

# Have you considered a Third-Party Special Needs Trust?

For families and friends who care for a loved one living with special needs, the thought of not being there someday can be terrifying. The “here and now” demands of daily life often delay families from doing the necessary planning.

It is important that families give thoughtful attention to the following:

- What kind of financial support will my loved one need when I am no longer able to assist them?
- Will my loved one be able to enjoy the same quality of life that they have now?
- Who can ensure that the funds are managed and administered properly for the benefit of my loved one?
- How can I ensure that needed public benefits will not be jeopardized?

Peace of mind is attainable through a **Third-Party Special Needs Trust**. Such a trust may be established and funded immediately or in the future with assets of any type. This may include proceeds from life insurance policies and retirement accounts. Since the funds originate from a third party there is no requirement to reimburse Medicaid when the beneficiary passes away. The trust may be established during the lifetime of the Grantor as part of a comprehensive estate plan, or it may be established as part of a pooled trust. Being proactive will mean the difference between your loved one receiving services that meet only their basic needs and leading a life which affords opportunities that public benefit programs cannot provide alone.



The Center for Special Needs Trust Administration Inc. (CSNTA) provides trust administration for **The National Community Pooled Trust** which is funded by a third party, usually a family member or friend. CSNTA can also serve as a trustee of an individually established Third Party Special Needs Trust. By establishing such a trust, the Grantors have the peace of mind of knowing that funds will be available for the Beneficiary when he or she needs them. Since the trust does not jeopardize the Beneficiary’s eligibility for certain public benefit programs such as SSI and Medicaid, the funds can be used to enrich the quality of their lives.

## Use Funds from the Trust for . . . .

Living Expenses (with some limitations if the beneficiary is also receiving SSI) · Automobile Expense/Insurance  
Private Pay Care Services · Supplemental Nursing Care · Attorney and Guardian Fees  
Medical/Dental Procedures (not covered by government assistance programs) · Entertainment/Travel Expenses

CSNTA has no minimum or maximum amount needed to fund the trust. Disbursement requests are reviewed and approved on an individual basis according to the needs and desires of the individual and the current and future financial condition of the trust. CSNTA is the largest pooled trust provider in the country and has had over twenty years of experience in the field assisting thousands of beneficiaries and their families. The staff at CSNTA understands the concerns that parents, family members and friends have in helping meet the needs of their loved ones.

For more information, call 877-766-5331 or visit [www.centersweb.com](http://www.centersweb.com)

# Peace of Mind for the Future.



## Third-Party Special Needs Trusts & The National Community Pooled Trust



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