

Pooled SNTs:

Guidelines for Best Practices

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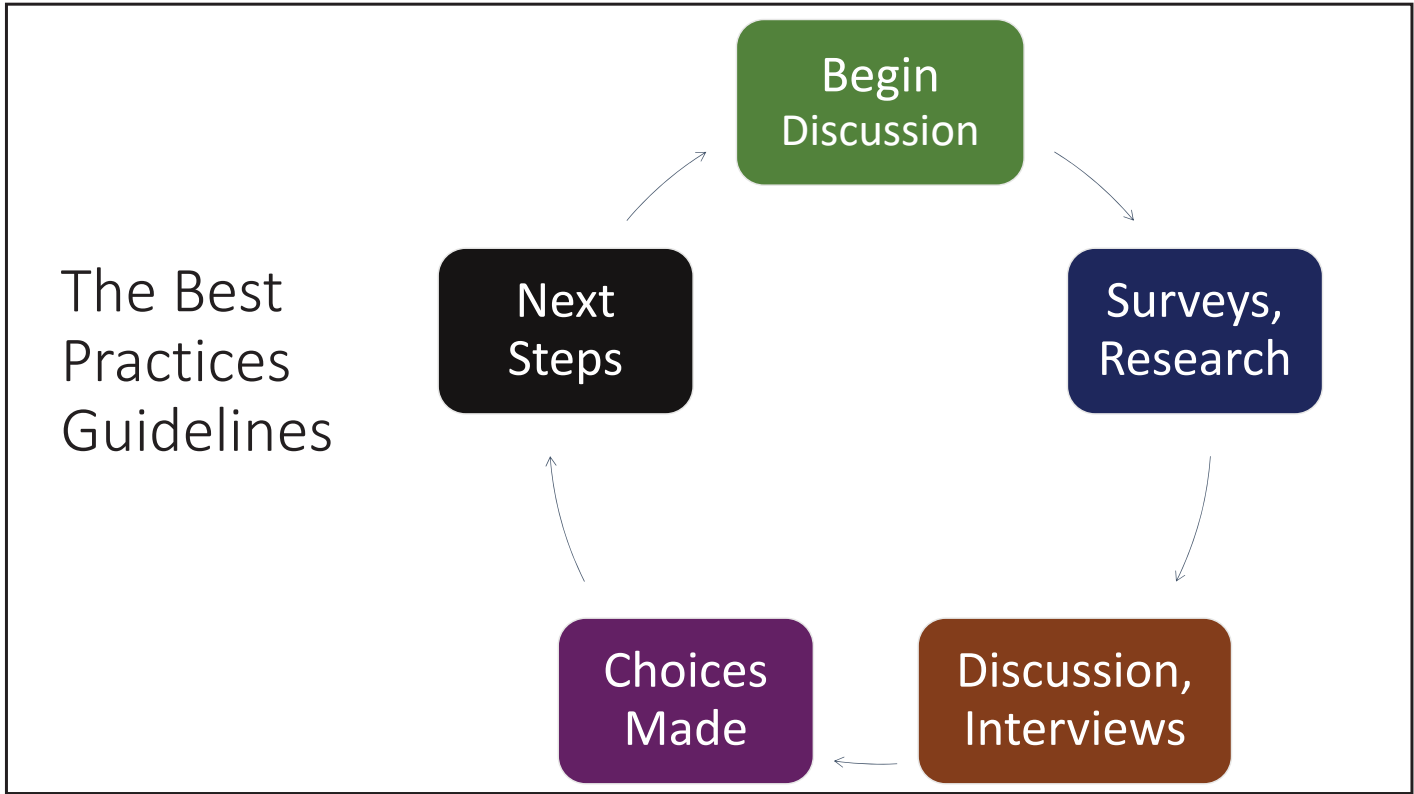
1

