

Special Needs Trust (SNT)

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INSTRUCTIONS FOR USE

A third-party special needs trust holds assets for a person with disabilities WITHOUT disqualifying them from means-tested benefits (SSI/Medicaid). Fill in the bracketed fields. SNTs are technical — have an attorney review before funding.

1. Parties

Grantor (person creating the trust): _____

Trustee: _____

Successor trustee: _____

Beneficiary (person with special needs): _____

Beneficiary date of birth: _____

2. Trust Property

The Grantor transfers the following property to the Trustee to hold under this trust:

3. Purpose

☐ This trust is intended to SUPPLEMENT, not replace, government benefits

☐ Distributions are at the Trustee's sole discretion

☒ The Trustee should not make cash distributions directly to the beneficiary if it would reduce SSI/Medicaid.

4. Permitted Distributions (examples)

☐ Education and training

☐ Medical/therapy not covered by benefits

☐ Recreation, travel, electronics

☐ Personal care and quality-of-life items

5. Remainder

On the beneficiary's death, remaining assets pass to: _____

6. Governing Law

State: _____

Execution

Grantor

Printed Name: _____

Signature: _____

Trustee

Printed Name: _____

Signature: _____

Notarize per your state's trust requirements.

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