

PRESENTED AT

20th Annual Changes and Trends Affecting Special Needs Trusts

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SSA Regional Trust Lead Presentation Regarding SSI Trusts

Amanda Flood

Speaker Contact Information:

Amanda Flood
Social Security Administration
Dallas Regional Office
1301 Young St, Suite 627
Dallas, TX 75202
Amanda.Flood@ssa.gov

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Objectives

- ▶ Policy for Disbursements from Trusts
- ▶ Policy for Earnings on and Additions to Trusts
- ▶ Posteligibility Changes in Trust Resource Status
- ▶ Q&A Session (if time permits)

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Disclaimer

- ▶ This presentation discusses general SSI trust policy and procedures.
- ▶ Specific cases involving an SSI claim or post-eligibility event require initial evaluation by the servicing field office technician and subsequent evaluation by the regional trust reviewer team and when applicable, an evaluation by the Office of the General Counsel.

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Objective 1 – Policy for Disbursements from Trusts (1/2)

- ▶ Program Operations Manual System (POMS) SI 01120.2011 – Trust Established with the Assets of an Individual on or after 01/01/2000
- ▶ Foster Care Independence Act of 1999 (P.L. 106-169) Section 205
 - Generally, trusts established with the assets of an individual is a resource for SSI eligibility purposes
 - Addresses when to consider earnings/additions as income

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