



Kile & Kupiszewski LLC.
Law Firm

Special Needs Planning



Issues to think about

Guardianship—the court process of appointing someone to make health, housing, and education decisions for an incapacitated person.

Conservatorship—the court process of appointing someone to manage money for an incapacitated person.

Special Needs Trusts—a trust to hold assets for the benefit of a disabled person without negatively impacting SSI and ALTCS benefits.

ALTCS—the Arizona State Medicaid program to help offset the cost of caregivers, group homes, assisted living centers, and related services.

ABLE Accounts—a place to accumulate or gift money to a person who was disabled prior to age 26 without negatively impacting SSI and ALTCS benefits.

SSI—Supplemental Security Income, for low income, low asset, disabled individuals.

SSDI—Social Security Disability Income for low income individuals who have worked sufficient quarters to qualify for SSDI which pays more than SSI.

Medicare—to cover medical expenses. Someone who has been on SSDI for at least 24 months will then be eligible to receive Medicare benefits, regardless of age.

Questions to consider

What resources are available to find answers?

How does decision making authority change when a child reaches age 18?

Will an UTMA (Uniform Transfer To Minor Account) or a 529 Plan impact SSI or ALTCS eligibility?

What other legal issues do I need to think about?

How Can We Help?

Our firm can assist you in finding the right resources. We are here to draft documents that are needed to ensure the right person is making the right decisions. You understand your loved one and we understand the legal system and the benefit programs that might be available.



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