



The National Foundation for
Special Needs Integrity, Inc.
Pooled Special Needs Trust



**A Note to Social Workers, Residential Providers
and Case Managers:**

Our online account access, FDIC insured sub-accounts, ETF capability and graduated fee schedule make The Foundation a fast, safe, and easy alternative for Social Workers, Case Managers and Residential Providers who serve Consumers with excess funds.

Situations calling for a pooled special needs trust can arise in several ways. Case Managers, Residential Providers and Social Workers should be able to recognize when their Consumer needs a safe harbor for his or her assets. Most likely, a SNT situation will arise in one of the following situations:

1. Your Consumer receives a large lump-sum back payment from the Social Security Administration;
2. Your Consumer receives an unexpected inheritance;
3. Your Consumer receives a gift from a family member;
4. Your Consumer has a job and is forced to waste excess earnings each month in order to maintain eligibility for Medicaid, Medicaid Waiver, or SSI benefits;
5. Your Consumer is involved in litigation (most often, the attorney will have taken care of this problem, but not always); and
6. Other situations arise, although rarely. One beneficiary funded a sub-account with a small lottery winning.

If you encounter any of the above situations, give us a call. We can help. Also, ask us about scheduling a presentation at your place of business for your colleagues and staff. We perform in-service presentations at companies, agencies, and firms throughout the United States.

- A True National Pooled SNT
- No Monthly Spending Limit
- FDIC Insured Sub-Accounts
- 24/7 Online Account Access
- Flexible Investment Options
- Fast Disbursement Response
- Reasonable Fees

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**Every Trust Needs
A Foundation**