

Attachment “A”

Power Point Slides for the Panel:

**Financial Projections for Quality of Life Possible When Factoring In Public and
Private Resources**

Financial Projections for Quality of Life Possible When Factoring In Public and Private Resources

**18th Annual Changes and Trends Affecting
Special Needs Trusts
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Imagine



- You have a 17 year old daughter named Kathy who has a significant disability.
- Kathy is likely to need some level of assistance for the rest of her life.
- You come to the estate planning attorney to provide for her needs in the event of your incapacity or death.
- Kathy is otherwise healthy and is likely to live 70 years or longer.

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The Challenge



- ▶ Benefit laws will change
- ▶ Social service systems will change
- ▶ Her condition may change
- ▶ Her advocacy system may change
- ▶ Attitudes may change
- ▶ The amount of resources she needs may change
- ▶ Trustee options will change
- ▶ She might move to a different state where the rules change
- ▶ She might get a job

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The Magic Document Syndrome

- It has become very commonplace for parents to realize it is important to create a special needs trust to provide for their child's quality of life.
- All too often the creation of the document is seen as the objective rather than a tool to meet a goal.
- A special needs trust should be a document that creates a system not only to provide the distributions that the beneficiary needs. . .
- It should also create a checks and balance system of accountability to make sure that the goal of maintaining the quality of life is maintained.



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Title search: Financial Projections for Quality of Life Possible When Factoring in Public and Private Resources

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