

Pooled SNTs:

Guidelines for Best Practices

Rebecca C. Morgan

Stetson University College of Law

www.stetson.edu/elderlawllm



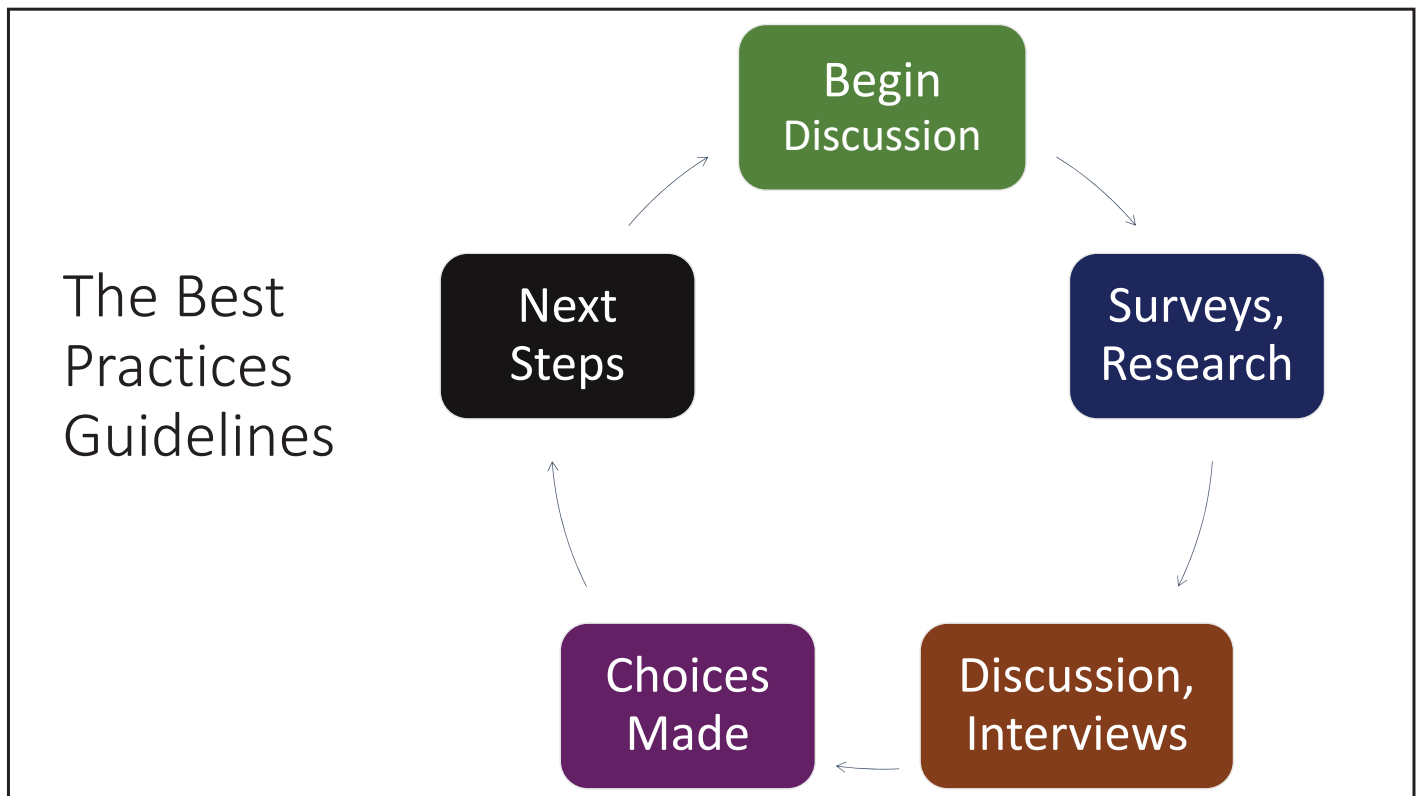
1

The Life Passages Planning Project

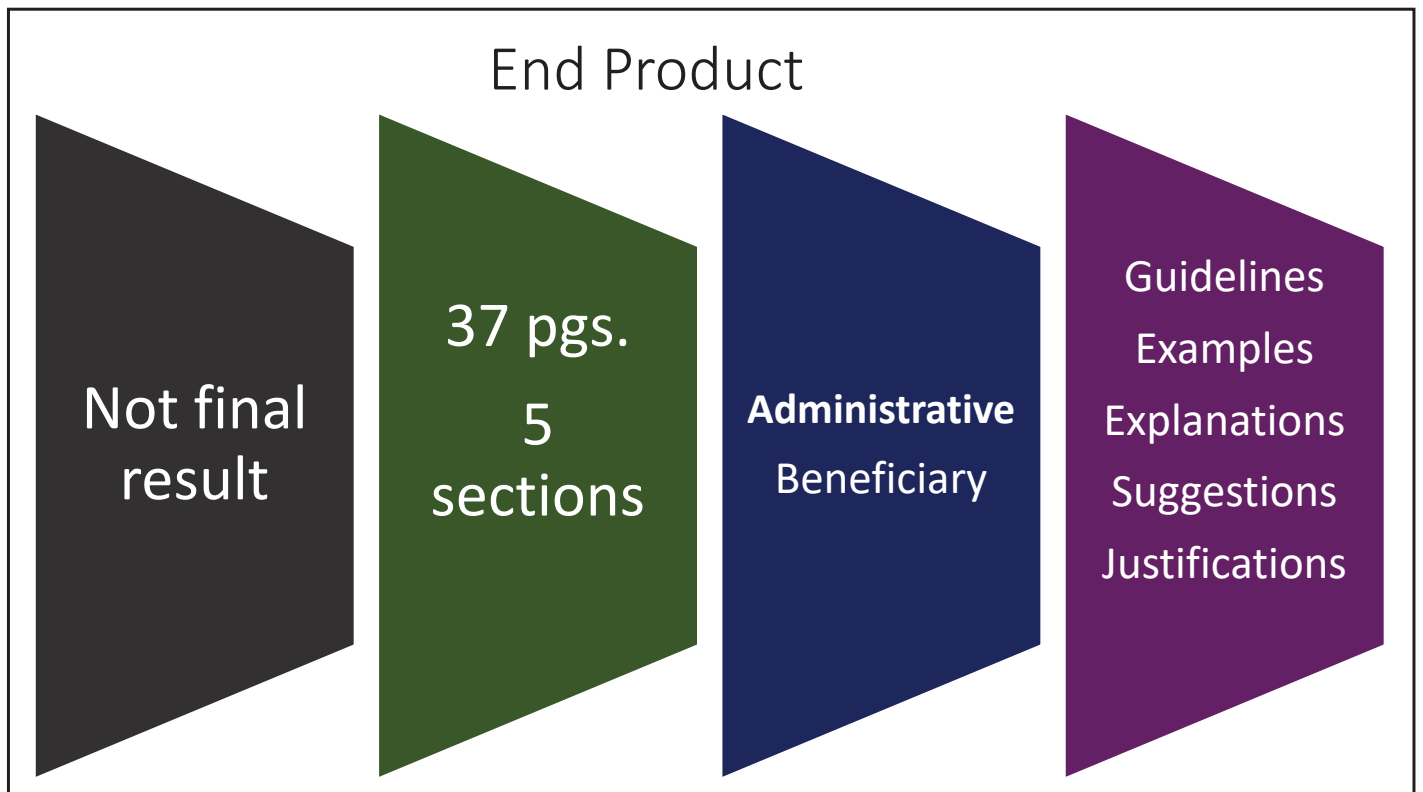
- History.
- Timeline.
- Who we are.
- Why we did what we did?



2



3



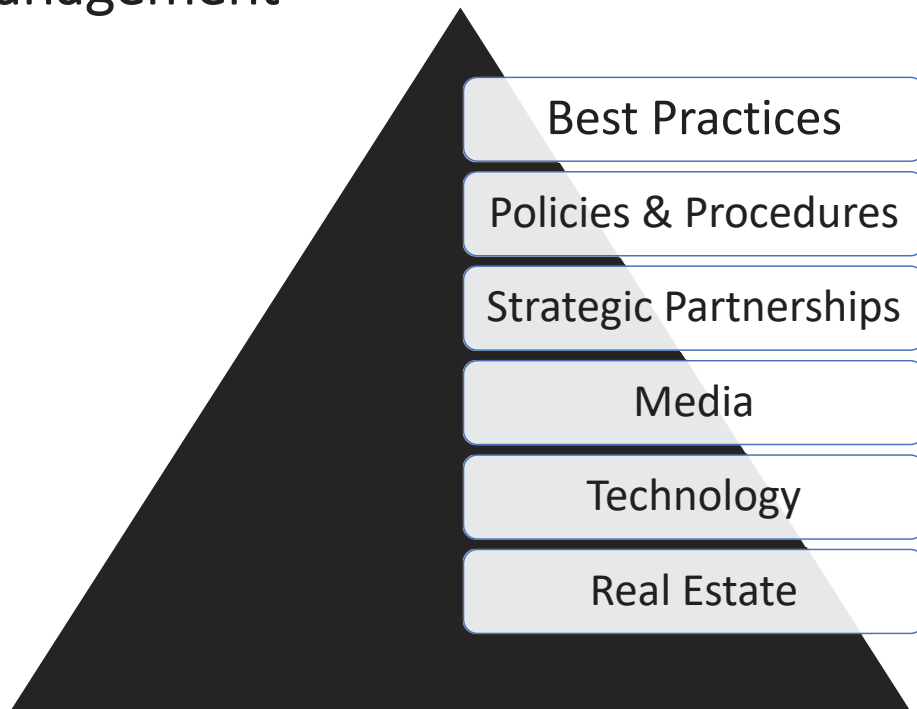
4

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

5

Trust Management



6

Find the full text of this and thousands of other resources from leading experts in dozens of legal practice areas in the [UT Law CLE eLibrary \(utcle.org/elibrary\)](http://utcle.org/elibrary)

Title search: Pooled SNTs: Guidelines for Best Practices

Also available as part of the eCourse

[Special Needs Trusts Basics and Best Practices](#)

First appeared as part of the conference materials for the
16th Annual Changes and Trends Affecting Special Needs Trusts session
"Pooled SNTs: Guidelines for Best Practices"