Midwest Special Needs Trust: Safeguarding Public Benefits for People with Disabilities
Developed with the KCMB A Probate and Estate Planning Committee

Tuesday, April 22, 2014 • 11:30 AM – 1:00 PM
KCMB A Conference Center
Credit: Missouri – 1.2 / Kansas – 1.0
Cost: KCMB A Member - $30  Non-Member - $50

DESCRIPTION

Lynn Carter, Executive Director of Midwest Special Needs Trust (MSNT), will provide an overview of special needs trusts and their use to supplement public benefits to improve the quality of life for individuals with disabilities. Lynn will discuss the basics of special needs trusts and the statutes, regulations and policies that MSNT, as Trustee and a pooled trust, must observe to protect the trust beneficiary’s important public benefits such as SSI and Medicaid. The presentation will include discussion of MSNT processes for establishing a trust, requesting distributions from the trust, and trust closing processes. Time will be allotted at the conclusion of the presentation for questions from the audience and discussion.

SCHEDULE

11:30 AM  Registration
12:00 PM  Seminar
1:00 PM  Adjourn

MODERATOR
ANNA B. RACCUGLIA, THE COMMERCE TRUST COMPANY

 SPEAKER
LYNN CARTER, MIDWEST SPECIAL NEEDS TRUST

*Course materials will be provided in electronic format only and are accessible with your laptop, tablet or other mobile device during the event. Final course materials will be posted prior to the event at www.kccle.org, calendar, event, under the materials tab. Parking will be validated at the event.

**On-site registrations are welcome; however, seating and/or meals cannot be guaranteed unless you pre-register.

4 WAYS TO PRE-REGISTER:

1. **Online** at kcmba.org
2. **Mail** completed registration form with payment to KCMB A UMKC CLE, Two Pershing Sq., 2300 Main St., Suite 100, Kansas City, MO 64108.
3. **Phone** (816) 474-4322
4. **Fax** (816) 474-0103

Parking is available at Two Pershing Square via OK Street, off Grand Blvd on level P3. Visit kcmba.org/parking for directions and a map. Parking will be validated at the event.

Event cancellations received 48 hours or more prior to the start of an event may receive a cash refund minus a $25 processing fee, or a credit voucher in the full amount of fees paid which will be valid for one year from the date of the event.

Substitutions for paid registrations are accepted. Credit vouchers are transferable.

No shows will not receive a refund or credit voucher. No shows requesting refunds due to emergency or hardship must be received in writing no more than 30 days after the event date.

Special accommodations can be made by contacting KCMB A UMKC CLE at (816) 474-4322 prior to the program date.

KCCLE.org

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