

Self-Settled SNTs

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When Do We Need One?

beneficiary under 65 seeking benefits

Someone already on benefits

- Inheritance or other benefit
- Personal injury recovery

What Benefits Does the Beneficiary Receive?

- Disability – SSI, SSDI, CDB/DAC
- Medicaid
 - Over 40 Medicaid programs in Texas
- Food stamps (SNAP)
- HUD housing
- Mental health benefits

Creation of a SNT

Creation of SNTs

Self-Settled Trusts and Court-Created SNTs

Third-Party Settled Trusts

Self-Settled and Court-Created SNTs

Beneficiary's own funds

Beneficiary cannot be the trustee

Doesn't matter that beneficiary may not have ever actually possessed funds, so long as he was legally entitled to them (i.e. inheritance or personal injury recovery)

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