
Special Needs Trust Decision Tree Analysis

13th Annual Changes and Trends Affecting
Special Needs Trusts
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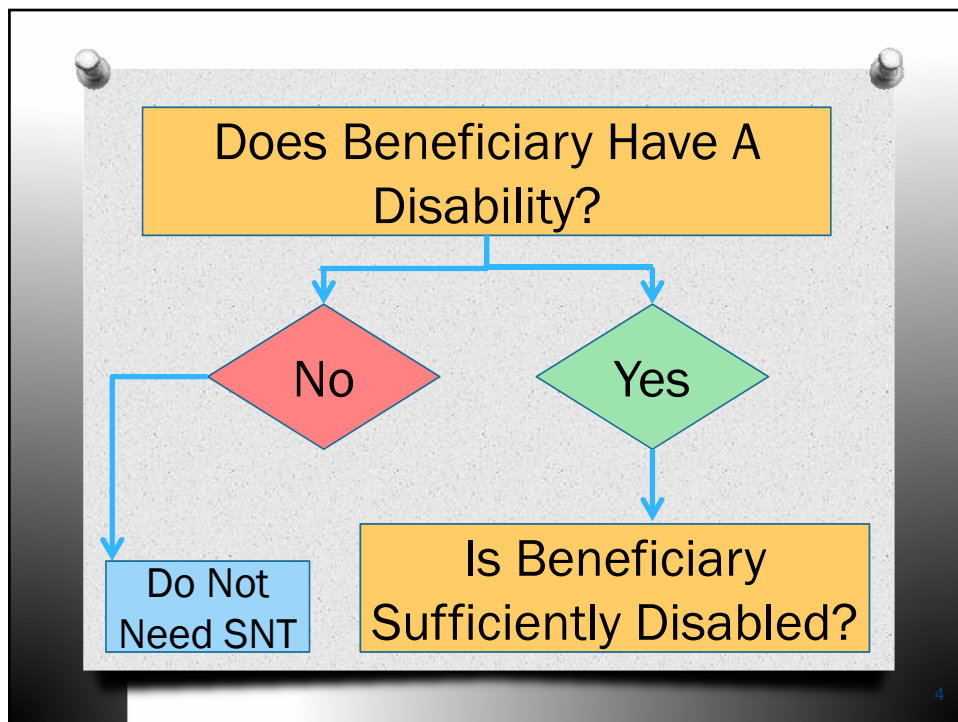
Trusts are not used unless there is a reason

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.

2

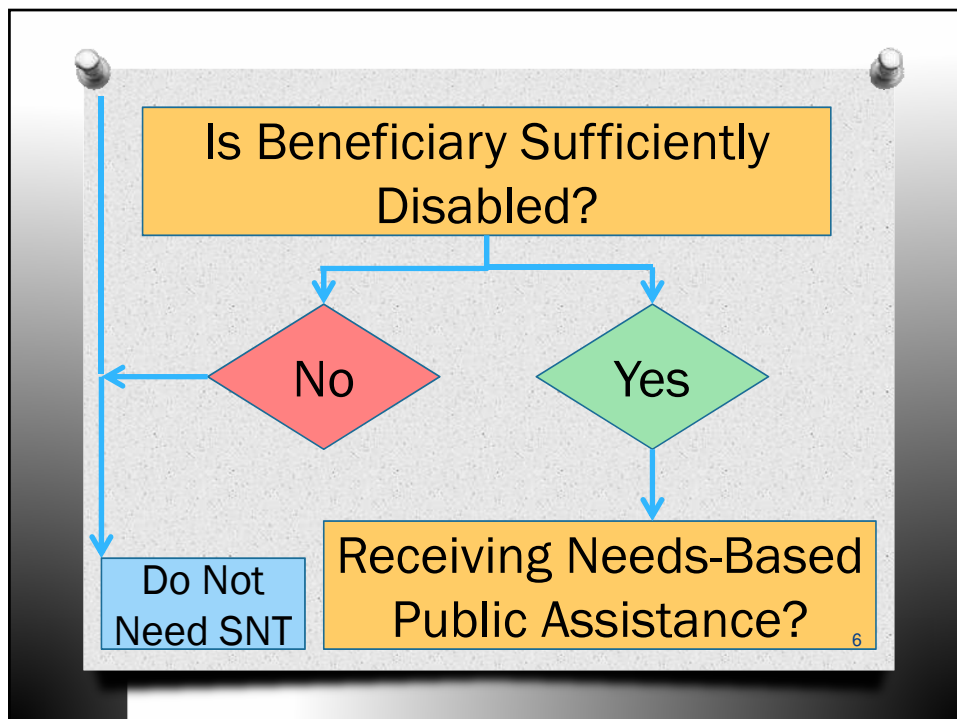


WHAT IS “SUFFICIENTLY DISABLED”?

Usually SSI definition is used:

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

5



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