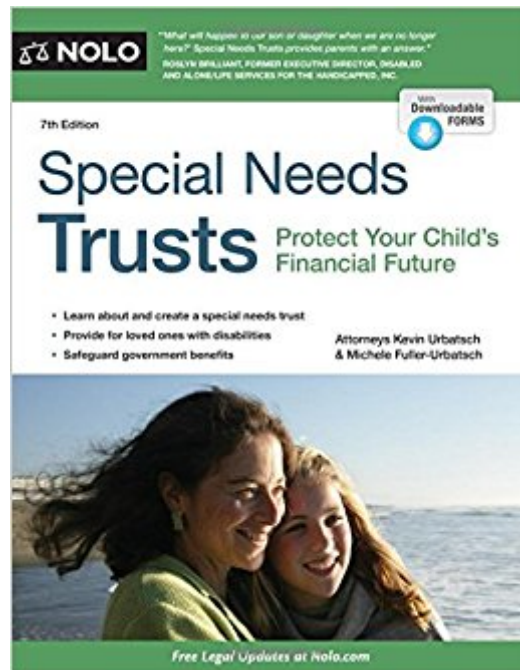


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# Special Needs Trusts: Protect Your Child's Financial Future



## Synopsis

Leave money to a loved one with a disability—without losing benefits. Use a special needs trust to provide financial security for your child (or anyone) with a disability, without jeopardizing important government benefits. Funds in a special needs trust do not count against eligibility for benefits and can be used to improve the quality of your child's life. This book provides everything you need to know about special needs trusts—whether you make one yourself or have an attorney draft one for you. The authors explain: how special needs trusts work the trustee's role ways to pass important information to successor trustees the pros and cons of joining a pooled trust, and creating special needs trust with or without a lawyer. This 7th edition is thoroughly updated and includes new chapters on ABLE accounts and letters of intent.

## Book Information

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## Customer Reviews

"Does a good job of explaining what a special needs trust can do to protect the benefits of a person with disabilities.... Even if after reading the book you feel you need a lawyer, you will have the knowledge to approach the subject." Support for Families of Children With Disabilities Newsletter

"What will happen to our son or daughter when we are no longer here?" Special Needs Trusts provides parents with an answer. • Roslyn Brilliant, Former Executive Director, Disabled and Alone/ Life Services for the Handicapped, inc.

Special Needs Trusts shows you how to provide for a loved one with a disability -- without

jeopardizing government benefits. It gives you all of the information and forms you need to either create a special needs trust yourself or to boost your knowledge and confidence while working with a lawyer. With Special Needs Trusts you get a: plain-English understanding of special needs trusts special needs trust form, with clear instructions chapter on pooled trusts sample letter to the trustee and more. Note: This book explains third-party special needs trusts -- that is, trusts you set up for someone else. You cannot make a special needs trust for yourself with this title.

Excellent summary of Special Needs Trusts (sometimes called disability trusts). I have been reading about special needs trusts on legal websites and spoken to several attorneys who specialize in special needs trusts and this is by far the best info I have read. I may use an attorney that specializes in Special Needs Trusts to double check my estate plan but at least I will have an excellent background in the questions I should be asking. Highly recommended if you are planning to leave any money to someone receiving Medicaid and/or SSI.

This book is designed to help readers set up their own special needs trust without an attorney--and you could do that with the resources provided, but I expect most readers will prefer to use a professional to establish an estate plan with the special needs trust as an important element. Whether or not you plan to use an attorney, however, this book is an invaluable resource for anyone considering a special needs trust. I have attended seminars on Special Needs Trusts, and my wife and I have had an initial meeting with an attorney to set up a trust for our disabled daughter. As a result, I came to this book with a well-developed idea of what could be accomplished with Special Needs Trust. Still, I learned a great deal from this book. There were several issues related to handling of assets within the trust and the management of housing expenses that became much clearer to me after reading this book. Reading this book helped form important questions that we will be exploring with our attorney, and helps us understand in greater depth what she will be doing for us. In this way, this book is helping us maximize the value we get from our attorney's services.

Full of good information. A friend used it and wrote his own. We are going to use it as a basis but plan to do ours thru a lawyer.

This book is an excellent resource. First for the family that wants to learn more about the Special Needs Trust (SNT) and decide if it is for them. It also is good for the family that knows that they need a SNT and is going to the attorney, but wants to know what to expect and think about the

important issues before they get to the attorney's office where the meter is running. Lastly, it is a great resource for the DIY individual.

I set up a Special Needs Trust for my son a couple of years ago; it was not a satisfying experience. The lawyer did not explain the process well, and I was left frustrated and poorer. If I had first read this book that I easily found and purchased at .com, I would have walked into the lawyer's office with confidence that at least I would have known all the basics in setting up the Trust and the questions to ask. As it was, I didn't know what I didn't know, and that was a distinct disadvantage. I would recommend this book for anyone thinking of setting up such a Trust. Read it first before contacting a lawyer.

Well written for the non-attorneys that are, for whatever reason, researching life planning. Easy reading. Saved a lot of money, book in near new condition, arrived quickly. Well earned 5 star rating.

Special needs trusts are very complicated. Often good lawyers know little of nothing about them. If your lawyers are limited like in a small town, this book is great. It also helps parents understand what they want and need to do.

Good source of background information. It helped me understand what the lawyer told me and helped me judge whether she knew what she was talking about.

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