

INVESTMENT MANAGEMENT | WEALTH PLANNING | TRUST, ESTATE AND FAMILY OFFICE SERVICES

Families of loved ones with special needs face many challenges. We offer considerable expertise gained from years of experience in special needs trusts, as well as a measure of sensitivity and compassion that affords families peace of mind in knowing that their family member's care has been provided for.

## Longstanding Expertise and a Comprehensive Approach

Special needs trusts provide benefits to and protect assets of individuals with disabilities. These trusts are often designed to receive settlements awarded in personal injury lawsuits. They are also often created as part of a parent's or other family member's estate or gifting plan to provide for the future care of their loved ones. These trusts are designed to supplement, but not supplant, the beneficiary's access to governmental benefits.

We are highly regarded for our expertise in special needs trusts and helping families address special needs situations including physical, cognitive, and psychological challenges. We work with our clients and their advisors to design practical and thoughtful solutions for complex and challenging circumstances.

Our dedicated team provides tailored advice that is prompt, reliable and technically sound. We are sensitive to the importance of minimizing the burdens for both the special needs individual and their family.

## Experience in Serving Special Needs

Our trust professionals have experience in several jurisdictions and provide compassionate and comprehensive care to families in a number of ways, including:

- Giving "hands on" help in coping with a family member's physical, cognitive, and/or emotional challenges

- Helping to facilitate the process of securing proper health care and other governmental benefits
- Helping to facilitate the design and construction of adaptive living spaces and/or the purchase and modification of adaptive vehicles
- Delivering streamlined and efficient decision making when applicable law requires discretionary distributions

## Our Commitment to Our Clients

Our team has the temperament, skill set and compassion to support beneficiaries, their families and caretakers under the most stressful conditions. For litigation-related matters, we work with families and their attorneys throughout the process:

### Pre-settlement

- Counseling in securing and maintaining governmental benefits
- Estate planning advice

### Post-settlement

- Creation of special needs trust
- Tailored investment program managed by our highly experienced investment professionals
- Administrative services related to real estate, motor vehicles, durable equipment, case management, health insurance/governmental benefits, special education and estate administration

## Why Choose a Professional Trustee

Administration of a special needs trust is complex. It may be tempting to name a friend or family member as the trustee due to the individual's familiarity with the family. However, the many tasks associated with managing the trust, the legal requirements and documentation are extensive and may be overwhelming for an individual to take on.

The appointment of a professional trustee with specific knowledge of the subject area provides assurance that the goals of the trust will be carried out in compliance with applicable law.

Our Trust Administration team offers considerable expertise gained from years of experience in special needs trusts, as well as a measure of sensitivity and compassion that affords families peace of mind knowing that their family member's care has been provided for.

## Contact Us

For more information about how you may benefit from our special needs trust services, please contact us at (877) 384-1111.



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