


Premier Trust Administration



**THE
CENTER**
FOR SPECIAL NEEDS
TRUST ADMINISTRATION, INC.

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Who We Are and What We Do

The Center for Special Needs Trust Administration, Inc. is a 501(c)(3) non-profit corporation that administers Pooled Trusts, Special Needs Trusts, and other specialty trusts. From the time of its inception in December of 2000, The Center quickly became the largest Pooled Trust provider in the country and has been a clear industry leader ever since.

With trust beneficiaries in every state and many years of experience working with multiple agencies, The Center is firmly established as the go-to provider for cases ranging from the basic to the highly complex. In addition to The Center's own Pooled Trusts, many non-profits have entrusted their Pooled Trust programs to The Center for oversight and administration.

Why People Choose Us

People choose us because we simplify the complexities of public benefit compliance and eligibility.

Public benefit programs such as Supplemental Security Income (SSI) and Medicaid are creatures of the Social Security Act, which has been described by the Federal Courts, "...as almost unintelligible to the uninitiated." ¹

The Social Security Act has been described as "unintelligible" because all the various statutes, administrative codes and agency regulations that control these programs work to create an inherent level of complexity that is difficult to overstate. Given this complexity, our ability to translate the unintelligible makes us a vital resource.

Our understanding of public benefit programs, our many years of experience, and our specialized administration services all combine to make us the clear choice for clients and attorneys who are looking for straight-forward solutions for their eligibility and public benefit compliance needs.

Why Our Services Are Beneficial

Our services are beneficial because they flow from two broad philosophical objectives that we strive to realize for all of our clients; peace of mind and an improved quality of life.

Peace of Mind is Provided By

- Knowing we have an in-house Call Center staffed by dedicated personnel who understand the unique needs of trust beneficiaries and how to meet those needs.
- Knowing that eligibility for public benefit programs is protected by our specialized understanding of technical program requirements.
- Knowing that trust beneficiaries who are vulnerable have the oversight that can protect against financial abuse and exploitation.

Improved Quality of Life is Provided By

- Our philosophy of managing trust assets to supplement and not disrupt the basic needs that are provided by public benefit programs.
- Our process of administering each trust for the sole benefit of each beneficiary, which protects eligibility for public benefits while also making the needs of each trust beneficiary preeminent.
- Our practical approach of coordinating life management services when appropriate, which increases the ability of trust beneficiaries to receive the maximum benefit from trust assets.

¹Friedman v. Berger, 547 F.2d 724, 727 n.7 (2d Cr. 1976)

The Nuts and Bolts of What We Do


While it is important to have the right philosophical objectives, even the best intentions are meaningless without the necessary foundation and structure to make them real. The Center makes its philosophy real by committing itself to a broad scope of services that cover every aspect of a case.

Some of Our Services

- Consultations for individual personal injury cases and mass tort cases.
- General assessment of public benefit programs to determine individual compliance needs.
- Knowledgeable and comprehensive support services for incoming cases, no matter the source.
- Personal case coordinators assigned to work directly with each trust beneficiary.
- Liaison with beneficiaries, family members, service providers, vendors, care givers, and other professionals.
- User-friendly distribution request process with quick response times to all requests.
- Monitoring and management of all trust distributions to protect public benefit eligibility.
- Full in-house Accounting Department with CPAs on staff.
- Accountings in standard fiduciary format or formatted to meet the requirements of any court.
- Real-time record keeping that meets the demands of public assistance compliance.
- Thorough, timely, and pro-active responses to public benefit agencies for compliance information.
- In-house Certified Financial Planner™ and professional money management services through a registered investment advisor.
- Coordination of life management assessments as needed to identify unique or special needs.
- Comprehensive database of professionals offering services and products such as guardianship, care management, elder and disability law, van conversions, and adaptive home contracting.
- Advisory and trust administration services for banks and other non-profit organizations.



Trusts That We Administer

The following descriptions are short because they are provided as examples only. However, we always welcome the opportunity to provide additional material to anyone who wants more information about [our services](#). 

Special Needs Trusts

Every Special Needs Trust (SNT) must meet some very specific federal criteria to be established properly. Establishing a SNT properly is crucial so that the SNT is excluded as a countable resource, which in turn protects the beneficiary's public benefit eligibility. Once established, it is equally important that a SNT be properly administered to protect ongoing eligibility and to meet the government's "sole benefit" requirements.

Pooled Trusts

Like SNTs, every Pooled Trust (PT) must meet some very specific federal criteria to be established properly. While the criteria for a PT is slightly different than it is for a SNT, establishing a PT properly is just as crucial so that the PT is excluded as a countable resource and protects the beneficiary's public benefit eligibility. Likewise, it is equally important that a PT be properly administered after it is established so that ongoing eligibility is protected and the government's "sole benefit" requirements are met.

Third Party Special Needs Trusts

These Trusts are established by parents of adult children, grandparents, aunts, uncles, siblings, friends or any other party who is independent from the beneficiary. They are always established with funds in which the beneficiary has no ownership interest, which means they do not need to comply with the government's strict "sole benefit" requirements. While this also means they can be part of a more traditional estate plan, they must still be administered to protect ongoing eligibility for public benefits.

Specialty Trusts:

Settlement Preservation Trusts

Unlike SNTs and PTs, Settlement Preservation Trusts (SPTs) are generally not used to protect public benefit eligibility. This means they are not required to meet the strict federal criteria that SNTs and PTs must meet. Removing the federal criteria introduces the possibility for a high degree of customization, and with proper forethought, SPTs are able to meet an extremely wide range of needs and circumstances. Even without extensive planning, SPTs can easily offer protection against exploitation and spendthrift tendencies while simultaneously providing flexibility and liquidity.

U.S. Department of Justice Victims Compensation Fund

The U.S. Department of Justice Victims Compensation Fund receives and administers restitution payments that are made in connection with successful prosecutions brought by the United States Department of Justice, Child Exploitation and Obscenity Section (the Department) against defendants who have committed sexual crimes against children. With trust beneficiaries in both the U.S. and overseas, The Center is pleased to fill a role in this important work and proud to have created this special program to meet the Department's needs.

Non-Resident Alien Disbursement Account

Our Non-Resident Alien Disbursement Account (Disbursement Account) is designed to solve the unique challenges involving settlements between domestic Defendants and foreign Plaintiffs who are Non-resident Aliens. In many cases, Defendants are unable or unwilling to make settlement payments to Non-resident Aliens because they do not have social security numbers or domestic bank accounts. The Center's Disbursement Account can be a very useful settlement tool because it addresses these specific issues.