



# IS A THIRD-PARTY SUPPLEMENTAL NEEDS TRUST NECESSARY FOR YOUR ESTATE PLAN?

Will one of your intended beneficiaries have a recognized disability as determined by the Social Security Administration that renders the beneficiary unable to engage in any substantial gainful activity by reason of any medically determined physical or mental impairment which can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than twelve months?

## DOES THE INTENDED BENEFICIARY...

- ☐ Currently receive or will be applying for Social Security Income?
- ☐ Currently receive, or plan to apply for Medicaid?
- ☐ Want to maintain or qualify for Social Security Income and/or Medicaid after benefitting from an inheritance?

If you have an intended beneficiary with a recognized disability and you answered yes to any of these questions, you should contact our office to discuss whether a Third-Party Supplemental Needs Trust is right for your estate plan.