

ATTORNEY ACKNOWLEDGEMENT

Empowering individuals with disabilities to live their fullest life. John 10:10



Third Party Pooled Special Needs Trust

Please have the Representative Attorney complete this checklist and submit it with the Joinder Agreement.

It is not the intent of The Full Life Center to provide legal advice.

- The Beneficiary of the trust is disabled as defined by the Social Security Administration.
- I have informed my client that a K-1 will be provided to the Beneficiary Advocate, as required by IRS Regulations. These documents may have tax consequences to the Beneficiary which should be discussed with a tax preparer.
- Funds deposited into The Full Life Center Discretionary Trust belong to a third party. The Beneficiary's own assets cannot be used to fund a third party trust.

Protection of benefits for a client receiving Supplemental Security Income (SSI) and Medicaid

- I have informed my client that in order to protect SSI benefits, the trust does not distribute funds for shelter or food as SSI is intended to pay for these expenses.
- I have informed my client the trust follows the rules regarding SSI and Medicaid in order to maintain government benefits eligibility.
- I am aware of my duty to identify and notify public agencies from whom the Beneficiary receives benefits. If funding is immediate, I will notify these agencies of the funded trust and forward a copy of the notice to FLC. If funding is deferred, I will advise the Beneficiary Advocate to notify the public agencies when the trust is funded, and forward a copy of the notice to FLC.

End of Life Disbursements

- I have informed my client that the Beneficiary Advocate should notify FLC as soon as possible upon the death of the Beneficiary. I have advised my client that distributions can only be made for trust-related administrative fees after the Beneficiary's death. The remaining funds will be distributed pursuant to the Joinder Agreement.

For a client receiving Section 8 Subsidized Housing (HUD)

- I have informed my client that a special needs trust may impact eligibility for subsidized housing.

Beneficiary Name: _____ Beneficiary Date of Birth: _____

Attorney Name: _____ Attorney Signature: _____

Date: _____

"My purpose is to give life in all its fullness" – John 10:10

The Full Life Center, Inc.

349 E. High Ave., New Philadelphia, Ohio 44663

Phone: (330) 343-0008 Fax: (330) 602-2822 Email: office@TheFullLifeCenter.org

www.thefulllifecenter.org