## Practice Tips for Special Needs Trust Attorneys

UNIVERSIIY OF TEXAS SC HOOLOF IAW  $14^{\rm TH}\,{\rm ANNUAL\,SPEC\,IAL\,NEEDS\,TRUSIS\,C\,O\,NFERENC\,E}$  FEBRUARY 16, 2018

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## Read the POMS

- ▶ Take the time to read carefully.
  - ► SI 01120.199: Early Termination Provisions and Trusts
  - ► SI 01120.200: Trusts General, Including Trusts Established Prior to Established with the Assets of Third Parties and Trusts Not Subject 1613(e) of the Social Security Act
  - ► SI 01120.201: Trusts e stablished with the assets of an individual on or 1/1/00
  - ► SI 01120.202: Development and Documentation of Thusts Established on or After 01/01/00
  - ► SI 01120.203: Exceptions to Counting Trusts Established on or after 1/1/00
  - ► SI 01120.204: No tices for Trusts Established on or after 1/1/00
  - ► SI 01120.225: Pooled Trusts Management Provisions SI 01120.227: Null and Void Clauses in Trust Documents





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Also available as part of the eCourse Working with SSA: Regional Trust Leads, Updates to the SSA POMS, and more

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