

# SPECIAL NEEDS TRUST SEMINAR

**Saturday, November 4, 2017**

**9:30 a.m. – 11:30 a.m.**

## **THE CURRENT DILEMMA:**

- Parents with a child who has a disability often find themselves in a dilemma when planning for the future of this child.
- Individuals with special needs may have resources from an inheritance or settlement that may exclude them from receiving government support.

Special Needs Trusts were established to assist families and individuals with special needs establish a discretionary trust that allows them to supplement the child's or individual's monthly income from SSI with restricted funds with no adverse effects. This seminar will inform families and individuals of their options for estate planning.

## **WHAT YOU'LL LEARN:**

- Planning for the future
- Court vs. non-court procedures
- Advantages of the Special Needs Trust and individual trust
- Options regarding trustee, including the Special Needs Trust Foundation
- Difference between a First-Party or Self-Settled Trust and a First-Party Trust

## **SPEAKER PROFILES:**

**Philip Lindlsey** – CELA Certified Elder Law Attorney, CLS Certified Legal Specialist, Estate Planning, Trusts and Probate

## **REFRESHMENTS**

## **INFORMATION:**

SNTF (619) 201-2672

## **LOCATION & DIRECTIONS:**

The Arc of San Diego  
9575 Aero Drive  
San Diego, CA 92123

From North or South I-15, exit at Aero Drive.

Travel West on Aero Drive for approximately one mile. At the top of the hill make a U-turn at Ruffin Rd.—**please note that this will be the second Ruffin Rd. you will cross.** Travel back down Aero Drive. Arc North Shores Center will be on your right. Park in the lot or on the street.

## **THE SPECIAL NEEDS TRUST**

**FOUNDATION (SNTF)** is a joint effort of Access to Independence, The Arc of San Diego, Community Catalysts, Community Options, Developmental Services Continuum, Home of Guiding Hands, NAMI San Diego, Partnerships With Industry, Sharp Healthcare Foundation, St. Madeleine Sophies Center, Stein Education Center of Vista Hill, United Cerebral Palsy Assoc. Of San Diego, and Unyeway.

## **REGISTRATION:**

\$8 per person\*

\$10 per family

**\*Seminar free of charge for people with disabilities.**

The SNTF thanks Nancy Spector for Speaking free of charge. Fee covers costs related to seminar.

# UNDERSTANDING SOCIAL SECURITY & SSI BENEFITS

**Saturday, November 18, 2017**  
**9:00 a.m. – 12:00 Noon**

SSI, SSDI, SSA, SGA...The alphabet soup of Social Security...  
What does it all mean?

Attend an in-depth seminar to gain an understanding of the Social Security system for people with disabilities. Find out, step-by-step, how to get and keep your SSI benefits without jeopardizing other income sources.

## **YOU WILL LEARN:**

- Eligibility for benefits
- How to calculate benefits
- The link between state & federal benefits
- Understanding rules & regulations
- The Work Incentive Program
- Maintaining benefits while working
- PASS, Plan for Achieving Self-Support

## **SPEAKER PROFILE:**

Get it straight from someone who knows! Dennis McRoberts worked for the Social Security Administration. His presentation will cover the application and approval process, and various work incentive programs available.

## **REFRESHMENTS**

## **INFORMATION:**

SNTF (619) 201-2672

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## **WALK AWAY WITH:**

An information packet that will guide you through the maze of Social Security and give you an understanding of where you fit in.

## **REGISTRATION:**

\$8 per person\*

\$10 per family

**\*Seminar free of charge for people with disabilities.**

The SNTF thanks Dennis McRoberts for Speaking free of charge. Fee covers costs related to seminar.

**The seminars will be held at:**

The Arc of San Diego – North Shores  
9575 Aero Drive  
San Diego, CA 92123

**Yes!** Please register me/us for the:

\_\_\_\_\_ Special Needs Trust Seminar  
\_\_\_\_\_ November 4, 2017  
\_\_\_\_\_ Number Attending \_\_\_\_\_

\_\_\_\_\_ Understanding Social Security & SSI Benefits  
\_\_\_\_\_ November 18, 2017  
\_\_\_\_\_ Number Attending \_\_\_\_\_

Enclosed is my check/money order for \$\_\_\_\_\_ Check here if Disabled  
\$8 per person\*/\$10 per family per seminar. \*Please note that seminars are free of charge for  
people with disabilities. Make checks payable to the Special Needs Trust Foundation

**REGISTRATION IS BASED ON A FIRST-COME-FIRST-SERVED BASIS. FORMS  
ARE DUE ONE WEEK PRIOR TO EACH SEMINAR. FORMS/PHONE CALLS  
RECEIVED AFTER THAT TIME CANNOT BE GUARANTEED ADMISSION. (No  
registration confirmation will be sent.)**

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State, Zip \_\_\_\_\_

Home/Cell Phone \_\_\_\_\_

**Please mail registration form and payment to:**

Special Needs Trust Foundation  
P.O Box 1890  
Lakeside, CA 92040

**The “SPECIAL NEEDS TRUST FOUNDATION” (SNTF):**

is a joint effort of Access to Independence, The Arc of San Diego, Community Catalysts,  
Developmental Services Continuum, Home of Guiding Hands, NAMI San Diego, Sharp  
Healthcare Foundation, Partnerships With Industry, St. Madeleine Sophie’s Center, United  
Cerebral Palsy Assoc. Of San Diego, Unyeway and Vista Hill.

For more information please visit our web site [www.sntf-sd.org](http://www.sntf-sd.org) or contact the Special Needs  
Trust Foundation at 619-201-2672.