

Special Needs Trust Overview

**15th 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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