



The Rutherford Law Firm, PLLC

WILLS · TRUSTS · PROBATE · ESTATE ADMINISTRATION

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SPECIAL NEEDS PLANNING · FAMILY WORKSHEET

Special Needs Trust Family Worksheet

A special needs trust can provide for a loved one with a disability without jeopardizing means-tested benefits such as SSI and Medicaid, which have strict resource limits. This worksheet gathers the information the attorney needs to design a trust around your family member's real needs.¹

◆ About the beneficiary

Name and date of birth

Nature of the disability

Current benefits received (SSI, Medicaid, other)

Current living arrangement and care providers

◆ Funding & trustee

How the trust will be funded (inheritance, life insurance, settlement)

Proposed trustee

Successor trustee

◆ The beneficiary's needs and your goals

Daily support, therapies, equipment, enrichment, and long-range wishes

REFERENCES & SOURCES

1. Social Security Administration, Supplemental Security Income (SSI) (means-tested program with strict resource limits). www.ssa.gov
2. Tex. Est. Code §§ 751.001, 752.051 (Durable Power of Attorney Act; statutory durable power of attorney form). statutes.capitol.texas.gov
3. Texas Law Help, "Wills, Estate Planning and Probate." texaslawhelp.org
4. Texas State Law Library, Wills & Directives research guide. guides.sll.texas.gov
5. Texas Disciplinary Rules of Professional Conduct, Part VII (Rules 7.01–7.06). www.texasbar.com

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