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Free Legal Resource · 2026

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Special Needs Trust Setup Checklist

Action Checklist — ClearLegalTips.com (2026)

Set up an SNT that protects benefits.

Plan

Confirmed third-party (not the beneficiary's own money)

Chose a trustee who understands benefit rules

Listed assets to fund the trust

Draft & Sign

Completed the trust terms

Had an attorney review it

Signed and notarized

Fund & Maintain

Re-titled assets/insurance into the trust

Avoided direct cash to the beneficiary

Kept records of discretionary distributions

Notes

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vary by state and change over time. Consult a licensed attorney for advice specific to your situation.