



Transforming Lives



TrilliumHealthResources.org

1-866-998-2597

Are you the parent or caregiver of a person with an intellectual/developmental disability and/or mental health condition and concerned about their financial future?

The *Future Planning* project will provide education and financial assistance to set up the Special Needs trusts to support members after the death of a primary caregiver and/or assist members with saving money for their future through special types of accounts. Without the correct financial planning, a loved one could be subject to repayment of Medicaid benefits or government benefits such as SSI or SNAP.

- The *Future Planning* project contracts with attorneys to provide education and assistance. These attorneys will:
 - assist families with setting up Special Needs Trusts and/or ABLE accounts
 - work with families of members with intellectual/developmental disabilities (I/DD) and/or mental health conditions that require long term care and who are receiving services managed by Trillium
- Trillium will cover all attorney fees for the creation of Special Needs trusts and ABLE accounts.
- *Future Planning* seminars will be held across the Trillium region. The seminars will provide information regarding Special Needs trusts and ABLE accounts. Please visit our website (above) for a schedule of the seminars and *Future Planning* financial assistance applications.
- To be eligible for Future Planning financial assistance, members must meet the following conditions:
 - three years of age and older;
 - have an intellectual/developmental disabilities (I/DD) and/or mental health condition that requires long term care/support.
- Members can apply for financial assistance using the *Future Planning* application located on the Trillium website or can request an application to be mailed to them by contacting Trillium at 1-866-998-2597 or FuturePlanning@TrilliumNC.org.
- *Members and their families are not required to attend a Future Planning seminar to request financial assistance.*

UPCOMING SEMINARS

ADDITIONAL SEMINARS ARE BEING PLANNED AND WILL BE ANNOUNCED

August 22, 2019	100 East Colonial Ave. Elizabeth City, NC 27909	6 - 7:30pm
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- **What is a Special Needs Trust?**

A type of trust specifically for persons with disabilities that provides goods and services while maintaining the eligibility or current level of needs-based public benefits.

- **What is an ABLE account?**

A tax-advantaged savings account for individuals with disabilities and their families.

