



Protecting your assets

PRESERVING YOUR LEGACY

Trust Solutions



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.



PAYBACK TRUST (SPECIAL NEEDS TRUST)

A payback trust is established by a parent, grandparent, legal guardian, or a court and funded with the assets of an individual with disabilities. The trust allows the individual with disabilities to maintain needs-based government benefits while also providing the means to supplement goods and services not covered by government benefits. With low fees and dedicated oversight, Legacy Enhancement provides expert guidance in establishing and managing payback trusts.

MINOR'S TRUST

A minor's trust provides a safe place to hold a minor's assets until the age of majority. Legacy Enhancement provides all-inclusive professional administration for minor's trusts, including drafting the trust documents, helping determine how the funds will be allocated, managing financial distributions, and more.



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

THIRD-PARTY FUNDED

Third-party trusts are funded by an individual other than the beneficiary (e.g., a family member or loved one). They are often established as a part of the donor's estate plan to aid a beneficiary with special needs. Legacy Enhancement works with donors to establish third-party funded trusts that supplement, but do not supplant any needs-based government benefits the beneficiary may be receiving.



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.

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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