Special Needs Trust Overview

15th Annual Changes and Trends Affecting Special Needs Trusts

> February 7, 2019 Austin, Texas

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Introduction: Scope of Today's Presentation Part 1: Planning with Trusts

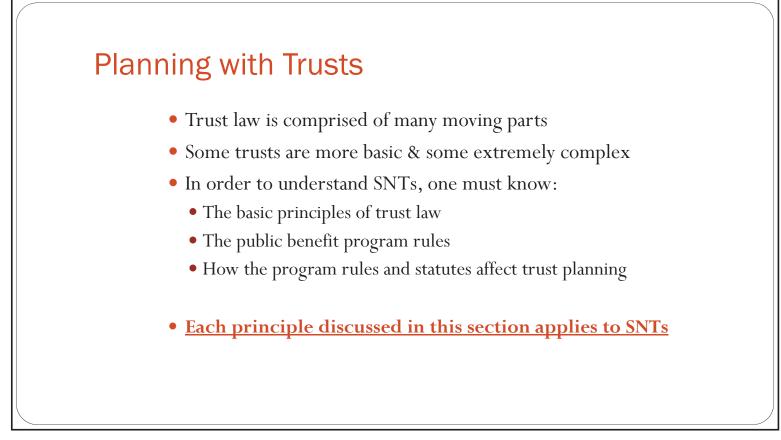
Part 2: SNTs & Public Benefits Programs

Part 3: SNTs & Related Alternatives

Part 4: The Third-Party SNT

Part 5: Planning Opportunities

Part 1: Planning with Trusts



Planning with Trusts

- 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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Also available as part of the eCourse 2019 Special Needs Trusts eConference

First appeared as part of the conference materials for the 15th Annual Changes and Trends Affecting Special Needs Trusts session "Special Needs Trusts Overview and Third-Party SNTs"