

[www.lifeplanofky.org](http://www.lifeplanofky.org)

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For more information on issues of interest, please ask to be added to the listserv “Special Needs News”, by emailing [KarenLPerch@gmail.com](mailto:KarenLPerch@gmail.com)



**Pooled Trust**  
**Creating a Legacy of Dignity and Love**



Pooled Special Needs Trust For People with Disabilities  
& Their Families

## DON'T LOSE OR BE DENIED YOUR GOVERNMENT BENEFITS!

Under current Federal and State Law, a person with disabilities having more than \$2,000 in countable assets may not be eligible for Medicaid assistance.

With a Special Needs Trust, you (or your loved one) can receive the benefit of assets placed into a sub-account with Life Plan of Kentucky and still receive Medicaid or Supplemental Security Income (SSI).



### HOW DOES IT WORK?

It's easy to enroll in a Special Needs Trust with Life Plan of Kentucky. Just complete the Joinder Agreement to open an account. When you have a supplemental need, a request for a distribution from your account is reviewed to ensure it does not jeopardize your eligibility for means-tested governmental benefits

We'll even help you learn that you can use the funds for things like:

Dental Work	Trips to visit Family
Home Modifications	Therapies
Vacations Cable	Lift equipped Van
TV Internet	Cell Phone
Service	



### Life Plan of Kentucky, Inc. is here to help

As a non-profit organization, 501 (c) (3) organization Life Plan can serve as a Trustee for: **First Party trust accounts** (person with the disability funds with his/her money) or **Third Party trust accounts** (family member or other who funds the trust). Trust accounts can be funded with money from:

Inheritance	Wages Earned
Life Insurance	Restitution Payments
Financial Gifts	
Social Security Back Payments	
Personal Injury Settlement	

**Need Help? Call Life Plan of Kentucky, Inc. at (859) 514-6073**