

What Every Estate Planner Needs to Know About Pooled Special Needs Trusts

*Presented by Joanne Marcus, MSW and Karen Dunivan Konvicka, J.D.
Commonwealth Community Trust (CCT)*

UT LAW CLE

www.trustCCT.org | 804-740-6930



1

2



Joanne Marcus, MSW

Joanne Marcus has served as President/CEO of Commonwealth Community Trust (CCT) for 21 years. Under her leadership the agency has grown to provide trust administration services to over 2,000 beneficiaries throughout the United States. Ms. Marcus is frequently asked to speak to professional groups and community organizations nationwide.

Contact: jmarcus@trustCCT.org

UT LAW CLE

www.trustCCT.org | 804-740-6930



2

Karen Dunivan Konvicka, J.D.

Karen Dunivan Konvicka serves as Director of Client Services and General Counsel for Commonwealth Community Trust (CCT). When in private practice, Ms. Konvicka specialized in public benefits law and estate and trust planning and administration for individuals with special needs. Ms. Konvicka maintains her memberships in the Virginia State Bar, National Academy of Elder Law Attorneys (NAELA), and the Virginia Academy of Elder Law Attorneys (VAELA) and enjoys continuing to educate attorneys and families about special needs planning from the pooled trust perspective.



Contact: kkonvicka@trustCCT.org



www.trustCCT.org | 804-740-6930



NOTE

*Texas law and regulations
may differ.*

NOTE

Content throughout this presentation is based on federal law and where applicable notes that some state law may differ.

Some terminology may not conform to the laws, regulations, and practices of Texas.



www.trustCCT.org | 804-740-6930



Public Benefits –

For the Aged, Blind and Disabled

Categorically Eligible for Medicaid

- Typically receiving means-tested income benefits
- Cap on resources and income
- Traditional Medicaid

Medically Needy for Medicaid

- Typically not receiving means-tested income benefits
- Cap on resources, but income can be “spent down” on an ongoing basis
- Usually Medicaid Long Term Care

UT LAW CLE

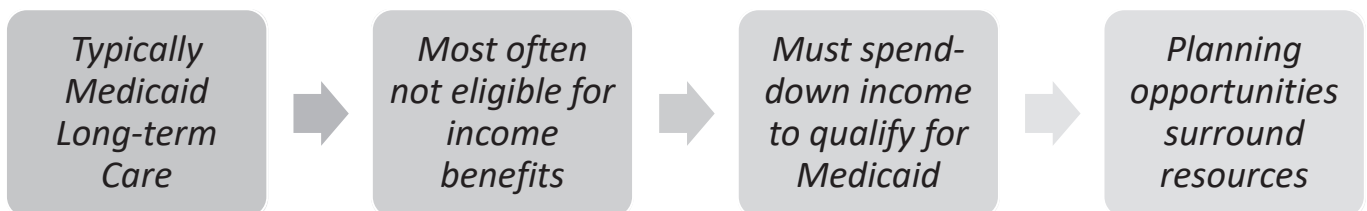
www.trustCCT.org | 804-740-6930



5

Elder Law Planning

Public benefits for the *Medically Needy*:



UT LAW CLE

www.trustCCT.org | 804-740-6930



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 \(utcle.org/elibrary\)](https://utcle.org/elibrary)

Title search: What Every Estate Planner Needs to Know About Pooled Trusts

Also available as part of the eCourse

[2021 Estate Planning, Guardianship, and Elder Law eConference](#)

First appeared as part of the conference materials for the 23rd Annual Estate Planning, Guardianship and Elder Law Conference session "What Every Estate Planner Needs to Know About Pooled Trusts"