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: Tusts General, Including Tusts Established Prior to Established with the Assets of Third Parties and Tusts 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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Title search: Practice Tips for Special Needs Trust Attorneys

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

First appeared as part of the conference materials for the $14^{\rm th}$ Annual Changes and Trends Affecting Special Needs Trusts session "Working with SSA Part II: Updates to the SSA POMS regarding trusts, Practice Tips, Reporting and More"