

How a Special Needs Trust can Protect your Child!

What is a *Special Needs Trust*? Wiley Etter's highly protective and personalized tool, which provides the following benefits that traditional Wills and other forms of planning simply do not:



Preservation and Expansion of Funds

- When your child's inheritance is received by a Special Needs Trust, he or she will have access to money that won't disqualify him/her from state aid.
- The state will provide for basic comfort and care, and Trust funds can be used as a supplement—ensuring that the money lasts longer, while increasing quality of life!

Asset Protection against Additional Threats

- When money and other assets are held in Trust for the benefit of your loved ones, those assets are largely shielded from **DIVORCE**, **LAWSUITS**, **CREDITORS** and **BANKRUPTCY** proceedings!
- In contrast, money passed down outright via Will becomes personally owned by your loved ones. This opens the door for the above-mentioned predators to take that money away from them.

Third Party Oversight—“Trustee” and “Care Manager” Protection

- As opposed to a lump sum distribution to your child, a Special Needs Trust provides an opportunity to appoint a responsible “Trustee” to manage and oversee the funds for his/her benefit.
- Concerned that the Trustee won't have a firm grasp on your child's specific needs, or the nuances of any programs they are on or benefits they receive? Our Trusts direct your Trustee to consult with a licensed clinical Social Worker (i.e., a “Care Manager”) to ensure a smooth process!

Probate Avoidance

- Contrary to popular belief, when a person passes away with only a Will, their estate goes through the dreaded probate process.
- If your Trust is funded properly (a point of pride for Wiley Etter's attorneys), probate is greatly expedited! This diminishes court oversight—meaning less attorneys fees, quicker and more efficient distribution of assets and the protection of the family's privacy!