

# 2023 Essentials for Special Needs Planning (REPLAY)

## January 24, 2023 • STUDIO WEBCAST

### Tuesday Afternoon, Jan. 24, 2023

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|---------------------|--|
| 12:00 pm<br>1.00 hr | <b>Public Benefits Overview and Key Concepts</b><br><br>Hear an overview of the different public benefits programs that may impact a special needs client, and explore Texas-specific waivers as well as federal and state regulations.<br><br>Stephen W. Dale, The Dale Law Firm, PC - Pacheco, CA<br>Haley D. Greer, The Arc Of Texas - Austin, TX   |
| 1:00 pm             | <b>10-Minute Break</b>   |
| 1:10 pm<br>1.00 hr  | <b>Setting Up the Trust, Part I: First and Third Party Trusts vs. Pooled Special Needs Trusts</b><br><br>Understand the main types of special needs trusts and how to determine which approach best meets the needs of your clients.<br><br>Haley D. Greer, The Arc Of Texas - Austin, TX<br>Craig C. Reaves, Reaves Law Firm, P.C. - Kansas City, MO  |
| 2:10 pm             | <b>10-Minute Break</b>   |
| 2:20 pm<br>1.00 hr  | <b>Setting Up the Trust, Part II: Understanding the Basic Elements and Mechanics of SNT Provisions</b><br><br>Understand the basic elements of SNTs, including an overview on taxation, discretionary distribution provisions and language that is essential for inclusion in SNTs.<br><br>Stephen W. Dale, The Dale Law Firm, PC - Pacheco, CA<br>Peter J. Wall, True Link Financial - Denver, CO |
| 3:20 pm             | <b>10-Minute Break</b>   |
| 3:30 pm<br>0.75 hr  | <b>Setting Up the Trust, Part III: Funding the Trust</b><br><br>Explore common funding sources for special needs trusts and what you need to do to anticipate that funding in drafting the special needs trust.<br><br>Stephen W. Dale, The Dale Law Firm, PC - Pacheco, CA<br>Haley D. Greer, The Arc Of Texas - Austin, TX   |
| 4:15 pm             | <b>10-Minute Break</b>   |

4:25 pm  
0.75 hr

**Setting Up the Trust, Part IV: Educating Trustees**

Gain practical tips for educating trustees and family members who will administer the trust, including delegation of duties, spending plans, the basics of public benefits programs, and how to avoid problems for the beneficiary and the trustee.

Haley D. Greer, The Arc Of Texas - Austin, TX  
Peter J. Wall, True Link Financial - Denver, CO

5:05 pm  
0.25 hr

**Audience Q&A and Course Wrap Up**

Stephen W. Dale, The Dale Law Firm, PC - Pacheco, CA  
Haley D. Greer, The Arc Of Texas - Austin, TX  
Peter J. Wall, True Link Financial - Denver, CO

5:20 pm

**Course Concludes**