

**A Walk Through the POMS  
and  
The Long-Awaited Updates of 2018**



Presented By:

**Stephen W. Dale**

The Dale Law Firm, PC

*Presented to*

**The University of Texas School of Law  
15<sup>th</sup> Annual Special Needs Trusts Conference  
February 7-8, 2019  
Austin, Texas**

# About the Presenter

## Stephen W. Dale, Esq., LL.M

Founding Attorney of The Dale Law Firm and Disability Rights Advocate

- Attends disability rights activities, including legislative hearings and serving on boards and committees of disability rights organizations
- Recipient of the prestigious 2010 Theresa Foundation Award and 2007 NAELA Powley Award
- Board of the ARC of California and member of the Special Needs Alliance
- Frequent speaker on a variety of disability related topics across the country
- Regularly teaches courses to the public, financial professionals, and other attorneys on special needs trusts and trust administration

Public service website: [www.achievingindependence.com](http://www.achievingindependence.com)

Golden State Pooled Trust [www.gspt.org](http://www.gspt.org)

# POMS UPDATES

*Since the 2018 UT SNT Conference Include:*

Transmittal 51 – Changed SI 01120. 200

Transmittal 52 – Changed SI 01120. 201

Transmittal 53 – Changed SI 01120. 203

Transmittal 54 – Changed SI 01120. 202

Finding the POMS – <https://policy.ssa.gov>

**POMS → <https://policy.ssa.gov>**

*Easy to find – internet search on  
“POMS” + “SSA”*

**Changes to SI 01120.200-203**

**POMS → <https://policy.ssa.gov>**

*Select: “Table of Contents”*

*Select: “SI Supplemental Security Income”*

*Select: “011 Resources”*

*Select: “SI 01120.200: Information on Trusts. . .”*

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## Title search: A Walk through the POMS and The Long-Awaited Updates of 2018

Also available as part of the eCourse

[2019 Special Needs Trusts eConference](#)

First appeared as part of the conference materials for the  
15<sup>th</sup> Annual Changes and Trends Affecting Special Needs Trusts session  
"A Walk through the POMS: Section by Section Updates"