

PRESENTED AT

17th Annual Changes and Trends Affecting Special Needs Trusts

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**SSA Regional Trust Leads Presentation Regarding
SSI Trusts**

Amanda Flood & Dana Marquez

Speakers Contact Information:
Amanda Flood & Dana Marquez
Social Security Administration
1301 Young St, Suite 627
Dallas, TX 75202

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Objectives (1/2)

- ▶ Review general and trust-specific reporting responsibilities
- ▶ Review 2020 POMS update
- ▶ Provide an overview of the Regional Centralization of SSI Trust Review Business Process, including step-by-step scenario

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Objectives (2/2)

- ▶ Provide fiscal year 2020 case totals
- ▶ Q&A Session (if time permits)

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Disclaimer

- ▶ This presentation discusses general SSI trust policy and procedures.
- ▶ Specific case scenarios involving an SSI claim or post-eligibility (PE) event require initial evaluation by the servicing field office (FO) technician and subsequent evaluation by the regional trust reviewer team (RTRT).

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[Answer Bar: Considering a Special Needs Trust](#)

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