

Date

Via Certified Mail/Return Receipt Requested

Social Security Administration

ADDRESS

ADDRESS

Re: BENEFCIARY (SSN xxx-xx-xxxx)

To Whom It May Concern:

Please be advised that a sub-account in a Special Needs Trust Foundation's Self-Settled Pooled Trust under Section 1917(d)(4)(C) has been established and funded for the benefit of BENEFCIARY. The pooled trust was funded with BENEFCIARY's TYPE OF CASE/SETTLEMENT in the amount of \$ . Because BENEFCIARY receives SSI benefits, he/she has a duty to report a change of circumstances. Enclosed are the following documents for your convenience in reviewing the trust:

1. Copy of the POMS Eight-Step-Action chart.
2. Copies of the Trust document and Joinder Agreement.
3. Copy of *The SSI Spotlight on Trusts* publication.

In my opinion, this trust qualifies as a Special Needs Trust under Section 1917(d)(4)(C) of the Social Security Act and according to 42 U. S. C. 1396p (d)(4)(c) and the Social Security Association's Program Operations Manual at SI 01120.203 "Exceptions to Counting Trusts Established on or after 1/1/00."

If you have any questions regarding this letter or its enclosures, please contact me.

Sincerely,

ATTORNEY NAME

CSB:mb

cc:

NAME

Director, AGENCY

ADDRESS

Enclosures:

POMS Eight-Step Action Chart

Special Needs Pooled Trust

Joinder Agreement

*The SSI Spotlight on Trusts*