Special Needs Planning

Planning for the long-term well-being of a loved one with special needs requires careful consideration and a deep understanding of the unique legal and financial challenges involved. We assist clients with navigating the complexities of planning for children and adults with special needs, including the creation of both third-party and self-settled special needs trusts to allow these individuals to maintain eligibility for essential government benefits, such as Medicaid and Supplemental Security Income (SSI) while still having access to funds for supplemental needs. We can help establish guardianship or conservatorship arrangements to ensure their legal and financial affairs are properly managed and can advise on the establishment and use of a tax-advantaged savings account for special needs individuals that allow them to save for qualified disability expenses without jeopardizing their eligibility for public benefits programs. We also work closely with families to coordinate private resources with government benefits to create a comprehensive and sustainable plan for their long-term care and support.

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Experience

Representative Matters

- Structured a comprehensive estate plan for a family with a special needs child, creating long-term protections while preserving flexibility for other beneficiaries.

Insights & More

Seminars & Events

2023 Family Law Symposium

1.26.23