

# Special Needs Trust Overview

**15<sup>th</sup> Annual Changes and Trends Affecting  
Special Needs Trusts**

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**Introduction:  
Scope of Today's Presentation**

**Part 1: Planning with Trusts**

**Part 2: SNTs & Public Benefits Programs**

**Part 3: SNTs & Related Alternatives**

**Part 4: The Third-Party SNT**

**Part 5: Planning Opportunities**

**Part 1:  
Planning with Trusts**

## Planning with Trusts

- Trust law is comprised of many moving parts
- Some trusts are more basic & some extremely complex
- In order to understand SNTs, one must know:
  - The basic principles of trust law
  - The public benefit program rules
  - How the program rules and statutes affect trust planning
- Each principle discussed in this section applies to SNTs

## Planning with Trusts

- Who **creates** the trust?
- What is the **legal basis** governing the creation of the trust?
- When does the trust become **effective**?
- Who is the intended **beneficiary**?
- What type of **benefits** is the trust providing?
- What are the **distribution** considerations?
- The answers to these questions are determined by the specific goals that we are trying to achieve for our client

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"Special Needs Trusts Overview and Third-Party SNTs"