

Today's Presenters

Sam Packard



**Social Security Filings,
case development, and
attorney fees**

Dustin Draper



**Social Security appeals
and hearings**

1

1

Alison Packard



Alison M. Packard

Alison is an attorney at THE PACKARD LAW FIRM in San Antonio, Texas. She focuses her practice on special needs planning, including trust and estate work, government benefits, guardianship, alternatives to guardianship, and general probate work.

Alison is the mother of a 27-year-old daughter with significant special needs. The combination of Alison's personal and professional experience allow her to better understand and serve her clients who worry about their loved ones with disabilities.

2

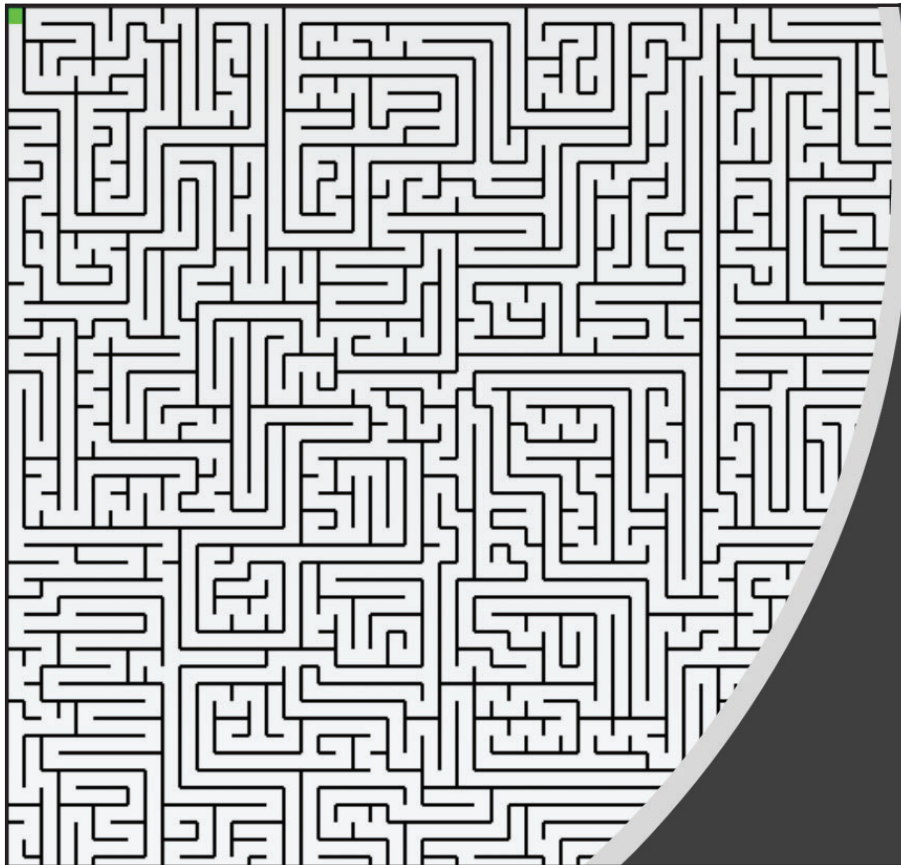
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Working with the Social Security Administration:

Applications, Appeals, Overpayments
and ISM Charges

3



Navigating
through the
Social Security
Maze

4

Understanding Social Security



5

Social Security has two Major Disability Programs

Social Security Disability Insurance (Title II)

Payments come from the Social Security trust funds and are based on income

A merit-based insurance program for workers who paid Social Security taxes on wages

(Supplement Security Income Title 16)

Payments come from the general treasury fund, NOT the Social Security trust funds.

A needs based public assistance program that does NOT require a person to have work history.

6

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Title search: Working with the Social Security Administration

Also available as part of the eCourse

[2023 Special Needs Trusts eConference](#)

First appeared as part of the conference materials for the
19th Annual Changes and Trends Affecting Special Needs Trusts session
"Online Options for SSI & SSDI Applications and Appeals_"