

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
February 10-11, 2022
Austin, Texas**

Stephen W. Dale
The Dale Law Firm, PC
Pacheco, CA

Robert B. Fleming
Fleming & Curti, PLC
Tucson, AZ

Thomas Foley
National Disability Institute
Washington DC

Renée C. Lovelace
The Lovelace Law Firm, PC
Austin, TX

1

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.

2

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

3

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.



4

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

Also available as part of the eCourse

[2022 Special Needs Trusts eConference](#)

First appeared as part of the conference materials for the
18th Annual Changes and Trends Affecting Special Needs Trusts session
"Financial Projections for Quality of Life Possible When Factoring in Public and Private Resources"