“Top 30 Best Practice Tips When Advising Families With Special Needs Beneficiaries”

By

Kristen M. Lewis, Esq.
Atlanta, Georgia

<u>Summary of Presentation</u>

This presentation will review the “network” of Special Needs Trusts that serves as the foundation for securing the future of persons challenged by disabilities; the team of “allied professionals” that helps design and implement a comprehensive Special Needs Estate Plan; the types of government benefits and programs that can be accessed and preserved with proper Special Needs Trust planning; and the most common challenges (and solutions) encountered in Special Needs Estate Planning.

<u>Learning Objectives</u>

1. Learn how Special Needs Estate Planning differs from traditional estate planning.

2. Learn how to create a family’s “network” of Special Needs Trusts as the foundation for a comprehensive Special Needs Estate Plan.

3. Learn how to assemble a family’s team of “allied professionals” to help implement the Special Needs Estate Plan.

4. Learn how to develop a customized “funding formula” sufficient to provide for the current and future needs of the person with a disability.

5. Learn how to identify and “fix” existing funded trusts and traditional estate plans that are incompatible with Special Needs Planning for a person with a disability.

6. Learn and appreciate “person-first” language (instead of “disability-first” language).