

SESSION # 1

SPECIAL NEEDS TRUSTS: All about Special Needs Trusts

What is a Special Needs Trust?

Every single day many people in Pennsylvania are forced to choose between "spending down" their money and losing their government benefits. For many people this happens when they apply for Medicaid or Supplemental Security Income (SSI). For others already receiving these benefits, they have to "spend down" just to be able to keep their Medicaid and/or SSI.

Find out how qualified individuals can save their money and get government benefits too!

Come to this seminar to learn about:

- ❖ *What a Special Needs Trust is.*
- ❖ *How they work.*
- ❖ *Who can benefit from a trust.*
- ❖ *How to get one.*

Not only will you learn all about Special Needs Trusts, you'll find out which one may be the right one for you.

You'll learn the differences between:

- ❖ *Common Law Trusts*
- ❖ *Payback Trusts*
- ❖ *Pooled Trusts*

SESSION # 2

SPECIAL NEEDS TRUSTS: SSI and Special Needs Trusts

Can my SSI money be placed into a Special Needs Trust?

Yes and No! Confusing? You bet! Make the wrong move and you could end up back at square one.

Come explore Supplemental Security Income (SSI) issues commonly faced by individuals with Special Needs Trusts and their families. Find out the answers to this and other frequently asked questions.

We'll help dispel some common myths that spread like wildfire and scare people into spending down money needlessly.

You'll learn a something about:

- ❖ *Food and Shelter/ The POMS Manual*
- ❖ *SSI Reporting Requirements for distributions/disbursements.*

Find out the facts you need to make the right decisions to stay eligible.

At this seminar we will also cover:

- ❖ *Sheltering assets to apply for SSI.*
- ❖ *Troubleshooting "found" assets.*
- ❖ *Getting and staying eligible.*

BRADLEY LAW LLC

"YOUR SPECIAL NEEDS SOURCE IN PENNSYLVANIA"

Registration Information / Form.

LOCATION:

The Arc of Montgomery, Berks & Bucks Counties
3075 Ridge Pike
Eagleville, PA 19403
Visit www.marcpa.org or call 610-265-4700 for directions.

DATES AND TIMES: (Please indicate your choice(s).)

- I am attending Session # 1 from 10:00 a.m. to 12 Noon. January 12th, 2010.*
- I am attending Session # 2 from 1:30 p.m. to 3:30 p.m. January 12th, 2010.*

TUITION: FREE (Seating is Limited to 45 per session.)

CONTACT INFORMATION:

Name _____
Address _____
City _____ State ____ Zip _____
Email (for confirmation) _____
Phone (____) _____ - _____
Fax (____) _____ - _____

BY MAIL: *Print and complete this form and mail it to Bradley Law LLC, P.O. Box 26587, Collegeville, PA 19426.*

BY FAX: *Print and complete this form and fax it to Bradley Law LLC at 484-902-0120.*

BY EMAIL: *Send an email with the above information to register@bradleylawllc.com.*

ONLINE: *Go to www.bradleylawllc.com, click on the Register button and follow the instructions on the Registration Page.*

Dates and Locations.

Tuesday, January 12th, 2010

The Arc of Montgomery, Berks & Bucks Counties
3075 Ridge Pike, Eagleville, PA 19403
(In the Lower Level Training Room)

Session # 1 All about Special Needs Trusts
10:00 a.m. to 12 Noon; check-in at 9:45 a.m.

Session # 2 SSI and Special Needs Trusts
1:30 p.m. to 3:30 p.m.; check-in at 1:15 p.m.

Session # 1 at a Glance.

9:45	-	10:00	Check-in.
10:00	-	10:30	Background/Updates.
10:30	-	11:00	Mechanics/Legalities.
11:00	-	11:10	Break.
11:10	-	11:35	Who is a qualified Individual?
11:35	-	12:00	How to get a trust./Types of Trusts.

Session # 2 at a Glance.

1:15	-	1:30	Check-in.
1:30	-	1:45	SSI- A lifeline for many.
1:45	-	2:15	Trust disbursements- What is Food and Shelter?
2:15	-	2:30	The POMS Manual.
2:30	-	2:40	Break.
2:40	-	3:05	Sheltering Assets.
3:05	-	3:30	Fixing "found" assets/ Successful SSI applications.

BRADLEY LAW LLC

"YOUR SPECIAL NEEDS SOURCE IN PENNSYLVANIA"

The Community Seminars Program is a free public service offered by Bradley Law to the communities of Southeastern Pennsylvania. The Community Seminars Program offers information sessions on topics of interest to the public with a direct focus towards individuals with disabilities and their families. The Community Service Programs' goal is to provide accurate information to those in need.

About the Presenter:

Patrick J. Bradley, Esq. has been working in the fields of developmental disabilities and behavioral health for over a decade in Southeastern Pennsylvania. His practice covers all aspects of disability law. To find out more visit www.bradleylawllc.com.

ADDRESS CORRECTION REQUESTED

FROM:
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PLACE
STAMP
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TO:

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2 FREE PUBLIC SEMINARS!

Brought to you through the Community Seminars Program at Bradley Law.

BACK-TO-BACK!

Take advantage of this opportunity to attend different Sessions on the same day at the same location, back to back!

SESSION # 1

SPECIAL NEEDS TRUSTS:

All about Special Needs Trusts

TUESDAY, JANUARY 12TH, 2010
10:00 A.M. TO 12 NOON

SESSION # 2

SPECIAL NEEDS TRUSTS:

SSI and Special Needs Trusts

TUESDAY, JANUARY 12TH, 2010
1:30 P.M. TO 3:30 P.M.

BOTH SESSIONS ARE BEING HELD AT
THE
ARC OF MONTGOMERY BERKS &
BUCKS COUNTIES.

(See Inside for Details.)