

Special Needs Trusts with PLAN of MA and RI

Special needs trusts are an important tool for helping people with disabilities remain eligible for needs-based government benefits while preserving their personal assets and enhancing their quality-of-life.

PLAN of MA and RI offers trusts for individuals where the donor is the beneficiary (First Party trust), and trusts where money is set aside for the beneficiary by others (Third Party trust).

PLAN's all-inclusive service model means that trust beneficiaries and their families receive professional and dedicated service coordination by licensed social workers and prudent money management by a professional investment firm. All services, including all disbursements, trust administration and case management, fund investing and annual reporting are included in one annual fee.

There is no minimum deposit and PLAN does accept future-funded trusts (and waives the annual fee until the account is funded).

Fees are detailed in our Frequently Asked Questions (FAQ) and on our website at <https://www.planofma-ri.org/what-we-do/faq/>.

The investment manager for trust accounts is Webster Private Bank.

We look forward to consulting with you about how our special needs trusts could work for you.

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Enrollment Specialist

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PLAN of Massachusetts and Rhode Island, Inc. (PLAN)

A non-profit organization that proudly serves people with disabilities of all ages and their families throughout Massachusetts and Rhode Island.

PLAN's professional special needs pooled trust services preserve financial assets, protect access to public benefits, and provide personalized guidance on use of funds.

PLAN was founded in the 1960's by families and parents recognizing the need to plan for the intergenerational responsibility for the care of family members with special needs. Today, PLAN is entrusted with managing more than \$50 million in beneficiary assets for more than 900 individuals.

PLAN's service coordinators, trust-administration staff, and executive leadership have extensive experience working with, and on behalf of, disabled individuals and elders with limitations.