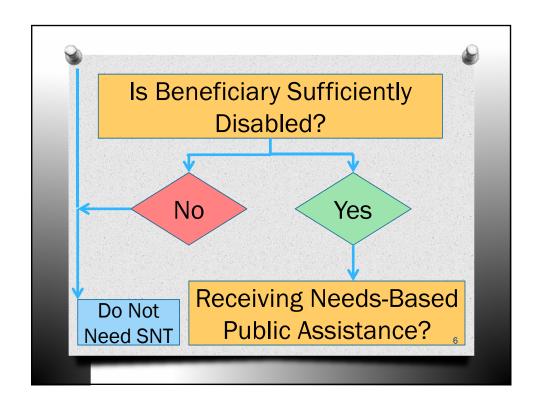


WHAT IS "SUFFICIENTLY DISABLED"?

Usually SSI definition is used:

"Unable to engage in any <u>substantial gainful</u> <u>activity</u> by reason of any <u>medically</u> <u>determinable physical or mental impairment</u> which can be expected to result in <u>death</u> or which has lasted or can be expected to last for a <u>continuous</u> period of not less than <u>twelve months</u>."

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Title search: Special Needs Trust: Decision Tree Analysis

Also available as part of the eCourse Answer Bar: Considering a Special Needs Trust

First appeared as part of the conference materials for the 13th Annual Changes and Trends Affecting Special Needs Trusts session "Special Needs Trusts: Decision Tree Analysis"