

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



Presented By:

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Presented to

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15th Annual Special Needs Trusts Conference
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About the Presenter

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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

Golden State Pooled Trust 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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Also available as part of the eCourse

[2019 Special Needs Trusts eConference](#)

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15th Annual Changes and Trends Affecting Special Needs Trusts session
"A Walk through the POMS: Section by Section Updates"