



Administering the California Special Needs Trust

Kevin Urbatsch, Michele Fuller

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Administering a special needs trust (SNT) is a very important job, which often has a profound impact on the life of persons with disabilities. In most cases, the SNT trustee is providing the beneficiary goods and services that improve their quality of life. In some cases, the SNT trustee may be the only person looking to the beneficiary's welfare. Thus, the role of SNT trustee is often a more substantial role than in many other types of trusteeships. The great SNT trustee is a solid financial manager, accountant, record keeper, legal counselor, public benefits advisor, social worker, housing coordinator, civil rights advocate, guardian, and life coach. This is why author Kevin Urbatsch published his book titled Administering the California Special Needs Trust.

It has been five years since the book was published. The reception for it far exceeded expectations. There have been excellent reviews of how it has helped SNT trustees, beneficiaries, their families, and professionals who advise persons with disabilities. After reviewing the book, the Federal Financial Institutions Examination Council (FFIEC) flew Kevin to Washington D.C. to present to federal government bank auditors on what to look for when auditing corporate trustees when banks administer special needs trusts. Other than the numbers that change each year, like SSI or SSDI, the balance of the book was current and up-to-date. However, there were some subjects that were missing in the book plus a couple of big changes that occurred since publication, including the passage of the Affordable Care Act and the ABLE (Achieving a Better Life Experience) Act that provide excellent new tools for the SNT trustee.

Kevin recruited several of his professional colleagues to assist in preparing this Second Edition of the book including Michele Fuller, Robert Nuddleman, Herb Thomas, Courtney Kosnik, Scott MacDonald, and Daniel Cutter. With their assistance, Kevin added the following new chapters to the book Paying Caregivers, Paying Trustee's Fees, Understanding and Utilizing ABLE Accounts, and Protecting the SNT Trustee. Kevin was also able to update and revise the information in the balance of the book and provide additional forms to make the job of being an SNT trustee safer and more efficient.

With the checklists, form documents and law summaries included, Administering the Special Needs Trust contains a wide range of information for those charged with the responsibility of managing an SNT for persons with disabilities.

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