

Planning for Beneficiaries with Disabilities

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Impact on Practice Areas

- Estate Planning
 - Planning for a beneficiary with disabilities
- Probate
 - Managing an inheritance or non-probate assets received by a beneficiary with disabilities
- Guardianship
 - Seeking government benefits for a ward
 - Managing child support

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Our Time Today

- Government Benefits for People with Disabilities
- Special Needs Trusts
 - Types and Differences
- ABLE Accounts
- Strategies

Government Benefits

Learning About Beneficiary's Benefits

- Current Benefits
- Pending Applications
- Likely Future Benefits

What Benefits Does the Beneficiary Receive?

- Medicaid - Over 40 Programs in Texas
- "Disability" – SSI, SSDI, CDB/DAC
- Medicare
- Food stamps (SNAP)
- HUD housing
- Mental health benefits

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Title search: Planning for Beneficiaries with Disabilities

Also available as part of the eCourse

[2020 Stanley M. Johanson Estate Planning eConference](#)

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