



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



#### The Foundation's Third-Party and Testamentary Trust

Parents and Grandparents of a child with a disability can place assets into a special needs trust that otherwise would pass directly to their child or grandchild. Rather than passing directly to the child or grandchild, the money is directed straight into the special needs trust. Because of the way the trust is drafted, assets placed into the trust are not counted against the Beneficiary for the purposes of determining eligibility for Means-Tested Benefits. The Trustee then administers the trust for the in the best interest of the Beneficiary in a manner that does not jeopardize eligibility for government benefits.

So long as government regulations are adhered to, a special needs trust can be used for most anything that will enhance the Beneficiary's overall material quality of life. The Beneficiary gets the best of both worlds—valuable government assistance for food, shelter, medical care and community-based services, while still having access to the spending power of the estate left for him or her by parents or grandparents.

Some unique features of The Foundation's Third-Party and Testamentary pooled trust include:

1. A low \$10,000 funding minimum
2. The flexibility to easily fund a trust during the lifetime of the Donor
3. No annual "Renewal Fee"
4. Flexible annuitization options
5. No Mandatory Remainder to The Foundation
6. No penalty for posthumous enrollments
7. Easy to understand fee schedule

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

10500 Kincaid Drive  
First Floor  
Fishers, IN 46307

(317) 841-8795  
FAX 1-866-472-8740  
TOLL-FREE 1-866-979-8770

[specialneedsintegrity.org](http://specialneedsintegrity.org)

**Every Trust Needs  
A Foundation**