



Protecting your assets

PRESERVING YOUR LEGACY

Pooled Trust for Minors



WHAT IS LEGACY ENHANCEMENT TRUST?

The Legacy Enhancement Pooled Trust was created to manage funds and assist in enriching the quality of life of its clients. The low costs and fees for establishing and maintaining the pooled trust are attractive to beneficiaries and their caretakers, as compared with the alternative of an expensive, traditional, large bank managed trust.



WHAT IS A POOLED TRUST?

A pooled trust is a trust established and administered by a nonprofit organization. A separate account is established for each beneficiary of the trust; for the purposes of investment and fund management, the trust pools the separate accounts. For self-settled, or (d)(4)(C) pooled trusts, each sub-account is established by the individual with a disability, a parent, grandparent, guardian, or a court, and the trust is funded with the assets of the individual with a disability.

WHO SHOULD USE A POOLED MINOR'S TRUST?

A pooled trust can be used for minors or individuals with disabilities who have received money from a legal settlement, an inheritance, or another kind of financial allocation.



Toll-Free: (866)587-8306
www.legacyenhancement.org

WHAT EXPENSES CAN THE TRUST PAY FOR ON BEHALF OF THE MINOR?

Services and items purchased must be used for the sole benefit of the minor. Allowable purchases include, but are not limited to: vehicles, clothing, eye and dental care, home or auto adaptations, and rehabilitation/therapy services. For a full list of allowable purchases, visit our website at www.legacyenhancement.org.



HOW ARE THE TRUST FUNDS MANAGED AND INVESTED?

Each beneficiary's trust fund is placed into a managed sub-account. The assets from all sub-accounts are "pooled" together and are invested and managed by professional money managers. Pooling the funds reduces administrative fees and increases the principal for investment purposes.

Beneficiaries of the trust receive earnings based on their share of the principal. Financial records are held for each individual beneficiary's account. To ensure a conservative investment approach, the Legacy Enhancement Board of Trustees provides oversight and management of the assets in partnership with a professional fund manager.

WHY SHOULD YOU CHOOSE LEGACY ENHANCEMENT?

The Mission

We are a nonprofit organization dedicated to providing minors and individuals with disabilities with an affordable, reliable trust solution.

The People

When you choose Legacy Enhancement Trust, you can expect warm, friendly service. We return calls and process distribution requests quickly and can accommodate any language through a translation service.

The Service

In addition to having online access to your trust account, we offer a prepaid debit card that gives you instant access to your trust funds.

START PLANNING FOR YOUR FUTURE TODAY.

To learn more, call us toll-free or visit our website.

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