

WHY CHOOSE NYSARC?

EXPERIENCE:

NYSARC has served people with intellectual and developmental disabilities since 1949 and has been a leader in supplemental needs trust administration since 1972.

BENEFIT SECURITY:

NYSARC understands benefit rules and the needs of people with disabilities to make appropriate distributions from the trust that preserve your loved one's continued eligibility for benefits.

PERSONAL SERVICE:

Responsive and caring staff take a hands-on approach to help your loved one maximize the funds in a trust account to enhance his/her quality of life.

**It's the kind of service
you won't find at a bank!**



NYSARC Trust Services
P.O. Box 1531
Latham, NY 12110

Phone: (518) 439-8323

Fax: (518) 439-2670

Email: trustdept@nysarc.org

www.nysarctrustservices.org



NYSARC TRUST

(UNRESTRICTED FUND)

3rd PARTY SNT
for a loved one with I/DD



**Call (518) 439-8323
to learn more!**

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NYSARC TRUST UNRESTRICTED FUND

NYSARC's Unrestricted Fund is a third-party special needs trust (SNT) that allows a parent, grandparent, or other interested person to set aside funds for a loved one with an intellectual and/or developmental disability (I/DD) without impacting his or her eligibility for means-tested government benefits, such as Medicaid and Supplemental Security Income (SSI).

WHY CREATE A NYSARC TRUST?

Benefits cover many of the basics of daily life. But what about all of the other things that could improve your loved one's quality of life? Purchases that make life easier, and more pleasant.

With a NYSARC Trust (Unrestricted Fund), you can protect your loved one's eligibility for benefits now while providing the means to purchase life-enhancing items and services that their benefits do not provide.



NYSARC TRUST:

DONOR/GRANTOR: Funded by a parent, grandparent, sibling, friend, or other third party

MINIMUM TO FUND: \$25,000

ADMIN FEES: No administrative fees (nominal investment management fee)

REMAINDER FUNDS: First \$25,000 is retained to support The Arc New York's Guardianship Program. Distribution of any remaining funds as directed by Donor/Grantor.



ESTABLISHING A NYSARC TRUST

It is never too early to consider setting up a SNT for your loved one. Even a small direct inheritance could cause a reduction in benefits.

Consult with an attorney who will draft the trust. You can fund a trust for use during your lifetime or inclusion in your Will as part of your estate plan.

Contact us with questions! NYSARC will work with your attorney to provide sample language as needed.

Once the trust is funded, your loved one is assigned a dedicated account manager who works closely with your loved one, other family members, and service providers to enhance his/her quality of life.

Do you have questions?

Call (518) 439-8323 and we will gladly assist you!