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ADMINISTERING A SPECIAL NEEDS TRUST

What Can I Buy or Pay For In A Special Needs Trust?

- Home, Upkeep and Utilities
- Clothing
- Phone, Cable and Internet Services
- Vehicle, Insurance, Maintenance, Gas
- Pre-paid Burial/Funeral Arrangements
- Tuition, Books, Tutoring
- Travel and Entertainment
- Household Furnishings and Furniture
- Television, Computers and Electronics
- Durable Medical Equipment
- Care Management
- Therapy, Medications, Alternative Treatment
- Taxes
- Legal, Guardianship and Trustee Fees
- Loans, Credit, Debit and Gift Cards

What are the Trustee's Duties?

- No Self-Dealing
- Impartiality
- Delegation
- Investment
- Bond
- Titling Assets
- Accounting Requirements
- Reporting to Social Security
- Reporting to Medicaid
- Reporting to the Court
- Wrapping up the Trust
- Income Taxation of Special Needs Trust