The Life Passages Planning Project

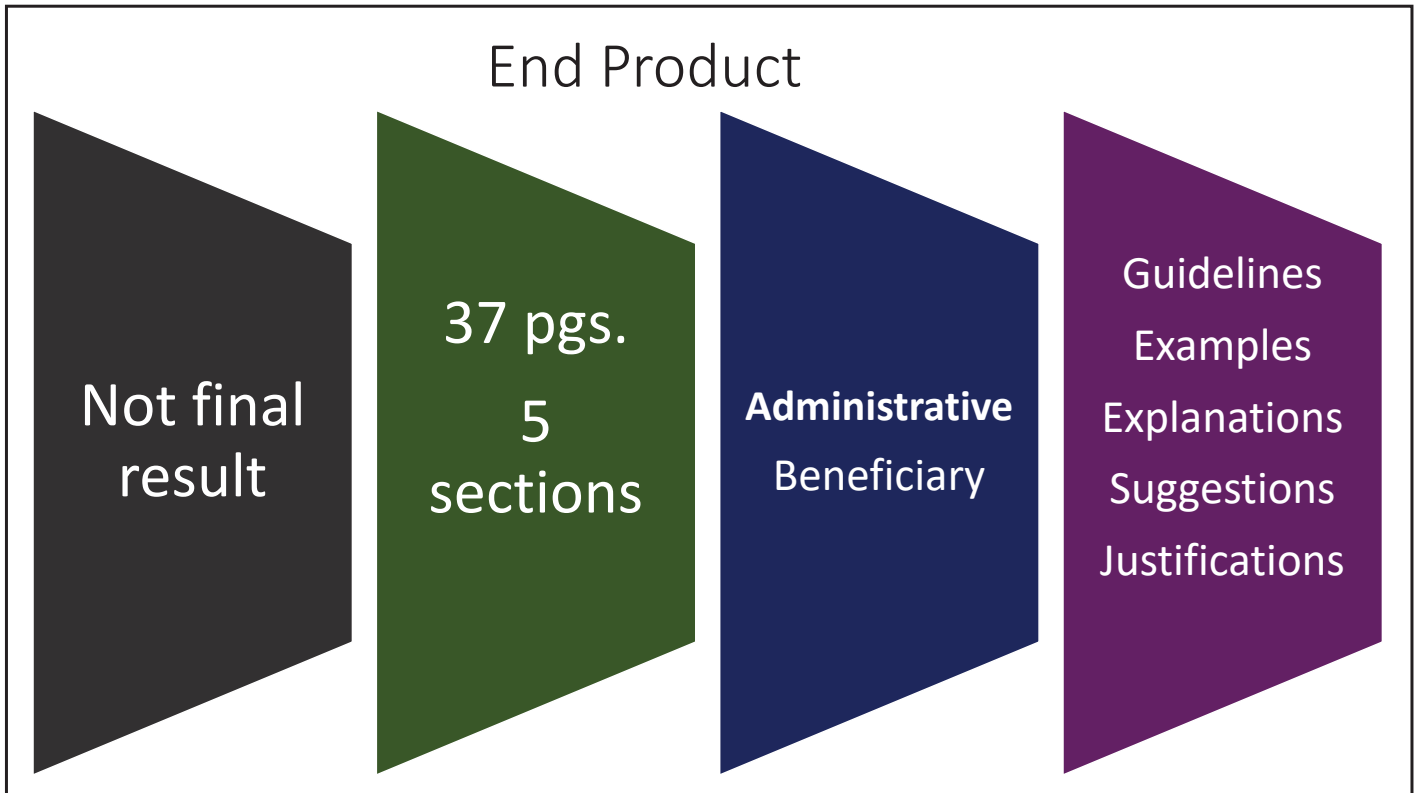
- History.
- Timeline.
- Who we are.
- Why we did what we did?



2



3



4

Financial Management of the Trust

- Distributions
- Investments
- Insurance
- Audits
- Record Keeping
- Communications
- Fees
- Tax Exempt Status
- Transfers from 1 PSNT to Another
- Financial Provisions for PSNT
- Retained Funds
- Confidentiality
- Contracting with 3rd Parties & Use of Agents

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Trust Management



Best Practices

Policies & Procedures

Strategic Partnerships

Media

Technology

Real Estate

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[2020 Special Needs Trusts eConference](#)

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